DOVER DISTRICT COUNCIL

RETAIL & TOWN CENTRE NEEDS ASSESSMENT - 2018

FINAL REPORT

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EXECUTIVE SUMMARY

Introduction

1. Carter Jonas was commissioned by Dover District Council to produce a Retail and Town Centre Needs Assessment ('RTCNA') to help inform both plan-making and development management decisions across the local authority area.
2. The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) published in March 2012.
3. The key elements of the study were:
   - a review of national and local planning policy pertaining to retail planning and town centres;
   - a review of trends driving changes in the retail and leisure sectors;
   - market share analysis for convenience and comparison goods shopping and leisure uses across the District based on a specifically commissioned Household Telephone Interview Survey (HTIS);
   - a health check for the Council's main town centres of Dover, Deal and Sandwich and an overview of Local Centres and Villages;
   - quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the Council area up to 2037;
   - a 'gap' assessment of commercial leisure and other town centre uses;
   - recommendations on the extent of the existing Primary Shopping Frontages (PSFs) and Secondary Shopping Frontages (SSFs) in the District's main centres; and
   - strategic advice on how the Council can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2037.

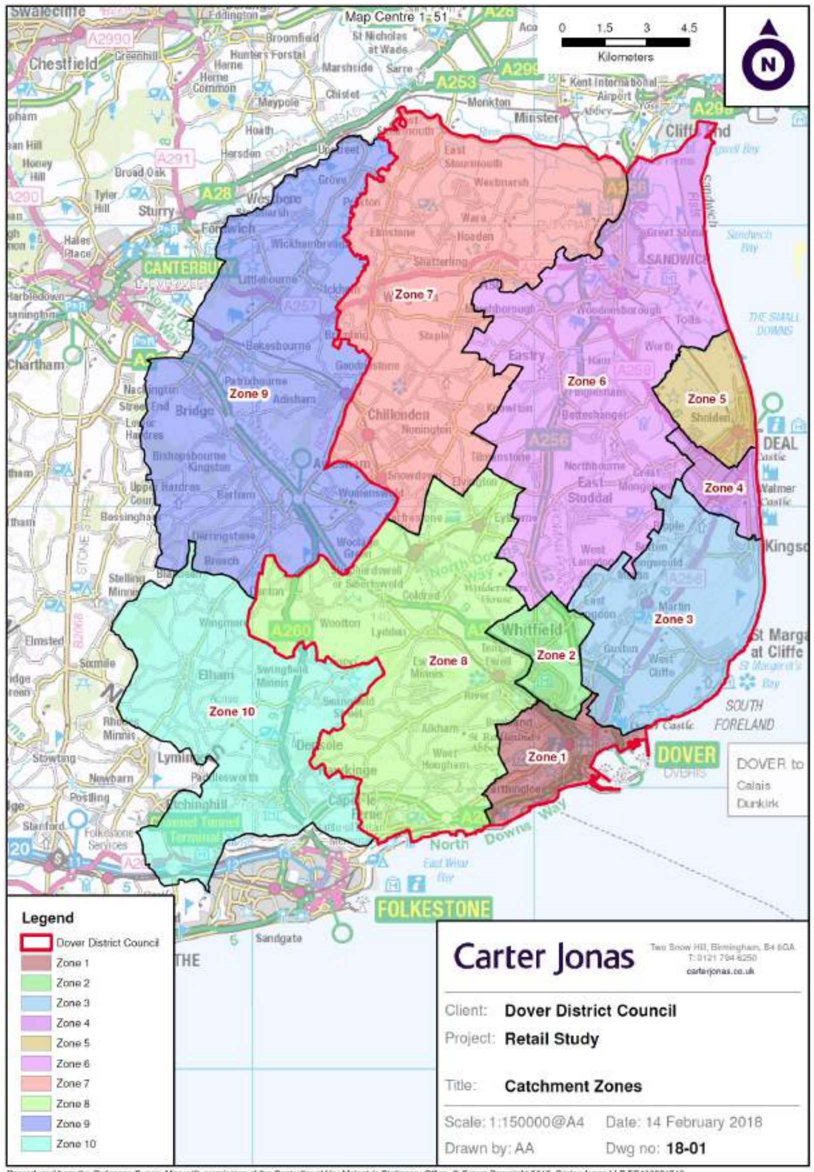
Planning Policy & Retail Trends

4. The review of the extant development plans in the Council area highlights the importance of regeneration particularly with a focus of action on Dover Town Centre. The plans also highlight the importance of the District in the context of Kent and the South East region and the aspiration to nurture its natural and historic assets to help underpin social and economic progress.
5. Existing floorspace in town centres face a myriad of challenges. These will continue to grow over the short, medium and long term. This notwithstanding, for the centres within the District to perform strongly they will need to embrace the new dynamics and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical 'store based' retailing in town centres. Within the District, there will be a need to build in resilience to the changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres.

Market Share

6. The study addresses the requirement of the Council for an updated evidence base in respect of retailing, commercial leisure and town centre uses. To understand the local retail and commercial dynamics a study (catchment) area was defined for the retail and town centre assessment. This is shown in **Figure 1**:

Figure 1: Study Area



7. The study area comprised ten zones based on ward geography. A household telephone interview survey of some 1,000 respondents was carried out across this area.

8. Across the Council area (Zones 1-8) the market share for Special Forms of Trading[1] (SFT) for convenience goods is lower than the national average, which suggests that there is potential for internet food shopping to increase its market share over time. This may reduce the expenditure available to support the need for physical space over the longer term. The comparison` goods market share for SFT has increased markedly from 7.1% in the Council's

[1] Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales.

2012 Study to 23.6%. The latter is an indication of the shifting pattern of consumer behaviour and associated spending that needs to be monitored by way of regular surveys on shopping patterns.

9. Convenience and food stores serving the Council area are achieving an overall market share of 69.5% (with SFT), which represents a good retention rate reflecting the strength and quality of the overall food shopping offer. In contrast, the comparison goods market share (with SFT) for the main centres and stores in the District is lower achieving an overall 29.2%.
10. Comparing the market shares (excluding SFT) from the Council's 2012 Study against the current assessment shows:
    - Convenience goods retention in the District has decreased marginally from 76.3% in 2012 to 73.6% in 2017; and
    - Comparison goods retention in the District has decreased from 45% in 2012 to 38% in 2017.
11. The key focus for the Council is to increase retention and clawback expenditure to its centres. It is anticipated that within Dover Town Centre and the District as a whole the St. James scheme will aid in this process. Over the longer term it is anticipated that a good range of complementary leisure uses, particularly cafés and restaurants, cinema and hotel will create a pleasant shopping environment all of which will contribute to the overall appeal and thereby increase the broader retention from across the Council area.

Healthcheck: Dover

12. The healthcheck has demonstrated that the centre has a rich historic and maritime heritage and it is highly accessible.
13. Currently Dover Town Centre has vacancy rate of around 15.2% which is higher than the national average (11.2%). A large proportion of vacant units are located along Biggin Street, which is the main thoroughfare into the town centre.
14. A high proportion of respondents to the HTIS suggested enhancements to the retail offer as a key improvement for the town centre.
15. The opening of St. James will strengthen the town's critical mass of retail and leisure uses, and improve its overall attraction and market share in the face of increasing competition from existing centres in neighbouring authority areas, out-of-centre retailing and the growing threat of the internet. This development represents a major investment coup in a challenging economic and retail climate. It will be an important catalyst for the wider regeneration and rejuvenation of the centre.
16. Improvements to the Market Square creates the potential for focal point for the town centre from which radiates links the traditional part of Biggin Street, to St. James, the Dover Discovery Centre and the Waterfront. This area represents a spatial asset that can be transformed as part of the wider regeneration of the town centre to raise the visibility, footfall and profile further.
17. Additionally, the proposed transformation of the Waterfront with complementary retail and leisure uses to the town centre will provide the opportunity to create a destination venue for Dover.
18. Dover can capitalise upon a sustainable long term future by addressing the following:
    - **Dover as a destination**: There is a need for better branding, marketing and promotion of the town centre as a destination and to recapture expenditure that is flowing to other centres.
    - **Strong Leadership**: It is essential that with any promotion of the town centre that this is proactively actioned and managed. The appointment for example of a town centre manager will greatly assist in developing partnerships to create a vibrant and distinctive town centre.
    - **Market Square**: An underutilised spatial asset that can be transformed to represent a key focal point for the town centre.
    - **Multi-Purpose**: For the centre to work there needs to be a mix of uses that are complementary to its functioning. Empty space represents opportunities for other types of development such as residential, offices, bars and restaurants as well as other leisure uses.

- **Business rate initiatives**: the Council may want to consider business rate discounts for independents and entrepreneurs.

Healthcheck: Deal

19. Deal in comparison to Dover is a more compact centre. It is a traditional high street, which runs north to south through the town and forms the centre's heart. The historic pattern of the centre lends itself to a limited scale of development for expansion, but notwithstanding this it is nonetheless well thought of by local residents. Deal also has a good level of accessibility.
20. Deal has a low vacancy rate of 5.8%, when compared with the national average of 11.2%. The low rate of vacancy is attributable to the compact nature of the town centre and the blend of national and independent retailers that offer a diverse and attractive retail offer to shoppers.
21. The strategy for the long term should be to proactively and continuously promote the centre as a family leisure destination and capitalise on its historic heritage.

Healthcheck: Sandwich

22. The town centre serves the daily needs of its local residents and is a key tourist attraction. The centre benefits from its proximity to a renowned international golf course - The Royal St George's Golf Club which is one of the courses on The Open Championship rotation.
23. The retail profile of the centre is dominated by independent traders who contribute to the overall diversity, vitality and viability of the centre visit. In terms of representation by multiples this includes Boots, Costa, and the Co-op. The level of vacancy at 5.4% is considerably below that of the national average of 11.2%.
24. As the development potential is limited due to the historic layout of the town centre, the continued vitality and viability of the centre is dependent on active promotion of the centre and on capitalising on the tourism spend associated with the centre's historic medieval heritage and golfing heritage.

Quantitative Needs Assessment

25. The results of the HTIS informed the assessment of the overall quantitative capacity for new (convenience and comparison goods) retail floorspace over the period to 2037. The assessment showed:
    - Convenience goods - there is no forecast District-wide forecast capacity over the plan period to 2037 due to the quantum of existing commitments.
    - Comparison goods - there is no District-wide capacity for new comparison goods floorspace over the short term (to 2022) and medium term (to 2027). By 2032 there is capacity for 615 sqm net, rising to 3,243 sqm net by 2037.
26. The identified forecast capacity/need over the long term should be directed to the main town centres of Dover, Deal and Sandwich first, in accordance with national and local plan policy objectives. The distribution of the forecast need for new retail floorspace should reflect the network and hierarchy of centres, and the relative role and function of these centres.
27. Capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. The Council should also take into account these margins for error when assessing the need for new retail floorspace.
28. It is the case that the capacity forecasts are predicated on the current level of market share. In the context of the District this pattern may change over time based on the new St. James development in Dover Town Centre. The critical mass of development in terms of the scale and quality of new retail and leisure uses should have a positive impact on the town centre's market share from within the defined study area.

Leisure Needs Assessment

29. The results of the HTIS indicate that there is currently an adequate level of leisure facilities (for example food and drink). In the case of Dover its leisure offer will be significantly enhanced by the range and quality of new leisure uses provided as part of the St. James development (including a new cinema, cafés and restaurants). The

regeneration of the Dover Waterfront will also boost the town's wider commercial leisure provision, subject to the provision of strong, safe and convenient pedestrian routes between the waterfront and town centre.

30. In terms of cinema provision, the assessment found that whilst the retention level for cinemas from across the study area is 23.1%, this is likely to increase with the new Cineworld proposed as part of the St. James scheme. Any future market demand from cinema operators should be directed to the District's existing town centres.
31. The total available expenditure for food and drink in the Council area is set to increase by £47.3m (37.7%) over the period to 2037. There is no identified capacity in the short term after accounting for the A3/A4 floorspace proposed as part of the St. James scheme. The growth in expenditure results in the potential floorspace capacity in the long term of between 2,191 sqm gross and 5,438 sqm gross by 2037. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity they bring to the town centres.
32. In terms of addressing future needs, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.
33. The Council area benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. The Council also needs to build a marketing campaign around its golfing heritage that will benefit not only Sandwich but the District as a whole.

Frontages

34. Our broad conclusions by centre are detailed below:

- **Dover Town Centre**: Regarding the Town Centre Boundary ('TCB') it is considered to be broadly accurate. It is suggested that the TCB should include the area encompassing the existing Dover Leisure Centre which will aid in promoting complementary town centre uses with the adjacent St. James' scheme. In broad terms, the Primary Shopping Area for Dover town centre is currently situated around Cannon and Biggin Street. In our judgement this is likely to shift southwards to include the St. James' development, as it will inevitably contribute to the critical mass of retail provision within the centre. It is a further contributing reason for a PSF designation of the scheme.
- **Deal Town Centre**: We have put forward two options for extending the current TCB in the north to include High Street/Oak Street intersection up to the High Street/New Street intersection. Should the TCB boundary be extended then the area along the High Street/ Oak Street intersection up to the High Street / New Street intersection should be designated as an SSF. This additional area overall has a diversity of retail and commercial leisure provision that constitute as town centre uses under the current NPPF. The PSA for Deal Town Centre is the agglomeration of retail units along the PSF.
- **Sandwich Town Centre**: We consider both the TCB and SSF designation to be adequate.

1. INTRODUCTION

1.1 Carter Jonas ('CJ') was commissioned by Dover District Council (the 'Council') to produce a *Retail and Town Centre Needs Assessment* ('RTCNA') to help inform both plan-making and development management decisions across the local authority area. The findings of the study will specifically provide the robust evidence base required to help inform the preparation of the emerging local plan and update the findings identified in the 2012 Dover District Council: Retail Study Update ('2012 RSU').

1.2 The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the National Planning Practice Guidance (PPG), published in March 2014, which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. The sequential and impact 'tests' are also key to both plan-making and decision-taking at the local level.

1.3 The assessment of the need (or 'capacity') for new retail (convenience and comparison goods) floorspace has been carried out at the strategic District-wide level to help inform the likely scale, type, location and phasing of new retail development over the short (to 2022), medium (to 2027) and long term (to 2037).

1.4 The study/catchment area defined for the purpose of this study principally covers the local authority area, but also extends to a wider area incorporating parts of neighbouring local planning authority areas (**Appendix 1**).

1.5 The defined study area and zones provide the framework for the new telephone interview survey of some 1,000 households conducted by NEMS Market Research (NEMS) in June 2017. The full (weighted) survey results are set out in **Appendix 4**. The survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the study area. The survey findings have also informed the health check assessments for the main study centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace and leisure uses.

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

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

1.8 **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.

1.9 **Section 4** sets out the results of the market share analysis for convenience and comparison goods shopping and leisure use across the study area based on the household telephone interview survey (HTIS). The market share tabulations for convenience and comparison goods are set out in **Appendix 5** and **Appendix 6** respectively.

1.10 **Sections 5-9** set out the health check methodology and key findings for the Council's main town centres of Dover, Deal and Sandwich. These assessments draw on the indicators identified by PPG, recent research and the latest town centre audits for the centres based on site visits. The health check assessment also takes account of the results of the household survey.

1.11 **Section 10** sets out the key assumptions and outputs of CJ's in-house CREAT^{e} (excel-based) capacity model, including: (i) the forecast population and expenditure available in the study area (**Appendices 2** and **3**); (ii) the forecast convenience (**Appendix 7**) and comparison (**Appendix 8**) turnovers of all existing centres/stores; and (iii) the forecast trading characteristics of all known committed retail floorspace at the time of preparing this assessment and the detailed District-wide and main centre capacity forecasts for both convenience (**Appendix 9**) and comparison goods (**Appendix 10**).

1.12 **Section 11** sets out the findings of the commercial leisure and other town centre uses 'gap' assessment. This looks at the main leisure uses, including the need for new food and beverage uses, cinema and gyms.

1.13 **Section 12** provides recommendations on the extent of the existing Primary Shopping Frontages (PSFs) and Secondary Shopping Frontages (SSFs) in the District's main centres Dover, Deal and Sandwich.

1.14 Finally, **Section 13** provides high level advice on how Council can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2037.

1.15 When considering and assessing the findings of this retail assessment it is important to understand at the outset that capacity forecasts beyond a five year (short-term) time period should be interpreted with caution by the Council, applicants and any other person/organisation using the information, as they are subject to increasing margins of error. We therefore advise that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be updated to take into account any significant new retail development and changes in the retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail and leisure sectors (such as, the growth in internet shopping) and commercial leisure sectors.

2. PLANNING POLICY OVERVIEW

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other material considerations.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans and Neighbourhood Plans. At the heart of the NPPF is a presumption in favour of sustainable development, which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level.

2.3 For plan-making the Framework states that Local Planning Authorities (LPAs) should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *"…it is* clear *that development which is sustainable can be approved without delay"*.

2.4 The NPPF (paragraph 17) sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

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

2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements: plan positively for the development and infrastructure required in the area; be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date; and allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate.

2.7 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on "…*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*" (paragraph 158). Furthermore the assessment of and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action.

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

2.9 The Framework (paragraphs 18-149) sets out thirteen key 'principles' for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment.

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

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites to meet the scale and type of retail and leisure development needed in town centres;
- ensure that the needs for retail and leisure are "*met in full*" and *"not compromised by limited site availability*". Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge-of-centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

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

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

- Require an **impact assessment** if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). The NPPF (paragraph 26) states that this should include assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.

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

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

NPPF CONSULTATION DRAFT 2018

2.14 At the time of finalising this report, a draft version of the NPPF was brought out for consultation. Whilst the Government's draft revised Framework is very much focussed on the delivery of more homes, there are some important proposed changes to policy aimed at *'ensuring the vitality of town centres*'.

2.15 The draft Framework recognises that where centres are in decline then policies and measures should be promoted that support diversification and changes of use (paragraph 86g). This policy is clearly responding to the fact that town centres and high streets are now facing possibly the most significant challenges to their roles and functions in generations. The challenge for local authorities, developers, investors and landlords is how to effectively plan, fund, manage and promote the future of town centres, when retail is no longer the key driver of their vitality and viability.

LOCAL PLANNING POLICY CONTEXT

2.16 The Development Plans in Dover comprises of the following documents:

- Dover District Core Strategy (2010)
- Dover District Land Allocations Local Plan (2015)
- Dover District Local Plan Saved Policies (2002)
- Dover Economic Development Needs Assessment Report (2017)
- Strategic Housing Market Assessment (2017)
- Dover Western Heights Masterplan (2015)
- Whitfield Urban Expansion Supplementary Planning Document (2011)
- St James Brief Masterplan (2002)
- Aylesham Masterplan (2005)

2.17 A high level review of these documents follows below.

Dover District Core Strategy (2010)

2.18 The *Dover District Core Strategy* (DDCS 2010) sets out the overall strategic vision up to 2026 along with the issues to be addressed over the plan period including the Council's approach to affordable housing, employment land, community facilities and the broad location of new housing. The document is also used alongside other Local Plan documents to make decisions on planning applications. Policies for retail and town centre uses include:

- **Policy DM 22** (Shopping Frontages) sets out the types of permittable uses in the primary shopping area – *'Within the ground floor of premises in the Dover and Deal primary shopping frontages planning permission will only be given for A1, A3 and A4 uses. Within the ground floor of premises in the Dover, Deal and Sandwich secondary shopping frontages planning permission will only be given for A1, A2, A3, A4 and A5 uses'*.
- **Policy DM 23** (Local Shops) relates to where local shops would be permitted – '*Proposals for local shops or extensions to local shops will be permitted: (i) within the urban areas and in rural settlements where consistent with the Settlement Hierarchy; and (ii) on development sites for employment uses'.*
- **Policy DM 24** (Retention of Rural Shops and Pubs) – '*Planning permission will only be granted for the change of use of a rural shop or pub if its loss would not harm the economic and social viability of the community that it serves or, if such harm would occur, it has been adequately demonstrated that the use is no longer commercially viable and genuine and adequate attempts to market the premises for retail purposes or as a pub (as appropriate) have failed'.*

2.19 The Core Strategy also sets out the Settlement Hierarchy under **Policy CP 1** under which the location and scale of development in the District must comply. The Settlement Hierarchy is defined as follows:

- Secondary Regional Centre - Dover (including the built-up parts of the parishes of River, Temple Ewell and Whitfield)
- District Centre – Deal (including the built-up parts of the parishes of Sholden, Walmer and Great Mongeham)
- Rural Service Centre – Sandwich (Aylesham is proposed as a rural service centre).
- Local Centre – Ash, Capel-le-Ferne, Eastry, Shepherdswell and Wingham
- Village - Alkham, East; Langdon, East; Studdal, Elvington, Eythorne, Goodnestone, Kingsdown, Great Mongeham, Lydden, Nonington, Preston, Ringwould, Ripple, St. Margaret's, Staple, West Hougham, Woodnesborough and Worth.
- Hamlet – relates to all other settlements in the rural area.

2.20 Other relevant policies include:

- **Policy CP8** - Dover Waterfront. The site is allocated for a mixed use scheme including retail (A1 uses up to 20,000 square metres floorspace), restaurants, cafés and drinking establishments (A3 and A4 uses up to 7,000 square metres), assembly and leisure (D2 uses up to 15,000 sqm), residential (C3 use of at least 300homes), offices (B1) and hotel (C1) uses.
- **Policy CP9** - Dover Mid Town. The area is allocated for mixed use development of C2 uses (residential institutions), C3 uses (residential of at least 100 homes), A1 shop uses, A3 restaurants and cafés uses and A4 Drinking establishments uses (of up to 15,000 sqm), D1 (non-residential institutions), the redevelopment of South Kent College (around 5,000 square metres), and parking to serve the development and the town centre
- **Policy CP11** – On the managed expansion of Whitfield. The site is allocated for an expansion of Whitfield comprising at least 5,750 homes supported by transport, primary education, primary health and social

care, utility services and green infrastructure together with retail, financial and professional offices, eating and drinking establishments (Use Classes A1 to A5).

Dover District Land Allocations Local Plan (2015)

2.21 The *Land Allocations Local Plan* ('LALP') identifies and allocates specific sites that are suitable for development in order to meet the Core Strategy's requirements and in so doing makes a major contribution to delivering the Strategy. The primary purpose of this document is to allocate land for development and to set out any issues or criteria that subsequent planning applications will need to address.

2.22 The site allocations are detailed on a settlement basis, starting with Dover as the major focus for development. Deal and then Sandwich are the next main centres for development in the rural areas, before considering Local Centres and Villages.

2.23 In terms of the location for retail development, for the Dover trade area, the Core Strategy's substantial allocations are more than adequate to accommodate the likely amount of demand for additional floorspace identified in the Council's 2012 RSU.

2.24 In the Deal/Sandwich trade area most of the potential for additional convenience floorspace is directed to Sandwich. This will help to increase the quantity and quality of convenience floorspace provision to help broaden the centre's range and choice to the benefit of local catchment population (Para 2.14).

2.25 The potential for additional comparison shopping floorspace arises mainly in Deal where there is opportunity to improve the range and choice of the town's offer and help retain a higher level of expenditure. Opportunities for redevelopment in the town centre are, however, limited by the historic environment. The Council has been unable to identify a suitable site within the town centre or on the edge-of-centre to meet this need (Para 2.15). In the absence of the Council selecting a suitable site for comparison goods floorspace at Deal, a Development Management Policy is included in Annex 1 (Policy DM26) (Para 2.16).

2.26 The priority sites for employment allocations are summarised in **Table 2.1** below:

Table 2.1: Land Allocations Local Plan: Priority Sites for Employment Allocations

Site	Location	Use	Amount of floorspace (sq m)	Policy reference
St. James's Area	Dover	Retail	10,500	Saved Local Plan Policy AS9
White Cliffs Business Park	Dover	Focus on B1/B2/B8	53,000 in addition to unimplemented planning consents of 71,800	Dover - Policy LA2
Albert Road	Deal	B1/B2	4,550	Saved Local Plan Policy LE5
Aylesham Development Area (employment allocation)	Aylesham	B1/B2	8,000	Saved Local Plan Policy AY4
Betteshanger Colliery Pithead	Deal	B1/B2/B8	22,000	Saved Local Plan Policy AS1
Eastry Hospital	Eastry	B1 and employment generating uses	2,000	Rural - Policy LA29
Tilmanstone Spoil Tip (North)	Deal	B2	1,350	Saved Local Plan Policy LE10

Source: Land Allocations Local Plan Adopted 2015 (page 20-21)

2.27 In addition to the above there is the *Discovery Park Enterprise Zone* ('DPEZ') which was established in 2011. This was formerly Pfizer's Research and Development facility, at Sandwich and has an established employment function. It is the largest employment site in the District and comprises around 280,000 sqm of high quality research and development buildings, offices and ancillary facilities set within a landscaped campus. Having achieved Enterprise Zone status in 2011, the site offers business rate discounts, has the potential for improved superfast broadband and future capital allowances to investors and occupiers on site. DPEZ is being marketed towards life sciences, Research and Development (R&D) and business start-ups whilst the White Cliffs Business Park ('WCBP') continues to be restricted to B1/B2/B8 uses and other employment generating uses.

2.28 Key retail and leisure policies emanating from this Plan that relate to Dover, Deal and Sandwich include:

- **Policy LA2** - White Cliffs Business Park: provides (inter alia) development is for Use Classes B1/B2/B8, and employment generating uses that are not specified in the Use Classes Order;
- **Policy LA 17** - Land adjacent to the Sandwich Technology School, Deal Road, Sandwich: The site is allocated for residential development with an estimated capacity of 60 dwellings and the expansion of the Sandwich Sports and Leisure Centre;
- **Policy LA 18** – Sandwich Town Centre: Planning permission will only be given for A1, A2, A3, A4 and A5 uses within the ground floor premises in the designated Sandwich Secondary Shopping Frontage. Elsewhere in the Sandwich Town Centre and the designated Primary Shopping Area planning permission will only be given for the conversion of ground floor premises from Main Town Centre and A2 uses if it has been adequately demonstrated that the use is no longer commercially viable and genuine and adequate attempts to market.
- **Policy LA 18** – New Convenience Retail Provision in Sandwich: Planning permission for new convenience provision in Sandwich will be permitted provided that proposals (i) follow the sequential approach for main town centre uses as set out in the NPPF and PPG; (ii) include an assessment of the impact of the proposed development on Sandwich town centre and any other relevant town centres,

relating to the scale and the type of development proposed in compliance with national policy and guidance; (iii) demonstrate that the site is in an accessible location and well connected to the town centre that would encourage people to walk, cycle and use public transport, in order to maximise the benefits of linked trips; (iv) respond to the local character, identity, the historic assets and setting of Sandwich; (v) the visual impact of any car parking is reduced by a combination of its location and appropriate landscaping; and (vi) demonstrate the access arrangements and the service yard are located in a position that protects the residential amenity.

Dover District Local Plan Saved Policies (2002)

2.29 The *Dover District Local Plan* was adopted in 2002. Whilst the majority of the Local Plan policies have been replaced by the Core Strategy (2010) and Land Allocations Local Plan (2015), some of the policies remain 'saved', and continue to form part of the Development Plan. The key saved policy pertaining to retail is **Policy SP9** (Sandwich Town Centre Frontages) which states that within the Sandwich Town Centre Frontages (shown on the Sandwich Inset of the Proposals Map) only uses in Use Classes A1, A2, and A3 will be permitted in ground floor premises.

Dover Economic Development Needs Assessment Report (2017)

2.30 The *Economic Development Needs Assessment* ('EDNA 2017') seeks to assess the evidence and need for economic development in Dover to 2037.

2.31 The economic forecasts indicate a total employment growth of 2,700 jobs in Dover between 2016 and 2037 with 1,700 of these jobs forecast to be created in the District by 2026. (Para 5.10). These economic forecasts indicate that the level of employment within Dover will not recover to the 2006 level by either 2026 or 2037, with only modest growth forecast over the study period. They do however imply a positive trajectory of overall job growth in Dover over the 21 year study period to 2037, which is in contrast to recent trends of ongoing job losses sustained across the District. (Para 7.8).

2.32 The study also suggests that the District's sites would benefit from greater clarity in planning policy terms and a clearer strategy to guide development going forward. This is especially applicable to White Cliffs Business Park (where the original B-class concept for the site has become diluted by development of other uses) and would also provide an opportunity to clarify the role that regeneration areas such as Dover Town Centre or existing sites such as Coombe Valley are expected to play in accommodating employment uses in future (Para 7.11).

2.33 The study also recommends that an economic strategy is developed for Dover which clearly establishes the Council's aspirations and vision for economic growth both in overall terms and for particular areas / key sites. This would provide the opportunity to promote a stronger economic narrative and plan, and make the case for further investment and funding to unlock key sites and guide future development in the District, particularly in the absence of a strong 'quantitative case'. This could include a particular focus upon wider 'place making' priorities; creating attractive places to live and work through revitalising the existing built environment and creating new spaces. Particularly relevant to this priority is the regeneration of Dover Town Centre, where significant scope exists to enhance the quality of its urban space and public realm (Para 7.18).

Strategic Housing Market Assessment (2017)

2.34 This study identifies an *Objectively Assessed Need* (OAN) for Dover District. Of relevance to this RTCNA is that the population for the District as a whole is projected to increase from 113,066 in 2014 to 127,242 in 2037 (Table 5.2). This represents an overall increase of 12.5% (0.51% per annum) or an increase of 616 person's annum over the period to 2014 to 2037[2]. The OAN for Dover district is 529 dwellings per annum (dpa) over the period 2014-37 representing some 12,176 dwellings (Para. 8.18)

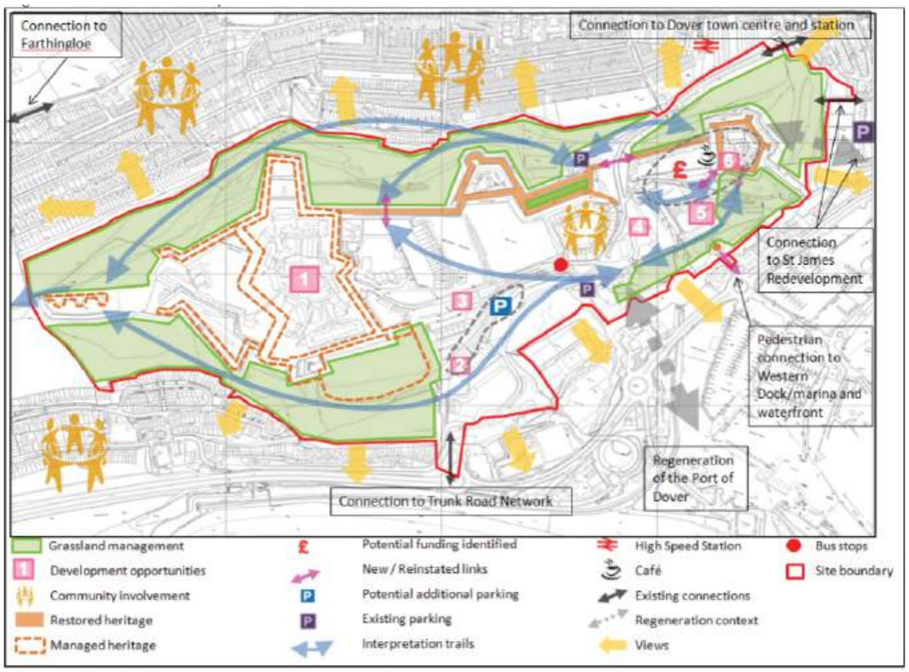
The Dover Western Heights Masterplan (2015)

2.35 The Dover Western Heights Masterplan is a Supplementary Planning Document (SPD) to Policy LA11 in the Dover District Land Allocations Local Plan (adopted 2015) that states:

> "The Council will establish a comprehensive framework for the conservation management of the Dover Western Heights Fortifications Scheduled Monument and Conservation Area. The framework will take the form of a masterplan to be adopted as a Supplementary Planning Document."

2.36 The Masterplan recognises that Western Heights has a crucial role to play in the town's regeneration agenda, not only individually, but also in combination with adjacent areas. (Para 2.22).

Figure 2.1: The Dover Western Heights Masterplan Model



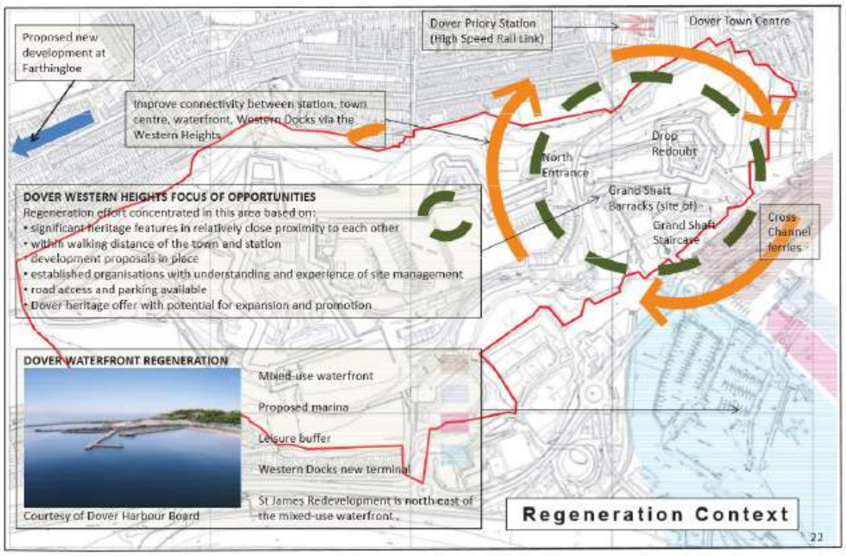
Source: The Dover Western Heights Masterplan (page 29)

2.37 The Masterplan has a regeneration focus. On this, the Dover Harbour Board is proposing the redevelopment of the Western Docks consisting of a new multi-user cargo terminal as well as a new marina. Between the terminal and the waterfront, a buffer area would support leisure uses. In turn, the new terminal development would allow new and enlarged capacity for ferry and cruise passengers at new berths at the Eastern Docks. This would provide a catalyst for the revival of the adjacent Dover Waterfront, which is identified by Dover District Council as a key element in the wider transformation agenda for the town (Para(s) 4.7 & 4.8).

2.38 The Waterfront has the potential to become a strong visitor attraction of regional significance, offering residential, hotel and conference facilities, restaurants and bars, retail, commercial and tourism and leisure uses (Para 4.9). The Masterplan recognises that the size, complexity and condition of the site as well as the multiplicity of interests involved will inevitably result in an extended timescale for its full achievement.

[2] This is based on Carter Jonas' analysis of the SHMA population projections.

Figure 2.2: The Dover Western Heights Masterplan: Regeneration Area



Source: The Dover Western Heights Masterplan (page 34)

Whitfield Urban Expansion Supplementary Planning Document (2011)

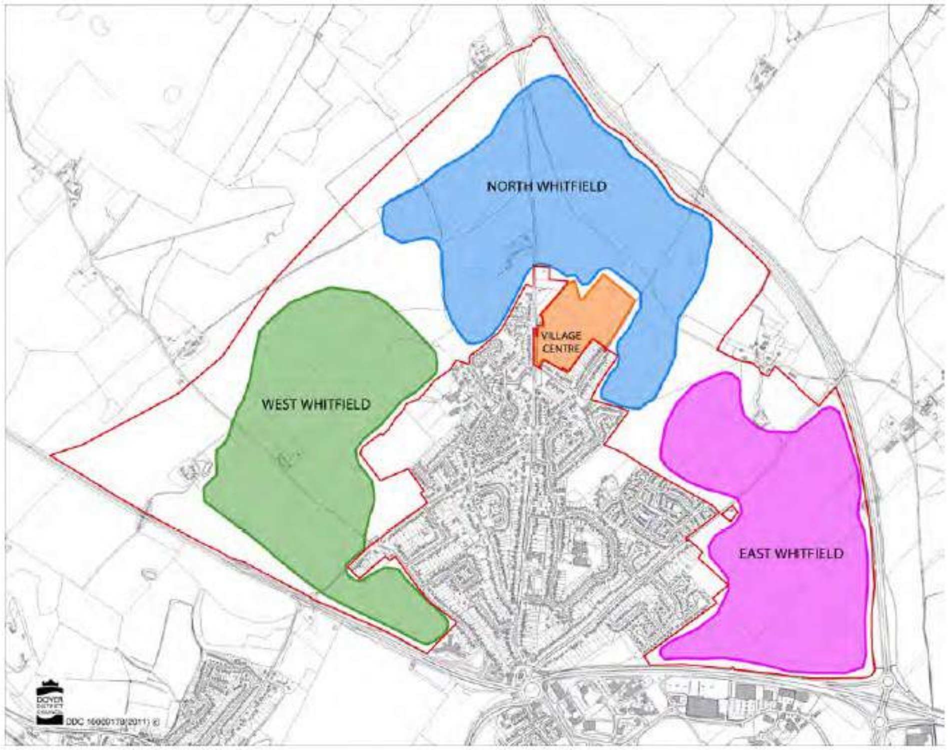
2.39 The *Whitfield Urban Expansion* (WUE) is a Supplementary Planning Document (SPD) to Policy CP11 in the Dover District Core Strategy (2010) that states:

> *"The site to the west, north and east of Whitfield is allocated for an expansion of Whitfield comprising at least 5,750 homes supported by transport, primary health and social care, utility services and green infrastructure together with retail, financial and professional offices, eating and drinking establishments (use Classes A1 to A5)."*

2.40 Policy CP11 of the Core Strategy sets out the requirements for the development and includes the provision for the inclusion of commercial facilities and services such as shops, offices, cafes and restaurants that fall within Use Classes A1 to A5. It is states that such facilities should be of a scale to support that expansion and existing facilities (Para 5.78)

2.41 The proposed development is based on the division in to three main Development areas. These are referred to as Western, Northern and Eastern Development areas as shown in **Figure 2.3:**

Figure 2.3: Whitfield Urban Expansion: Development Areas



Source: Whitfield Urban Expansion Supplementary Planning Document (2011) (Page 30)

2.42 The Concept Masterplan shows the WUE to comprise three main development areas set in a framework of green infrastructure. Each of these areas is supported by its own primary school, energy centre and local centre and each area is sub-divided into two neighbourhoods giving a total of six (**Figure 2.4**) across the WUE as detailed below:

- Light Hill;
- Parsonage Whitfield;
- Shepherd's Cross;
- Napchester Whitfield;
- Lenacre Whitfield and
- Temple Whitfield.

2.43 The Core Strategy envisages that the development programme to be completed post 2026. If 240 homes were delivered per year the development would take until 2039 to complete (Para 6.4).

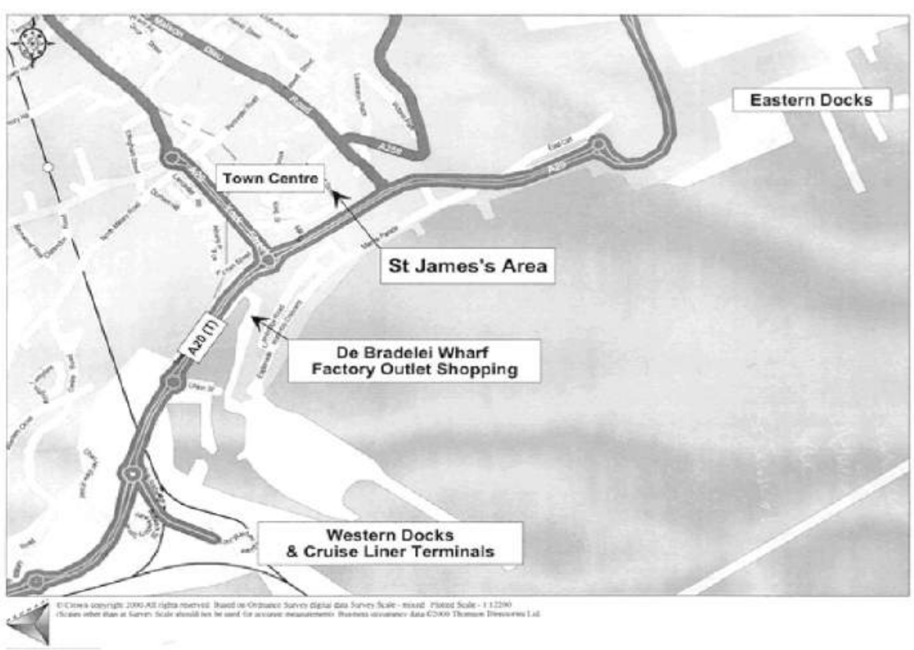
Figure 2.4: Whitfield Urban Expansion: Concept Masterplan

Source: Whitfield Urban Expansion Supplementary Planning Document (2011) (Page 45)

St James Brief Masterplan (2002)

2.44 The Planning Brief was prepared by the Council to promote the appropriate development of the site for the regeneration of the St James Area and the town centre as a whole (**Figure 2.5**). It represents an opportunity for large scale redevelopment in the town centre and lies adjacent to the A20, which is the main road to Europe's busiest port. The site covers an area of approximately 3.2 ha (7.9 acres).

Figure 2.5: St James' Area: Location Plan



Source: St James' Area, Dover – Planning Brief (July 2002)

2.45 The broad planning objectives of the Brief include:

- Comprehensive regeneration of this “brownfield” site, thereby bringing a site of strategic importance back into full and effective use;
- Provision of a suitable mixed use scheme which will reinforce the role of the town centre and contribute to its vitality;
- Secure environmental enhancements through high quality design of new buildings and landscaping treatment; and
- Secure townscape improvements of this highly visible location which reinforce this entrance to the town centre and enhance linkages between the core shopping area, sea front and neighbouring retail and tourism facilities (Para 2.2).

2.46 The site is in multiple ownership and therefore the achievement of comprehensive redevelopment has been dependent on site assembly and the relocation of existing uses.

2.47 In terms of orientation, the site lies immediately to the east of the southern part of the principal retail area of the town. Its development should assist the regeneration of the commercial heart of Dover and in this context it must provide complementary uses and create links between the site and Cannon Street/King Street/Bench Street and the Market Square (Para 4.1).

2.48 The Planning Brief envisages the following potential categories of use that could be accommodated on to the site:

- Retail – food and non-food uses that complement the existing town centre retail provision within the context of a mixed use development;
- Leisure – various uses including cinemas, restaurants, pubs, family entertainment, health and fitness, and other quality operations that complement the existing facilities;
- Housing – a mix of housing types, including private and affordable housing, available for sale or to rent; and
- Offices – a combination of traditional offices and studios/workspace (Para 4.6).

2.49 It should be noted that at the time of writing this report substantial progress has been made on the Dover St. James’ site. The site is nearing completion (at the time of finalising this report) and comprises some 7,473 sqm gross of modern retail and leisure (App. Ref: 13/00107). Tenants at the scheme include: Marks & Spencer, Next, Nandos & Benny, Travelodge, Cineworld, Next and Anytime Fitness amongst others (detailed later).

Aylesham Masterplan (2005)

2.50 Aylesham was identified as a strategic development opportunity site in the Dover District Local Plan 2002. The Aylesham Masterplan was adopted as a Supplementary Planning Guidance (SPG) in 2004.

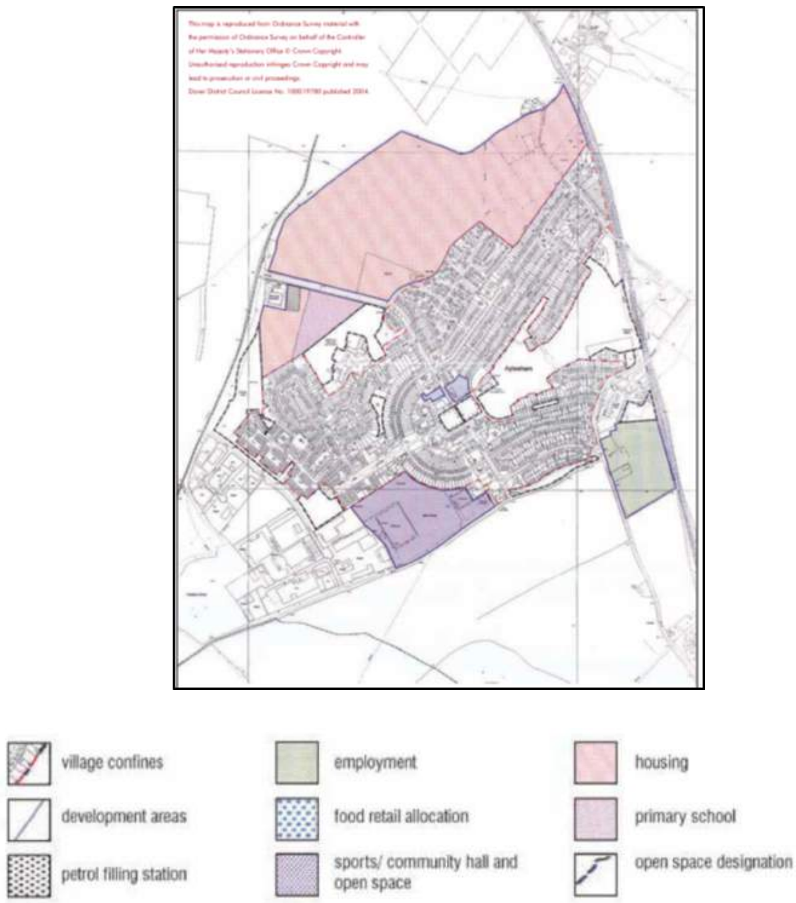
2.51 The Masterplan sets out the preliminary design codes that relate to the expansion of the village of Aylesham. The broad aspiration is to regenerate and expand the village to provide a seamless integration of new and existing uses, creating a strong and vibrant community centred on walkable, interconnected and sustainable neighbourhoods.

2.52 The Masterplan (**Figure 2.6**) envisages a variety of residential, commercial, employment, educational, recreational and community uses. The key components of the Plan include, *inter alia*:

- 1,100 new homes;

- A new (or improved) foodstore;
- Upgrading of Market Square and existing shops;
- Employment space comprising small business units;
- a new primary care facility;
- improvements to the existing highway network;
- a new pedestrian/cycle link from the station to Market Square; and
- two new neighbourhood parks.

Figure 2.6: Aylesham Masterplan: Local Plan Designations



Source: Aylesham Masterplan (July 2002) (Page 7)

2.53 The employment allocation identified for Aylesham development Area under the Dover District Local Plan (2002), is to provide both B1 (over 2.15ha gross area) uses, with a total 4.3ha gross area (3.44ha net) and this is anticipated to provide a total of 10,400 sqm of employment space.

SUMMARY

2.54 The review of the extant development plans in the Council area highlights the importance of regeneration particularly with a focus of action on Dover Town Centre. The plans also highlight the importance of the District in the context of Kent and the South East region and the aspiration to nurture its natural and historic assets to help underpin social and economic progress.

2.55 The underlying objective of both the NPPF and Local Plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations "first". This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping (discussed further in **Section 3**).

2.56 Notwithstanding the town centre first policy, this does not rule out edge-of-centre development where identified needs cannot be met in existing Primary Shopping Areas (PSAs). Indeed the NPPF (paragraph 23) encourages LPAs to assess the potential to expand town centres to ensure a sufficient supply of suitable sites. If edge of centre sites cannot be identified to meet the identified needs "in full", then LPAs are required by the NPPF to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre, subject to an assessment of the impact of any proposed retail and town centre uses on the vitality and viability of existing centres.

2.57 In the context of this study the Council's policies provide a context to maintaining and enhancing town centres. For the future, this has to be set in context with the dynamics of the retail economy (**Section 3**) and planning policy.

3. NATIONAL RETAIL AND TOWN CENTRE TRENDS

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

RETAIL TRENDS

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

3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to around 2% in 2015 and 2016 against the backdrop of a weaker global economy and further uncertainty on financial markets. The Brexit vote and subsequent triggering of Article 50 is likely to further dampen business/consumer confidence and the prospects for new investment and growth in the near future. Indeed, over the last 12 months the UK has shifted from being one of the fastest growing G7 economies to among the slowest. Against this background of economic and political uncertainty, Experian Business Strategies project lower GDP growth of around +1.5% in 2017 and 2018.

3.4 This dampening in economic growth is also impacting on household income and spending, and ultimately retail sales. The combination of higher inflation, a decline in real wages, a rise in interest rates and a tightening of consumer credit will continue to place a drag on real incomes and consumer spending. Experian forecast that retail sales growth will average 1% in 2018 and 1.9% in 2019.

3.5 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest Retail Planner Briefing Note 15 ('Briefing Note') published in December 2017. This is based on their 'central forecast scenario' which assumes annual growth in GDP averaging 2% from 2016 to 2035.

Table 3.1 Forecast year-on-year growth in retail expenditure per capita

Volume Growth per head (%):	----------ACTUAL GROWTH---------									HISTORIC TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	1997-07	1997-16
Total Retail Spend	**2**	**-2.8**	**0.7**	**-1.1**	**1.3**	**1.9**	**2.1**	**2.8**	**3.5**	**5.4**	**3.5**
Convenience	-4.2	-4.2	-0.6	-3.3	-0.2	-0.3	-0.3	-1	1	0	-0.6
Comparison	4.4	-2.9	1.4	0.1	2.3	3.5	3.6	5.2	5	8.3	5.6

Source: Experian Retail Planner Briefing Note 15 (December 2017); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2016.

3.6 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels between 2008 and 2015. Although there was positive growth of +1% in 2016, the forecasts show a return to no or negative growth over the period 2017 to 2019, with limited growth of +0.1% thereafter up to 2036. The forecast growth rates compare with previous historic trends of no growth between 1997 and 2007, and negative growth of -0.6% over the long term, between 1997 and 2016.

3.7 For comparison goods the Experian data indicates that annual growth rates are recovering from a low of -2.9% in 2009, to a peak of +5.2% in 2015 and +5% in 2016. However, for the reasons set out above, Experian forecast a dampening in growth in the immediate post-Brexit period; to +2.3% in 2017, +0.9% in 2018 and +2.1% in 2019. Thereafter, comparison spend growth is forecast to average circa +3.2% between 2020 and 2036. Despite the growth forecast by Experian, it is clear that comparison goods growth rates are well below historic trends of +8.3% per annum for the period 1997 to 2007.

3.8 Any further dampening of growth rates over the medium to long term could have implications for the viability of existing retail businesses and the take-up of new space, as well the need ('capacity') for new retail floorspace over the forecast period. This needs to be taken into account when assessing and reviewing the capacity forecasts for new convenience and comparison goods floorspace set out in this report.

SPECIAL FORMS OF TRADING AND INTERNET SHOPPING

3.9 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of Special Forms of Trading (SFT)[3]. Based on ONS data, Experian Business Strategies (EBS) estimate that:

- The value of internet sales in 2017 is estimated to be £55.1bn (at current prices). This represents a +31% increase from £42.1bn in 2015 and a +13% increase from £48.9bn recorded in 2016.
- The value of other (non-internet) SFT sales (e.g. mail order, vending machines, market stalls, etc.) is estimated to be £8.8bn in 2017. This represents a more modest growth from circa £8.5bn in 2016 and £7.9bn in 2015.
- Total non-store retail sales are therefore estimated to amount to some £63.9bn in 2017. This represents a 28% growth in sales from £50bn in 2015 a substantial increase from £17.1bn recorded in 2006.
- The overall market share of SFT, as a proportion of total retail sales, has increased nationally from 5.4% in 2006 to 16.5% in 2017. It is forecast by Experian to grow to 19.3% by 2021 and to 22.5% by 2036 (see table below).

3.10 Total SFT sales therefore amount to some £57.4bn in 2016. This represent a 14.8% increase from £50bn in 2015 and a substantial increase from £17.1bn recorded in 2006. The overall market share of SFT (as a proportion of total retail sales) has increased nationally from 5.5% in 2006 to 14.9% in 2016, and is forecast by Experian to increase to 19.7% by 2026 and 20.7% by 2033 (see table below)[4].

Table 3.2 SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	**16.5%**	**19.3%**	**20.9%**	**22.1%**	**22.5%**
Comparison	19.7%	22.5%	23.4%	23.8%	24.0%
Convenience	10.8%	13.1%	15.5%	17.2%	17.8%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

[3] Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).
[4] Such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has produced revised forecasts to reflect the proportion of internet sales sourced from existing stores.

3.11 This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.

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

Table 3.3 Revised forecast growth in SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	**10.6%**	**12.4%**	**13.6%**	**14.5%**	**14.9%**
Comparison	14.8%	16.9%	17.5%	17.9%	18.0%
Convenience	3.2%	3.9%	4.6%	5.2%	5.3%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

3.13 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV and GAME stores across the UK, and the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping across the defined study area and zones (see **Section 4**).

3.14 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a 'digital divide' between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's high street communities. Yet the success of firms at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.

3.15 Notwithstanding the clear and present impact of the digital revolution on how people shop and 'play', some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient 'click and collect' facilities to help drive footfall; whereby customers can browse and order a product on-line, and then collect it from a local store at their convenience. According to research by NEMS Market Research[5], 48% of online shoppers have at some point made 'click & collect' purchases (i.e. bought or ordered goods online, but then collected the goods themselves). This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its 'click & collect' service account for circa one-third of the company's total turnover. Amazon also has an agreement with the Co-

[5] Usage of Click & Collect by internet shoppers. NEMS Market Research (2016)

operative and Morrisons to locate self-service lockers in local stores. According to research by NEMS Market Research Ltd, a wide range of retailers are rated positively in terms of having a good 'click and collect' service, but a few stand out. For example Argos was rated positively by a third of the people who have used a 'click & collect', followed by Tesco (27% rated its service as good), ASDA (15%), John Lewis (13%) and Marks & Spencer (7%). The only 'pure' online retailer that was rated highly was Amazon (7%).

3.16 Further to this is the potential for 'showrooms' on the high street, where customers can view and test products in-store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of some town centres over time, and help drive the demand for retail space from non-traditional retailers.

FLOORSPACE 'PRODUCTIVITY' GROWTH

3.17 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as, for example, rents, rates, service charges and staff costs) to help maintain their profitability and viability. Practically, this is achieved by increasing the amount of sales (revenue) within a given retailer's available floorspace (measured in square feet or metres).

3.18 It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

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

Table 3.4 Forecast 'productivity' growth rates

	2014	2015	2016	2017	2021	2026	2020-24	2025-36
Comparison	-2.0%	-1.2%	0.7%	-0.1%	-0.1%	-0.2%	0.0%	0.1%
Convenience	5.4%	5.3%	4.3%	1.3%	0.9%	1.8%	2.3%	2.2%

Source: Figures 4a and 4b, Experian Retail Planner Briefing Note 15 (December 2017)

3.20 The forecasts show that the scope for sales density growth is limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock following the shelving of major foodstore expansion programmes by the leading national grocers (i.e. Tesco, Waitrose, Sainsbury's, Morrisons and Asda). Notwithstanding this, the turnover densities of existing foodstores in strong trading locations will inevitably be driven upwards where they are serving catchments that are forecast to benefit from strong population and expenditure growth over the short, medium and long term, and particularly where there is limited or no addition to the floorspace stock.

3.21 For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of over +2.3% per annum over the next 15-20 years. However, this is still well below the rate seen during the boom of the early years of this century.

3.22 The floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in **Section 10** of this study. It should be noted however that we consider that existing retailers and floorspace will have the potential to achieve higher annual revenue growth rates to absorb increasing costs in order to remain viable, and this is especially the case where opportunities for additional new floorspace is limited.

CHANGING RETAILER REQUIREMENTS

3.23 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.

3.24 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) has now shifted to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out[6]. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by food stores in the future.

3.25 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have significantly reduced their store portfolio in centres across the UK (e.g. HMV, GAME etc.). Although the number of retailer 'casualties' has slowed over the last 12-18 months, there are still a number of traditional high street retailers that have recently been forced into administration, most notably BHS.

3.26 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.27 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range

[6] For example, in 2015 Tesco disposed of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

and to provide an exciting shopper environment backed by the latest (digital) technology. As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets (including in Harlow, Great Yarmouth and Rugby) and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave of closures for 2018/19. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.

3.28 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

VACANCY LEVELS

3.29 The impact of retail closures in town centres due to administration (beginning with Woolworths in 2008, BHS in 2016, and Jaeger in 2017) and portfolio rationalisation (such as Clinton Cards planned closure of 120 stores in 2017/18, as well closure of all Banana Republic stores in 2017) as well as high profile closures in 2018 such as Maplin and Claire's has led to a dramatic increase in national vacancy rates.

3.30 Experian's figures show that the national average vacancy level (expressed as a proportion of total outlets) more than doubled between 2006 and 2013; from circa 7% to 16%. Although vacancy levels have more recently have fallen back to circa 11.2% in 2017, the national average figure 'masks' the reality for different centres and locations, for example:

- Research by the Local Data Company shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more 'healthy' centres, closer to London and the south-east have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull is resulting in vacancy levels of over 20%.
- Since 2012[7] a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's and early 1990's and more recently agreed sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation as they adjust their store requirements for the new multi-channel environment.
- Third, in many centres, there can be as many as 25–30% of the occupied shops on temporary short-term lets, with little or no rent being paid[8].

3.31 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth[9]. In those cases where vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth centres, etc. Another option is 'meanwhile uses/leases', which can facilitate temporary occupation of empty buildings while a

[7] Jones Lang LaSalle, Property Predictions, 2012.
[8] Sourced from Beyond Retail (2013)
[9] London Assembly Economy Committee: Open for Business. Empty shops on London's high streets GLA, March 2013.

permanent solution is being found. Furthermore, local planning authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, area action plans and other planning tools.

TRENDS IN RETAIL-LED INVESTMENT AND DEVELOPMENT

3.32 The weak UK retail economy, the low growth in retail sales volumes, high vacancy levels and the lack of traditional development funds are all combining with other factors to create a very difficult climate for new shopping centre development and investment. One of the key impacts at the height of the economic recession was to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the downturn in 2007/08.

3.33 The Shopping Centre Development Pipeline Report (2012) published by the British Council of Shopping Centres (BCSC) showed that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets (principally in prime and secondary locations) that offer the potential for growth. In terms of new development, three significant schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds); the Old Market scheme in Hereford opened in 2014; and in 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport. Other shopping centre schemes have opened in centres across the UK since 2015, but none are of the scale witnessed during the 'golden age' of shopping centre development between 1997/98 and 2007/08.

3.34 Recent trends suggest that average scheme size is generally smaller than previous schemes (i.e. less than 27,870 sqm), apart from in the larger 'top ranking' cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer.

3.35 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the Council's main centres and the delivery of a realistic retail vision.

3.36 Given that it takes on average over ten years for a town centre scheme to be planned and developed, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Town centre redevelopment is complex and complicated by fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's modern retailer requirements. As a result, LPAs will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the BCSC research '*Enabling Retail Development*' (2015), which identified the following interventions by local authorities based on their case study research:

- **Investor**: Newport, Sheffield, Oldham, Walsall
- **Developer**: Sheffield, Oldham, Bradford, Walsall
- **Masterplanner/site assembly**: Ealing, Hounslow, Newport
- **Owner and management company**: Woking
- **Public Realm delivery**: Hemel Hempstead, Bradford
- **High Street improvements and grants**: Newport, Hounslow, Bradford

3.37 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 25-50' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres. So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

3.38 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings, while mindful of avoiding harm to such heritage assets) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators[10] argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

INDEPENDENTS AND MARKETS

3.39 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure prime locations in town centres. However this does not underestimate or undervalue the important role of small independent shops[11] and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called 'clone towns'[12] due to the increasing colonisation of centres by larger chain stores. The homogenisation of the high street is discussed below:

> *"Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home." (New Economics Foundation, Reimagining the High Street, 2010)*

[10] English Heritage (2013), The Changing Face of the High Street: Decline and Revival
[11] There is no national definition however the Town Centres SPG defines 'small independent shops' as a shop with a gross floorspace of 80 sqm or less.
[12] New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)

3.40 Notwithstanding this, research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).

3.41 In terms of street markets, the *Rhodes Survey (2005)*[13] demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the high street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to '*retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'*.

3.42 The *Portas Review*[14] also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first '*Love Your Local Market Fortnight'* (LYLM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies.

3.43 Retail markets therefore continue to make a meaningful and important contribution to towns and cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade; as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the town's residents creating a vibrant and successful market. This will in turn attract visitors from outside the area and increase the value of the market[15].

3.44 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls is a difficult balancing act for local planning authorities. It will be a greater challenge going forward with the threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre's offer is not undermined by the new retail brands.

IMPACT OF OUT-OF-CENTRE RETAILING

3.45 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out-of-centre locations has not diminished.

3.46 Research[16] shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.

3.47 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.

[13] A Policy & Research Review of UK Retail and Wholesale Markets in the 21st Century - The Retail Markets Alliance (2009)

[14] The Portas Review: An independent review into the future of our high streets (2011)

[15] Recent research documents supporting the benefits of markets can be found via the following link: http://www.nabma.com/publications/research-documents/.

[16] Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival

3.48 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods[17] retailing to the provision of larger stores selling fashion and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).

3.49 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.

DOVER DISTRICT IN CONTEXT

3.50 The above national analysis of trends is also relevant in consideration of the planning, funding and delivery of new retail and leisure led development / regeneration in the District.

3.51 Within the context of East Kent, the District is seen as a specialist cluster for high economic activity in the pharmaceuticals, life sciences, transport, logistics, tourism and heritage sector(s). Dover in particular is a key transport asset with the Port of Dover handling 17% of total UK trade and is Europe's busiest passenger port. The East Kent Growth Framework (2017) seeks to sustain future economic growth in the sub-region by enhancing the individual identities and distinctiveness of towns that will increase the profile of East Kent to investors, visitors and residents. To facilitate this, and in terms of place making and shaping in the District, the key schemes identified are Dover town centre and Waterfront, Whitfield and Discovery Park as foci for development. Whitfield is a major urban extension at Dover, capable of providing up to 5,750 new homes. In relation to the Waterfront, the spatial priority consists of a number of elements including the expansion of Dover Port (including the development of Terminal 2 and associated infrastructure improvements) and mixed use developments at Dover Waterfront, Dover Mid-Town and St James.

3.52 The comprehensive regeneration of the St. James area (also known as part of the wider area referred to as the DTIZ), is in the process of completion (APP ref: 13/00107). This represents a key retail and leisure led scheme for Dover town centre and the wider District. The £53m investment by institutional investor, Legal and General Property, comprising 7,473 sqm gross will be anchored by Marks & Spencer, Next, Cineworld and Travelodge. Coupled with the Council's wider commitment to regenerate the town, this scheme is set to be a catalyst in raising the retail and leisure profile and provision of Dover town centre which in the current investment climate represents a major achievement.

[17] 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.

Figure 3.1: The St. James Scheme (February 2018)

Source: https://www.stjamesdover.co.uk/the-scheme

3.53 In East Kent, and over the period 2016-17 there has been a range acquisitions that are relevant in the context of the investment at St. James, and for the District as a whole in terms of competition, for example:

- Canterbury City Council purchased a 50% stake in the Whitefriars Shopping Centre with plans for improvement.
- Ashford will also see additional retail space following the granting of consent for the Commercial Quarter regeneration.
- Whilst the supermarket sector remains cautious, discount retailers continue to seek sites such as Aldi at Estuary View in Whitstable (1,672 sqm) and Ashford (1,719 sqm). Waitrose opened a 2,694 sqm store at Eclipse Park, Maidstone. Estuary View, Whitstable will also be home to Marks & Spencer's, Aldi and Home Bargains.
- Ashford Designer Outlet is set to double its floorspace with a 10,000 sqm extension. The £90m expansion is planned to have over 130 stores, restaurants and cafes.

3.54 The above sample of key investments and transactions sets the scene in terms of the competition around the District. It is therefore important that the Council is proactive in retaining and attracting expenditure from the District and beyond through a range of channels such as tourism and the passing trade via Dover Port. Over the longer term capitalising on the spatial priority options including the expansion of Dover Port (including the development of Terminal 2 and associated infrastructure improvements) and mixed use developments at Dover Waterfront will aid in this objective.

SUMMARY

3.55 This section has illustrated that existing floorspace in town centres faces a myriad of challenges. These will continue to grow over the short, medium and long term. This notwithstanding, for the centres within the Council area to perform strongly they will need to embrace the new dynamics and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical 'store based' retailing in town centres.

3.56 There are positive signs that the UK is emerging from the shadow of the longest and deepest economic downturn in living memory, but it is clear that our town centres and high streets post-recession are under pressures to simply retain retail businesses, let alone attract new investment and development.

- First, although the economy in general, and retail sector in particular, is forecast to experience growth over the short to medium term at least, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit and other global uncertainties arising from international politics.
- Second, the growth of online shopping is impacting on the vitality and viability of many of Britain's centres and high streets.
- Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres – and particularly historic centres - to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky goods' conditions on existing retail parks.

3.57 Within the Council's area, there will be a need to build in resilience to the changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres.

3.58 These trends, and others, are also placing pressures on rental growth and market demand in many centres, particularly the smaller secondary centres and market towns outside the 'top 25-50' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores[18].

3.59 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:

- At one end of the spectrum the larger, more dominant 'top 25-50' **cities and towns** should strengthen their competitive position. Because of their scale and catchment populations they will continue to attract market interest from high profile domestic and international retailers seeking space, as well as from commercial leisure operators.
- At the other end of the spectrum the smaller **local and neighbourhood centres** will be less affected. They are principally meeting the everyday retail (food), service and community needs of their local ('walk-in') resident catchment populations. It will therefore be important for local planning authorities to protect the important offer, role and function of these smaller centres.
- It is the **medium-sized towns** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements. The challenge for local planning authorities will therefore be how to revitalise and regenerate these centres, looking beyond retail as a key driver for growth.

3.60 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities). This is

[18] Javelin Group (October 2011), 'How Many Stores Will We Really Need?'

because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.

3.61 Therefore those shopping locations that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations, with good accessibility, etc.) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than compete with the centre’s existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre’s overall vitality and viability.

3.62 In this context, it is clear that the ‘top 25-50’ prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing LPAs will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

3.63 This provides the important background and context for assessing and understanding the potential for new retail investment and development in the three local authority areas and centres over the short, medium and long term.

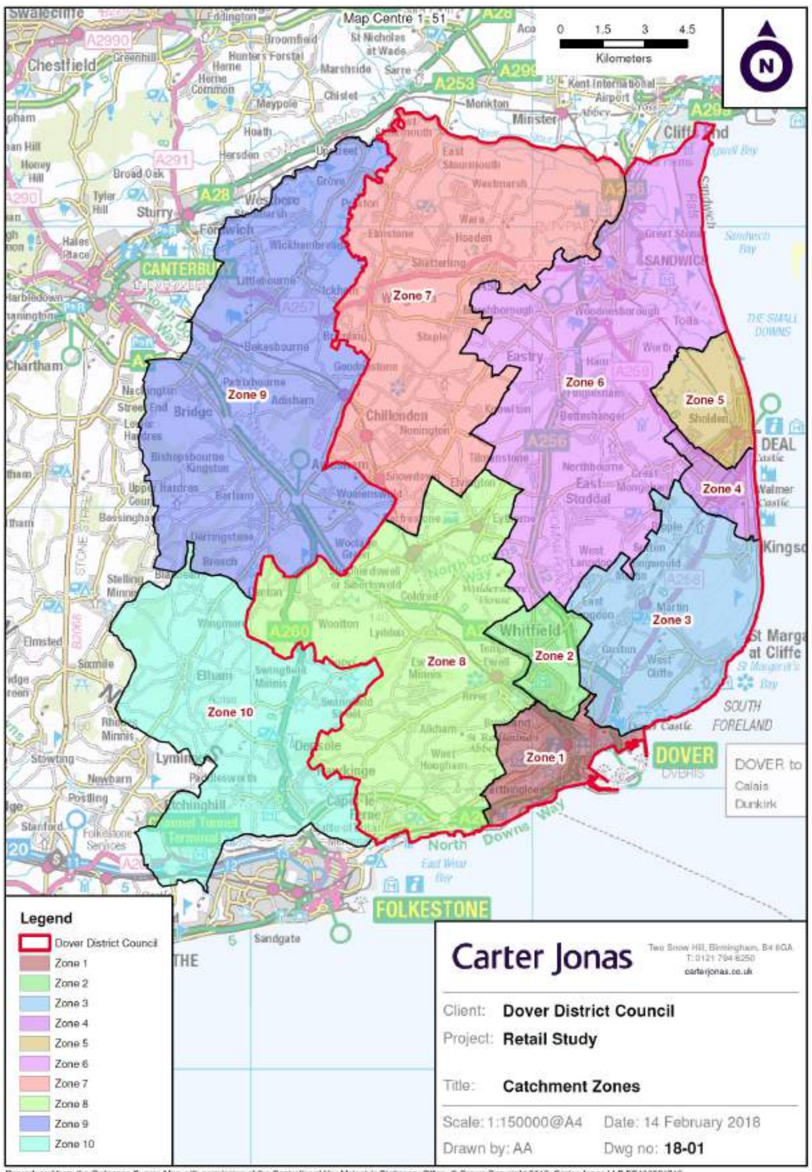
4. STUDY AREA & SHOPPING PATTERNS

4.1 This section first defines the catchment/study area that provides the basis for the quantitative needs assessment. It then describes the household telephone interview survey (HTIS) approach and summarises the key headline findings of the market share analysis for convenience and comparison goods retailing.

STUDY AREA AND ZONES

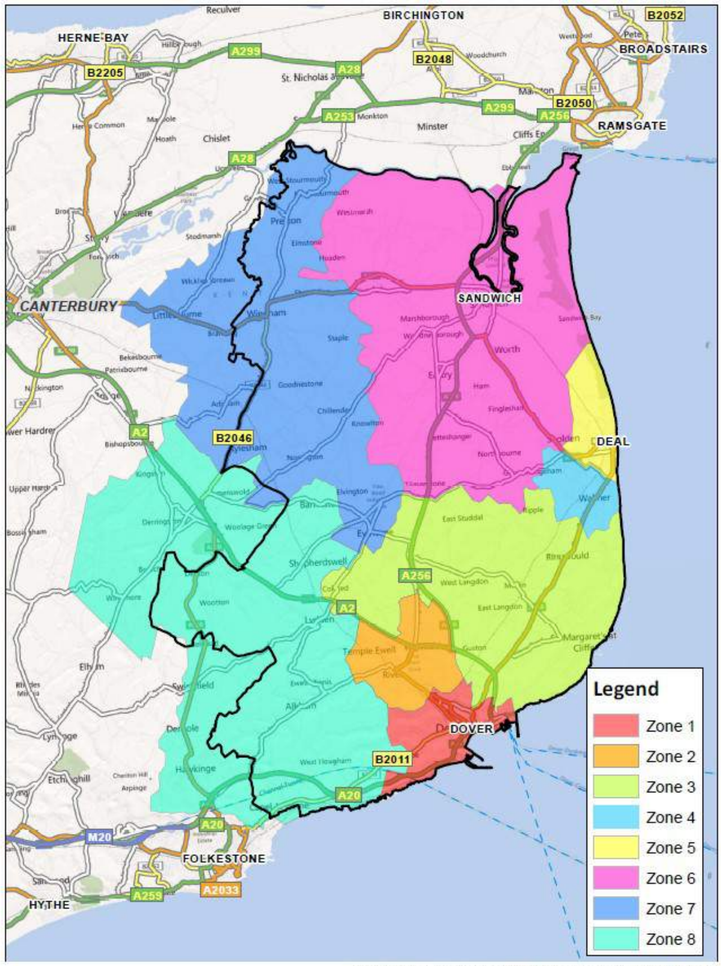
4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using ward geography which covers the Council area in full, as well as outlying areas (see **Figure 4.1** and also shown in **Appendix 1**).

Figure 4.1: Study Area



4.3 The starting point for the study was the study area used in the Council's previous retail study (in 2012). The study area for this study is broadly the same as that defined in the previous study (shown below). The key difference being that the previous study area was based on postcode geography whilst the new study area is based on ward geography.

Figure 4.2: Study Area- 2012 RSU



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4.4 Therefore the extent of the individual zones cannot inevitably be identical. The comprising wards and number of interviews is detailed in **Table 4.1** below:

Table 4.1: Study Area: Zones

Zone	Comprising Wards	No. of Interviews
1	Town and Pier Ward Maxton, Elms Vale and Priory Ward St. Radigunds Ward Castle Ward Tower Hamlets Ward	**100**
2	Whitfield Ward Buckland Ward	**100**
3	St. Margaret's-at-Cliffe Ward Ringwould Ward	**100**
4	Walmer Ward Mill Hill Ward	**100**
5	North Deal Ward Middle Deal and Sholden Ward	**100**
6	Eastry Ward Sandwich Ward	**100**
7	Little Stour and Ashstone Ward Aylesham Ward	**100**
8	Eythorne and Shepherdswell Ward Capel-le-Ferne Ward River Ward Lydden and Temple Ewell Ward	**100**
9	Nailbourne Ward Little Stour & Adisham Ward	**100**
10	North Downs East Ward	**100**
	Total	**1000**

4.5 These zones provide the sampling framework for the HTIS. This zone-by-zone approach also enables more detailed analysis of shopping patterns and expenditure flows both within and outside the study area for the purpose of the retail capacity assessment, in accordance with good practice. These combined zones are used to provide more detailed analysis of market shares achieved by stores in the Council area and to take account of catchments for competing centres outside.

4.6 **Table 4.2** shows the study zone population projections based on the latest Experian projections[19].

Table 4.2: Study Area: Experian Based Population Projections

ZONE:	2017	2022	2027	2032	2037	%	2017-37
Zone 1	24,397	25,124	25,819	26,648	27,506	12.7%	3,109
Zone 2	13,169	13,608	13,987	14,377	14,772	12.2%	1,603
Zone 3	7,183	7,372	7,563	7,692	7,774	8.2%	591
Zone 4	15,903	16,196	16,563	16,926	17,275	8.6%	1,372
Zone 5	16,058	16,467	16,926	17,275	17,609	9.7%	1,551
Zone 6	12,539	12,806	13,090	13,431	13,704	9.3%	1,165
Zone 7	12,376	12,806	13,300	13,713	14,129	14.2%	1,753
Zone 8	14,006	14,487	14,926	15,282	15,634	11.6%	1,628
Zone 9	8,456	8,693	9,082	9,500	9,845	16.4%	1,389
Zone 10	12,047	12,515	13,088	13,653	14,199	17.9%	2,152
Study Area	**136,134**	**140,074**	**144,344**	**148,497**	**152,447**	**12.0%**	**16,313**
Dover DC Area (Zones 1-8)	**115,631**	**118,866**	**122,174**	**125,344**	**128,403**	**11.0%**	**12,772**

Source: Experian

Household Telephone Interview Survey

4.7 NEMS Market Research was commissioned to carry out a HTIS across the defined study area and zones in June 2017 (**Appendix 4**). The questionnaire was designed by CJ in collaboration with the Council. In total, some 1,000 interviews were conducted across ten zones (**Figure 4.1**). This involved structured interviews by telephone with the person responsible for the main household shop. A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the person responsible for shopping in the

[19] Note: Experian projections yield an annualised growth rate of 0.52%pa (2016-2036) compared with 0.51%pa (2016-2035) based on the Council's SHMA. On this basis the Experian projections were agreed with the Council and utilised for this study.

household. Responses across the study area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated areas were not under or over represented in terms of the market share assessment. In addition, these results were further filtered to remove 'null' responses (and don't know) responses. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

4.8 The survey results help to identify broad patterns and preferences for different types of convenience and comparison goods shopping purchases, as well as leisure use across the study area. The key findings are used to inform the baseline market share analysis and turnover estimates that underpin the quantitative retail capacity assessment.

Convenience Goods – Market Share Analysis

4.9 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

4.10 The survey-derived market share (%) analysis for all convenience goods shopping is set out in Table 1 of **Appendix 5.** It should be noted that for this stage of the analysis the market shares for both convenience and comparison goods retailing include expenditure on SFT (which comprises internet sales, mail order shopping, etc.), but exclude 'null' responses (such as 'don't knows', etc.) in accordance with good retail planning practice.

4.11 The overall market shares in Table 1 have been derived from the analysis of the responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. The market shares for these different types of food shopping are set out in detail in Tables 2 and 4 of **Appendix 5.**

4.12 In order to avoid the market share analysis of food shopping patterns being 'skewed' by larger superstores and foodstores in the study area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified. The market shares for this 'other' shopping are set out in Table 3 ('other' main food shopping) and Table 5 ('other' top up food purchases') of **Appendix 5.**

4.13 The responses for 'primary' and 'secondary' food shopping purchase have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. Assumptions are informed by Question 6 of the household survey which identifies the proportion of expenditure spent on main food shopping. In this case we have applied an assumed weighting of 60% for main 'bulk' shopping; 15% for secondary main 'bulk' shopping; 15% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping.

4.14 The key findings of the market share analysis are briefly described below.

4.15 In terms of the market share of SFT and principally internet shopping, Table 1 (**Appendix 5**) shows that the share of all food shopping across the study area (i.e. Zones 1-10) is 5.6%. SFT's share varies across the study area from a low of 3.1% in Zone(s) 3 and 8, to 10.8% in Zone 4. Experian's latest Retail Planning Briefing Note 15 (RPBN15) (December 2017) shows that the 2017 unadjusted national average market share for non-store (SFT) convenience goods retail sales is 10.8%. This is higher than the market share of 5.6% for the wider study area. A number of factors may influence this lower than average market share; such as, for example, good access to foodstores at the local level and the extent/quality of the existing internet infrastructure (such as, for example, the logistics for delivery). This highlights the potential for SFT market penetration to increase in the future as online grocery shopping becomes more popular and convenient. If this was to occur, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2037.

4.16 By way of comparison, the 2012 RSU market share for convenience goods SFT stood at 3.7%, compared with 5.6% currently.

4.17 Turning to the market share analysis for the main centres and stores in the Council Area, Table 1 (**Appendix 5**) shows that they are achieving an overall market share ('retention level') of 69.5% from within the study area (Zones 1-10). This represents a relatively strong retention rate and reflects the good food shopping offer in the local authority area.

4.18 Focusing on individual zones in the Council area, the assessment shows that retention varies and is highest in Zones 3 and 5 (90.4% and 90.6% respectively). This reflects the good availability and choice of major foodstores and convenience floorspace across the Council area. The foodstores in the Council area are achieving lower market shares in the outer zones (e.g. 5.4% in Zone 10 and 7.2% in Zone 9), which reflects the attraction of other stores and centres that are more convenient to the population living in these zones; such as in Folkestone and Canterbury.

4.19 **Table 4.3** shows the distribution of market shares within the Council area:

Table 4.3: Convenience goods market shares for key centres in the Council Area

Location	Study Area (Zones 1 – 10)
Dover Town Centre	1.9%
Deal Town Centre	16.0%
Sandwich Town Centre	3.1%
All Other Local & Village Centres	2.7%
All Out-of-Centre	45.8%
Total	**69.5%**

Source: Table 1, **Appendix 5**

4.20 As the table shows, whilst Dover (town and edge-of-centre) stores achieve a market share of 1.9% (principally Marks & Spencer (1%) and Iceland (0.3%)), Deal Town centre (including Marks & Spencer's (1.3%), Sainsbury's Superstore (10.6%) and Iceland (1.2%)) achieves a higher market share of 16%. In contrast Sandwich (town and edge-of-centre) (including Co-op (2.3%)) has a much lower market share of 3.1%.

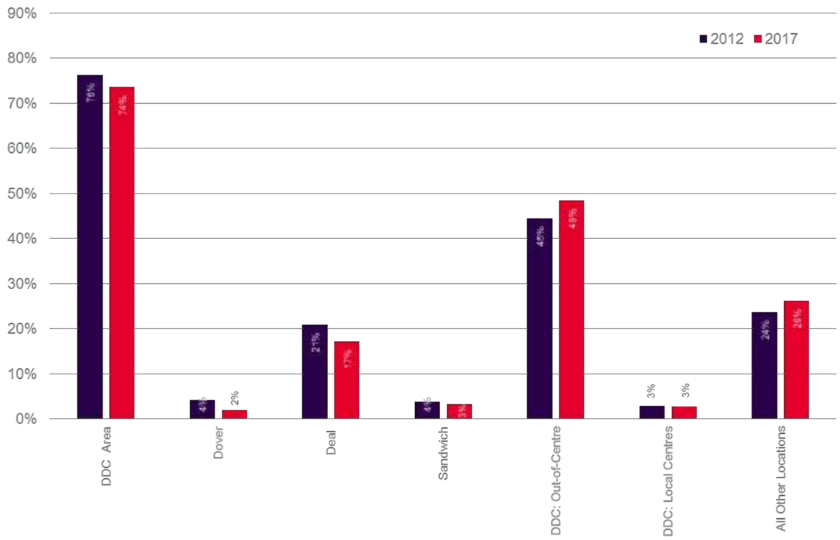
4.21 The other smaller local and village centres are collectively attracting 2.7% of expenditure from across the entire study area. There is a strong provision of smaller convenience stores across the Council area, typically serving the day-to-day more frequent top-up food shopping needs of their local resident catchment populations.

4.22 The Council area is also served by a large provision of out-of-centre floorspace that achieves a market share of 45.8 from the study area (Zones 1-10). Of this, Tesco Extra (White Cliffs Business Park, Whitfield) attracts the highest market share (17.1%) followed by Aldi, Cherry Tree Avenue, Dover (11.3%) and Morrisons, Bridge Street, Dover (10%).

4.23 Finally, the 2017 survey results indicate that the 'leakage' to other competing stores stood at 24.9%. The main competing centres for food shopping from across the study area (Zones 1-10) are Canterbury (11.1%) and Folkestone (7.3%). Leakage is largely confined to peripheral zones where foodstore catchments overlap with the Council Area (e.g. Zone 7, 50.1%; Zone 9, 84.2% and Zone 10, 88.2%).

4.24 By way of comparison with the 2012 RSU[20], this showed that the main centres and stores in the District were achieving a higher total market share (excluding SFT) of 76.3% compared with 73.6% in 2017. The rate of retention therefore shows a marginal decrease (**Figure 4.3**).

Figure 4.3: Convenience Goods Market Shares (excl. SFT) – 2012 and 2017 Studies Compared



Comparison Goods – Market Share Analysis

4.25 Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods. The household survey comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest RPBN15, including: 'clothing and footwear'; recording media; electrical goods; books; furniture and carpets; DIY and garden products; medical goods; etc.

4.26 Table 1 (**Appendix 6**) shows the market shares (%) for all comparison goods shopping purchases made both within and outside the study area. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-10. The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

4.27 As for the analysis of convenience goods, the market shares include expenditure on Special Forms of Trading (SFT) but exclude all 'null' responses. The key findings of the market share analysis are briefly described below.

4.28 Table 1 (**Appendix 6**) shows that SFT's share of all non-food shopping across the total study area (i.e. Zones 1-10) is 24.5%. This is high and reflects the growing attraction and share of this channel of retailing. The SFT market shares vary from 27.5% in Zone 1 to 27.4% in Zone(s) 5 and 10. In comparison, Experian's latest RPBN15 shows that the 2017 unadjusted national average market share for non-store (SFT) comparison goods retail sales is 19.7% in 2017. The SFT for the study area overall is therefore higher than the Experian average. If the SFT market share for the study increases at this rate over time, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2037.

[20] The 2012 Dover District Council: Retail Study Update (2012 RSU) study area was based on postcodes and therefore not directly comparable with the current assessment. Notwithstanding this, a broad market share comparison is provided that draws on the outputs of the 2012 study. Note that the 2012 market shares exclude SFT (Appendix 4) and to undertake a like for like comparison the equivalent data (market share excluding SFT) from the current assessment has been used.

4.29 By way of comparison, the market share for SFT in the 2012 RSU was 7.1% whilst this has increased markedly in the current assessment to 24.5%. This is an indication of the shifting pattern of consumer behaviour and associated spending with resultant implications for future floorspace capacity.

4.30 Turning to the market shares for the main centres and shopping facilities in the Council area, Table 1 (**Appendix 6**) shows that the Council's centres and comparison goods shops are achieving an overall 'retention level' (i.e. expenditure retained from within the study area) of 29.0% within the total study area (Zones 1-10). This retention level increases to 34.8% within the Council area (Zones 1-8). The highest level of retention is in Zone 5 (45.4%).

4.31 Looking at expenditure retention for the main centres, the following key market shares have been identified:

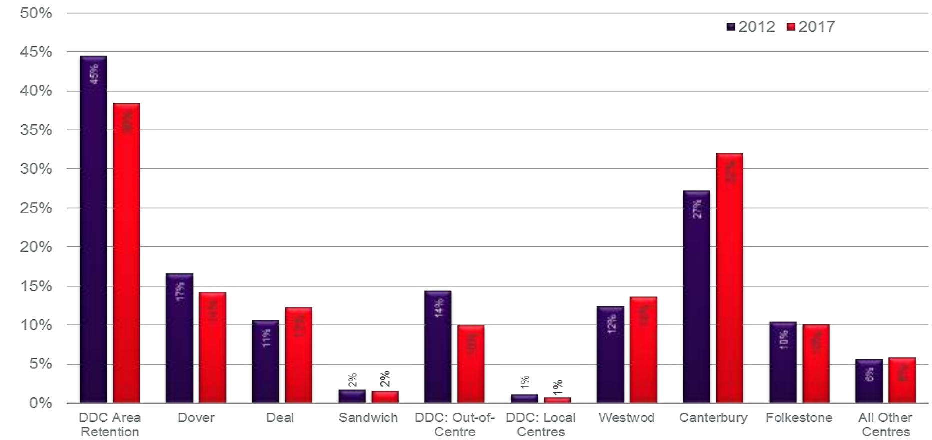
- **Dover Town Centre** accounts for 10.7% of study area expenditure (Zones 1-10) and 12.9% of Council area (Zones 1-8) expenditure. Within Zone 1 retention increases to 31.4%.
- **Deal Town Centre** accounts for 9.2% of study area (Zones 1-10) expenditure and 11.1% of Council area (Zones 1-8) expenditure. Within Zone 5 retention increases to 37.7%.
- **Sandwich Town Centre** has a market share of 1.1% across the study area (Zones 1-10) and 1.3% in the broadly defined Council area (Zones 1-8). Within Zone 6 retention increases to 6.5%.
- All Other **Local & Village Centres** account for 0.5% of study area (Zones 1-10) expenditure and 0.6% of Council area (Zones 1-8) expenditure. This is expected given the limited comparison goods offer available in these centres.
- All **Out-of-Centre** floorspace accounts for 7.5% of study area (Zones 1-10) expenditure and 8.9% of Council area (Zones 1-8) expenditure. The highest market share is achieved by the White Cliffs Business Park (including Tesco Extra, Travis Perkins and Buildbase) from Zone 8 at 8.5%.

4.32 Based on an analysis of the entire study area (Zones 1-10), the main competing comparison goods centres are Canterbury (24.1%) and Westwood (10.3%).

4.33 By way of comparison with the 2012 RSU[21], this showed that the main centres and stores were achieving an overall market share of 44.5% (excluding SFT) which is higher than the current retention of 38.4% (**Figure 4.4**). In terms of competing centres, Westwood's comparison goods market share has increased from 12% (2012) to 14% (2017) whilst Canterbury's has increased from 27% (2012) to 32% (2017).

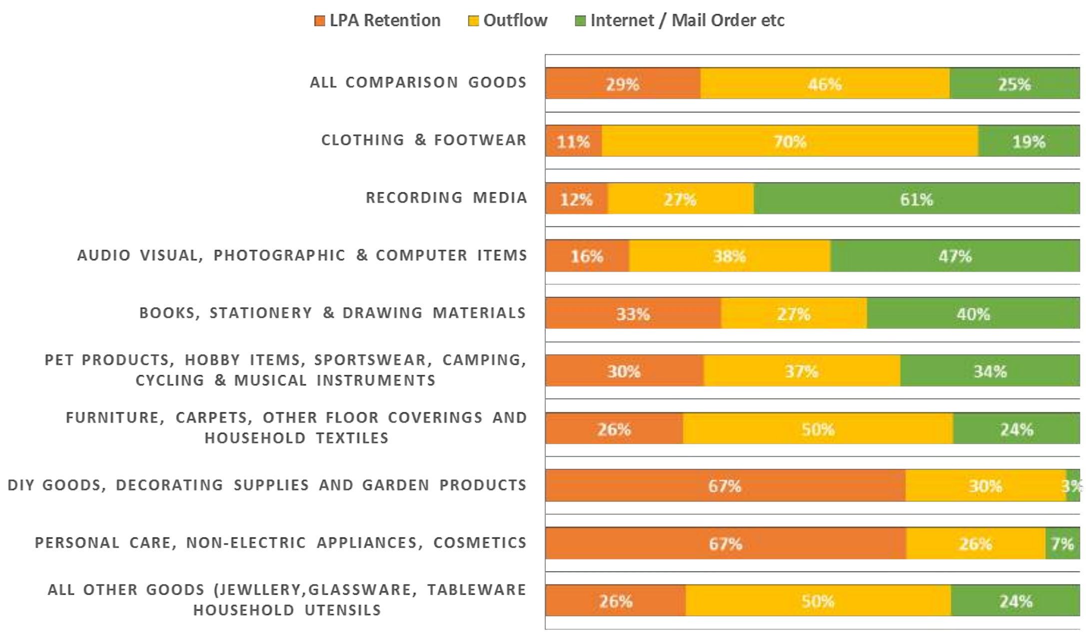
[21] The 2012 Dover District Council: Retail Study Update (2012 RSU) study area was based on postcodes and therefore not directly comparable with the current assessment. Notwithstanding this, a broad market share comparison is provided that draws on the outputs of the 2012 study. Note that the 2012 market shares exclude SFT (Appendix 5) and to undertake a like for like comparison the equivalent data (market share excluding SFT) from the current assessment has been used.

Figure 4.4: Comparison Goods Market Shares (excl. SFT) – 2012 and 2017 Studies Compared



4.34 **Figure 4.5** illustrates the market shares for the Council's main centres and stores (aggregated), other centres and SFT/internet shopping for residents in the study area (Zones 1-10) for different categories of comparison goods expenditure (Tables 1-10, **Appendix 6**).

Figure 4.5: Comparison Goods market shares for the study area (Zones 1-10)



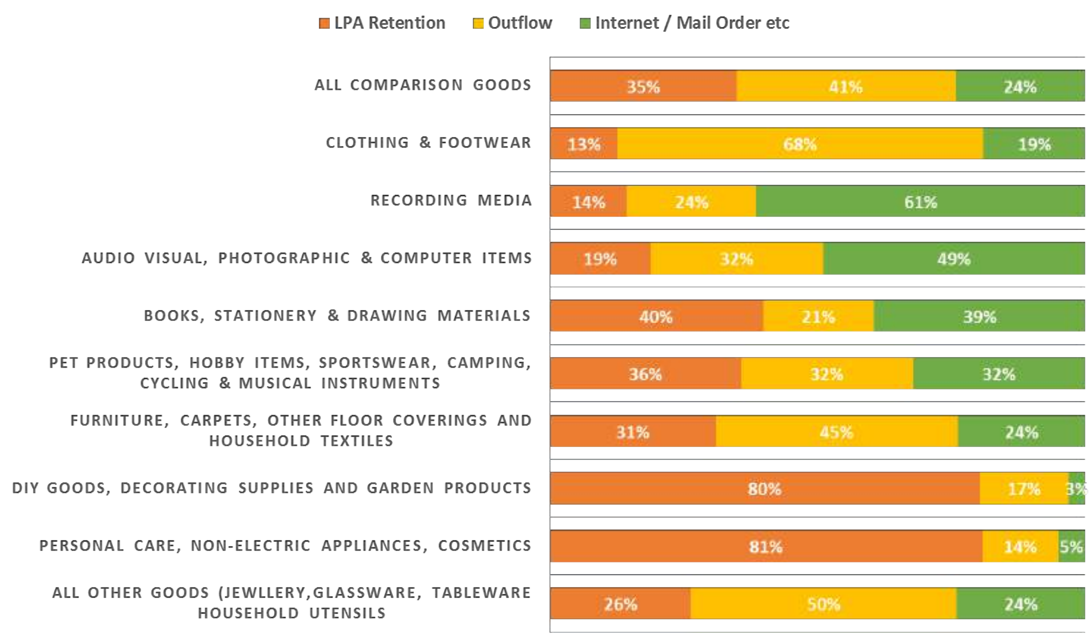
4.35 The figures show the relatively strong competition from other centres and shopping facilities located both within and outside the defined study area (Zones 1-10) for different types of comparison goods expenditure. For example, based on the study area, expenditure retention is strongest for the Council locations for DIY goods (67%) and personal care (67%). These are strong market shares.

4.36 In contrast the largest outflow is in the clothing and footwear category (70%) with a retention level of only 11% from the study area (Zones 1-10).

4.37 The highest outflow on SFT expenditure is in the recording media category at 61% from the study area (Zones 1-10). SFT's market share is more limited for DIY (3%) and personal care products (7%). However, this does not necessarily mean that these specific sectors will be 'immune' from the growth in internet shopping over the medium to long term.

4.38 Focussing on the Council area only (Zones 1-8), **Figure 4.6** shows the broad market share patterns. The key difference compared with the wider study area is in the DIY and Personal Care goods categories where the Council area retention increases to 80% or over.

Figure 4.6: Comparison Goods market shares for the study area (Zones 1-8)



SUMMARY

4.39 The analysis has shown that convenience and food stores serving the Council area are achieving an overall market share of 69.5% (with SFT), which represents a good retention rate reflecting the strength and quality of the overall food shopping offer. In contrast, the comparison goods market share (with SFT) for the main centres and stores in the District is lower achieving an overall 29.0%.

4.40 Across the Council area SFT's market share for convenience goods is lower than the national average, which suggests that there is potential for internet food shopping to increase its market share over time. This may reduce the expenditure available to support the need for physical space over the longer term. The comparison goods market share for SFT has increased markedly from 7.1% in the 2012 RSU to 23.6%. The latter is an indication of the trend in the shifting pattern of consumer behaviour and associated spending. This needs to be monitored regularly through household surveys.

4.41 Comparing the market shares (excluding SFT) from the 2012 RSU[22] against the current assessment shows:

- Convenience goods retention in the District has decreased marginally from 76.3% in 2012 to 73.6% in 2017;

[22] The 2012 Dover District Council: Retail Study Update (2012 RSU) study area was based on postcodes and therefore not directly comparable with the current assessment. Notwithstanding this, a broad market share comparison is provided that draws on the outputs of the 2012 study. Note that the 2012 market shares exclude SFT (Appendix 4 & 5) and to undertake a like for like comparison the equivalent data (market share excluding SFT) from the current assessment has been used.

- Dover Town Centre’s convenience goods market share has decreased from 4% in 2012 to 2% in 2017;
- Deal Town Centre’s convenience goods market share has decreased from 21% in 2012 to 17% in 2017;
- Sandwich Town Centre’s convenience goods market share has decreased marginally from 4% in 2012 to 3% in 2017;
- Convenience goods retention across the main centres of Dover, Deal & Sandwich has decreased from 29% in 2012 to 22% in 2017;
- Convenience goods out-of-centre floorspace has increased retention from 44% in 2012 to 49% in 2017;
- Convenience goods floorspace in all other locations outside of the District has increased from 24% in 2012 to 26% in 2017.
- Comparison goods retention in the District has decreased from 45% in 2012 to 38% in 2017;
- Dover Town Centre’s comparison goods market share has decreased from 17% in 2012 to 14% in 2017;
- Deal Town centre’s comparison goods market share has increased marginally from 11% in 2012 to 12% in 2017;
- Sandwich Town Centre’s comparison goods market share has stayed the same at 2% between 2012 and 2017;
- Comparison goods retention in the main centres of Dover, Deal & Sandwich has therefore decreased from 30% in 2012 to 28% in 2017;
- Comparison goods out-of-centre floorspace has decreased retention from 14% in 2012 to 10% in 2017;
- In terms of competing centres, Westwood’s comparison goods market share has increased from 12% (2012) to 14% (2017) whilst Canterbury’s has increased from 27% (2012) to 32% (2017). Folkestone’s market share remains the same over the period at 10%.

4.42 The market share (excluding SFT) analysis shows that for convenience goods whilst the market shares within the town centres has decreased, out-of-centre locations have increased their retention. In contrast, and for comparison goods, Deal has marginally increased its retention with the competing locations of Westwood and Canterbury in particular increasing their market share.

4.43 Whilst the above provides a broad indication of the market share performance of centres in the District, a key trend that the Council needs to proactively monitor by way of updated surveys is the ongoing impact of the internet on food and non-food shopping.

4.44 The key focus for the Council is to increase retention and clawback expenditure to its centres. It is anticipated that within Dover Town Centre the St. James scheme will aid in this process. Over the longer term it is anticipated that a good range of complementary leisure uses, particularly cafés and restaurants, cinema and hotel will create a pleasant shopping environment all of which will contribute to the overall appeal and thereby increase the broader retention from across the District and potentially beyond.

5. TOWN CENTRE HEALTH CHECKS: METHODOLOGY

5.1 **Sections 6-9** provide detailed health check assessment for the Council's main centres of Dover, Deal and Sandwich. Additionally a high level overview has been undertaken of the smaller neighbourhood and village centres comprising the following:

- Rural Service Centre - Aylesham.
- Local Centre – Ash, Capel-le-Ferne, Eastry, Shepherdswell, Wingham
- Village Centre - Alkham, East; Langdon, East; Studdal, Elvington, Eythorne, Goodnestone, Kingsdown, Great Mongeham, Lydden, Nonington, Preston, Ringwould, Ripple, St. Margaret's, Staple, West Hougham, Woodnesborough, Worth.

5.2 In summary, health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level. In accordance with the PPG (paragraph 005 Reference ID: 2b-005-20140306), there are a number of indicators that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the indicators include:

- the diversity of uses (e.g. retail and services offer);
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' views and behaviour
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- state of town centre environmental quality.

5.3 In this case the most reliable KPIs have been gathered (where possible) for the centres to help inform the assessment of their overall strengths and weaknesses in in terms of their retail and leisure provision, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability. We have referred to a number of datasets and research to help assess the relative vitality and viability of the Council's main town centres, as referenced throughout the report. The general methodology is set out below.

Engagement of Key Stakeholders

5.4 As part of undertaking the town centre health checks, we also contacted a number of key stakeholders by way of telephone calls. The key stakeholders contacted are listed below.

Centre	Stakeholder
Dover	Dover Waterfront Dover Contact Coastal Communities Project LDA Design
Deal	Deal Town Council
Sandwich	Discovery Park EZ

Retail Composition & Diversity of Uses

5.5 The health check assessments have been informed by analysis of the latest published Experian Goad reports[23] for each town centre, where available. These set out the composition (number and proportion) of units and floorspace in each use classification across the centres compared with the national averages for all circa 1,950 centres and shopping locations audited by Experian Goad. Where Goad reports are not available, we have necessarily drawn on our own observations of the respective centres. It should be noted that 'services' (as defined by Experian Goad) are sub-divided into the following three sub-categories.

- **Retail services** – Class A1 and certain sui generis uses including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.;
- **Leisure services** - which comprise cafes and restaurants (Class A3), betting shops (sui generis), fast food/ takeaway outlets (Class A5); and
- **Financial and professional services** - covering all Class A2 uses (such as banks, estate agents, etc).

Town Centre Boundaries

5.6 Our description of each centre's town centre is based on the boundaries defined by the Council. However, where Experian Goad geography is relied on to assess the centre's composition, it should be noted that the area surveyed by Goad is not necessarily the same as the Council's identified town centre boundary. As such, the number of units will differ from the units that are reported annually by the Council in their Authority Monitoring Report. To note that Goad geographic area is based on a survey of the extent of the retail presence or provision that exists or extends across a centre. In this way, and to restate, this data will not necessarily align to the Council's defined town centre boundary.

Vacancies

5.7 Site visits to the centres by the Council in March 2018 have informed and updated the vacancy levels recorded by the Experian Goad Category Reports[24]. The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of retailer demand and/or the fact that vacant units are not meeting demand and are not 'fit-for-purpose'. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural "churn" in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with care.

Multiple and Independent Retailers

5.8 The Experian Goad Category Reports and the Council's audit in March 2018 also provide analysis on multiple retail representation. A multiple is defined by Experian Goad as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.

Street Markets

5.9 Whether or not a centre has a market, and the quality and offer of a market, can give an indication of the vitality of a centre. Information regarding the health of the markets discussed in this report is obtained from our own

[23] Dover – June 2016; Deal – November 2016; Sandwich October 2015
[24] Undertaken in August 2017

research and observations of the centres, as well as stakeholder consultation. In line with Paragraph 23 of the NPPF, existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive.

Retailer Demands & Requirements

5.10 Information on retailer requirements, which provides an indication on demand by retail and leisure operators for accommodation in a given town centre has been obtained from a variety of sources including the Requirements List.

Prime Zone A Rents

5.11 It should be noted that commercial property indicators normally include Prime Zone A Rents[25] and Yields assessment. Therefore, an assessment of Prime Zone A rents and yields is provided where available.

Customer Views and Behaviour

5.12 The views and behaviour of shoppers to the respective centres draws on the findings of the household survey. The household survey comprised in total 1,000 interviews across ten zones and asked specific questions regarding respondents likes and dislikes about Dover, Deal and Sandwich.

Environmental Quality

5.13 Environmental quality represents a key performance indicator (KPI) to help assess a centre’s overall vitality and viability. An assessment of environmental quality including cleanliness and attractiveness, security, treatment of buildings and open spaces, is undertaken using our own research and observations of the centres, as well as stakeholder consultation.

Accessibility

5.14 A centre’s vitality and viability can also be understood through an assessment of accessibility. This is undertaken through our own research, using observations of how easy a centre is to reach; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes. Consultation with key stakeholders can also reveal and reinforce findings.

Out-of-Centre Provision

5.15 The location, scale and mix of out-of-centre stores and shopping facilities in the local planning authority area has been determined using a number of sources, including Completely Retail and our own audits and site visits. The overall attraction and performance (market shares) of these out-of-centre stores has been further informed by the results of the household survey along with consultation with key stakeholders.

New Investment & Potential Development

5.16 Carter Jonas has relied on the Council to identify new investments and potential development opportunities for new retail, leisure and town centre uses. This has also been supplemented by consultation with key stakeholders, as well as a review of the relevant planning history of key sites.

[25] Shop Rental Values are based on a rate of square metre or square foot in terms of Zone A (ITZA). Prime Zone A rents refer to the rental values to a standard retail shop unit in a prime location. Zoning as a method has been applied in the UK to the analysis of shop rents since the 1950s. It is an established standard of valuation that the zone at the front of a shop is considered the most valuable. In valuation terms, the first zone is known as Zone A, the next Zone B, the next Zone C and anything after Zone C is usually defined as the remainder. The area commonly known as ITZA is calculated by adding the area of Zone A to the area of Zone B divided by 2 and Zone C divided by 4 etc. Hence in value terms, Zone B has half the value per square metre that Zone A commands, Zone C a quarter of the value of Zone A, and say Zone D an eight.

6. DOVER HEALTH CHECK

CONTEXT

6.1 Dover is located in the south-east corner of Britain between Deal and Folkestone. It is the District's principal town, an international gateway and transport centre, renowned for its dramatic landscape setting with the White Cliffs, military heritage and port. While Dover's location provides an exceptional and defining setting, the steep topography has resulted in a linear character to the town with development following the bottom of the valley. This has resulted in an elongated town centre.

6.2 Dover sits as the top of the settlement hierarchy with a *"Secondary Regional Centre"* status (see Core Strategy Policy CP1). Whilst the Core Strategy does not define a retail hierarchy, Dover is recognised to be one of the main shopping centres within the District and thus is understood to be a town centre. The town centre boundary extends to York Street and Priory Road to the west, Ladywell and Park Street to the north, and Maison Dieu Road to the east, and runs along Cambridge Road and the Dover Waterfront area.

6.3 The primary and secondary shopping frontages in Dover are defined in the Core Strategy (2010). Primary shopping frontages are on either side of Biggin Street and also extend along Canon Street from High Street in the north and Market Square in the south. Secondary shopping frontages extend along either side of King Street up to Townwall Street, as well as on either side of Worthington Street and partway along Pencester Road.

6.4 The Dover District Core Strategy (2010) identifies four strategic development opportunities for Dover as a whole, including: Dover Waterfront; Mid Town; the Former Connaught Barracks complex; and the managed expansion of Whitfield. Whilst not all of these development sites are located within the town centre, they are all likely to have significant impact on the town and Dover more generally. The key scheme that will help to improve the attraction and competitive position of the town centre is the development at St. James (App. Ref: 13/00107).

6.5 As previously mentioned the St. James scheme is in the process of being completed. This retail and leisure development comprising 7,473 sqm gross that will include a 6-screen Cineworld, an Marks & Spencer, Next, Cineworld, Anytime Fitness, Costa Coffee, Superdrug, Trespass, Card Factory, Iceland food warehouse, Poundland, Shoezone, Bella Italia and Nandos alongside Travelodge. The development is located on the A20, making it both accessible and visible for visitors, and local people. At the time of writing this report the scheme was scheduled for completion in 2018. It is anticipated that this development will assist in substantially raising the retail profile of Dover.

RETAIL COMPOSITION & DIVERSITY OF USES

6.6 **Table 6.1** summarises the composition of the centre's retail mix and diversity of uses conducted by the Council (in March 2018) based on the same area geography as the 2016 Goad Category Report produced by Experian but also including the outlets that were open at the time in the St. James' scheme. The output of this new survey is also compared against the 2016 Experian Goad Category Report.

Table 6.1 Current Retail and Service Offer – Units

Category	Number of Outlets		% of Total Outlets		UK (%)	
	2018	2016	2018	2016	2018	2016
Comparison	104	89	28.8%	28.2%	30.9%	31.5%
Convenience	26	25	7.2%	7.9%	8.9%	8.7%
Retail Service	42	34	11.6%	10.8%	14.5%	14.3%
Leisure Service	102	86	28.3%	27.2%	24.0%	23.7%
Financial & Business Service	32	36	8.9%	11.4%	10.3%	10.4%
Vacant Retail & Service Outlets	55	46	15.2%	14.6%	11.2%	11.1%
TOTAL:	**361**	**316**	**100.0%**	**100.1%**	**99.8%**	**99.7%**

Source: Dover District Council (2018) & Experian Goad Category Report (2016)

Convenience

6.7 There are 26 convenience units[26] in the area according to the 2018 survey – a marginal increase over the 2016 Experian Goad Category Report of 25 units. Currently this represents 7.2% of total outlets, which is below the national average of 8.9%. The Experian Goad figures therefore refer to a marginally lower provision of food and convenience retailing when compared to the national average.

6.8 Dover Town Centre has two small supermarkets namely Costcutter on Pencester Road and Londis on King Street. There are also 17 convenience stores, a baker, two butchers and two greengrocers. Convenience provision within Dover Town Centre is also supported by a number of edge and out-of-centre supermarkets including Iceland on High Street, as well as Asda and Morrison's located at Charlton Green.

6.9 Overall, it is considered that there is an under-representation of convenience goods floorspace within Dover Town Centre. This data does not take account of the new M&S Foodhall proposed as part of the new St. James development as this was not open at the time of the Council's survey. This is likely to enhance the offer in the town centre.

6.10 Whilst town centre convenience provision is supported by out-of-centre provision to meet the needs of the local population, it is recommended that any new investment by way of foodstore development is directed to the town centre to restore an appropriate retail mix and contribute to the wider footfall of the town centre and to counter provision in out-of-centre locations (e.g. Tesco Extra and Lidl (newly opened) at White Cliffs Business Park).

Comparison offer

6.11 In 2018, Dover has 104 comparison outlets (89 in 2016). This represents 28.8% of total units and is below the national average of 30.9%.

6.12 The 2018 survey identifies 38 multiple outlets within Dover Town Centre. Major retailers in the centre[27] include Marks and Spencer, Argos, Boots, WH Smith, Burton, New Look, and Carphone Warehouse. Additional multiple retailers consist of Poundland, Sports Direct, GAME and Superdrug.

6.13 In addition to the multiple offer, there is also a high number of independent retailers. These store complement the high street shops and help to diversify the comparison offer. Across the different comparison sub-categories, the centre has a high representation of charity shops, general clothing, office supplies, jeweller's, carpet and flooring as well as a number of cosmetic and sportswear stores.

[26] The 2016 Category Report includes reference to a Co-operative store on Stembrook. It is noted that this store closed in 2017.
[27] As defined by Goad as the 30 national retailers that are likely to improve the consumer appeal of a centre.

6.14 The majority of the retailers are located along the central section of Biggin Street. In addition, De Bradlei Shopping Outlet located on Cambridge Road is another area occupied by comparison retailers. The outlet includes a number of stores that have been organised into various categories, including women's and menswear, shoes, and gifts and homeware. Based on our observation (and especially in comparison to the critical mass at the competing Ashford Designer Outlet), this outlet is considered to be struggling judging by its dated appearance, lack of identity in terms of key brands, low observed visitation rates and recent closure and reopening (in October 2016).

6.15 In summary, according to the latest survey comparison provision in Dover Town Centre is below the national average. The HTIS results identified that only 4.3% of the respondents from within the study area visit Dover Town Centre because of its range of multiple and high street retailers. Furthermore, in terms of key improvements in Dover 30.5% of respondents suggested more national multiple retailers, and 8.5% suggested more/better comparison retailers. These results suggest that the centre lacks the critical mass of comparison retailers to draw visitors into the centre, and as such provision at present is considered to be poor.

6.16 As described above, the centre's current provision will be greatly enhanced by the new development at St. James, with its critical mass of retail and leisure incorporating a multiplex cinema. The key aim for the Council over the long term will be to build on this new provision and create a complementary offer within the Dover Waterfont area to enhance visitation, pedestrian linkages and footfall for the benefit of the town centre as a whole.

Service Offer

6.17 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Table 6.1** shows, there are 176 service outlets in Dover. They account for 48.8% of all units, which is equivalent to the national average of 48.8%. The following provides a brief summary of provision in the different service categories:

- There were 42 **retail services** outlets in 2018 (an increase over the 34 outlets in 2016). This represents 11.6% of total outlets in the town centre. This is below the national average of 14.5%. This category is dominated by health and beauty retailers and hairdressers.
- In terms of **financial services** outlets, there were 32 outlets in 2018 (36 outlets in 2016), which represents 8.9% of total units and is below the national average of 10.3%. Financial services comprise, amongst others, 6 retail banks, 1 building society, 5 financial services and 3 legal services. Banks in the centre include Barclays, Natwest, Lloyds, Santander, HSBC and Halifax.
- There are 102 **leisure service** outlets in 2018. The equivalent to 28.3% of total provision and is above the national average of 24%. The current leisure offer consists, amongst others, 17 fast food & takeaways, 15 public houses, 15 cafes, 17 restaurants, 5 betting offices and 2 cinemas (at Market Square and St. James'). Overall, the mix of leisure provision in the centre is good. Higher quality food and beverage operators should be encouraged to locate to the centre to establish a night-time economy, which could appeal to local residents as well as visitors to the centre.

6.18 Overall, Dover has a strong provision of service outlets with particular strengths lying within the leisure services. The substantial retail and leisure development at St. James which includes a 6-screen Cineworld, Nandos and Bella Italia alongside Travelodge will raise the commercial leisure service provision further. Increasing retail services diversity further at the Dover Waterfront area will aid to the critical mass of service provision and attract more footfall to the centre as a whole, subject to the provision of strong and attractive pedestrian routes between the town centre and Waterfront.

VACANCIES

6.19 **Table 6.1** shows that Dover's vacancy level of around 15.2%, 55 outlets (14.6%, 46 outlets in 2016) is higher than the national average of 11.2%. By way of comparison, the 2012 RSU identified 74 vacant outlets representing a vacancy rate at the time of 25.3%. Hence whilst the vacancy rate has improved it was identified by a number of key stakeholders as one of the town centre's key weaknesses.

6.20 A large number of vacant units are situated along Biggin Street, which is the main thoroughfare into the town centre. Improvements are required to make the area more vibrant and inviting to encourage take up of empty space. On this matter, we understand that the Council has commissioned consultants LDA Design to provide opportunities for a new Public Realm Strategy to help the town reconnect its communities with the waterfront through: (i) public realm improvements; (ii) a creative mix of uses; and (iii) new infrastructure investment to promote sustainable and innovative modes of transport. Several opportunities for improvements in the public realm are being explored along the two key route corridors down York Street and Biggin Street/Market Square to the Waterfront. Other identified opportunities include:

- reinvention of the esplanade;
- improvements to market square;
- a reconfiguration of York Street as a single carriageway with separated bus lanes;
- new amenity areas along the River Dour;
- improvements to Folkestone Road/station approach;
- provision of public art;
- general lighting/boulevard and street planting/street resurfacing;
- improved habitat management;
- improving footpaths and lighting across the site to enhance safety; and
- provision of big and small event spaces across the town that promote different areas simultaneously.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

6.21 The 2018 analysis identified that there are 38 multiple retailers in the area surveyed .This includes a number of prominent names including Argos, Boots, WH Smith, New Look, Carphone Warehouse and Superdrug. The centre also has a strong independent retail and service offer. This includes a number of health and beauty retailers, opticians, and clothing retailers. These stores contribute to the overall diversity, vitality and viability of the centre. In summary, we therefore consider that there is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Nonetheless, it will be important to maintain the current level of multiple retailers in order to retain the attraction and vitality of the centre.

MARKETS

6.22 There are number of markets operating within Dover Town Centre. The Bluebird Market, which is situated in the market square runs every Tuesday from 9am to 2pm, and the Farmers' Market runs on the fourth Sunday of each month from 10am to 2pm at Biggin Hall. Both sell fresh organic locally sourced produce such as: eggs, cheese, vegetables, fresh fish and seafood, as well as cushions, greeting cards, accessories and gifts.

6.23 However, based on our site visits to Dover we consider that that the weekly Bluebird Market is currently not achieving its full potential. On the days of our visits the market was lacking in the number of stalls and as such the number of visitors observed was low. It is therefore considered that improvements to the number of market retailers would help to transform the market and attract visitors and local people to the centre. Following our visit, we recommend that additional promotion and marketing should be undertaken, as at present the market is poorly advertised and not very well signposted. A market can provide identity and distinctiveness, encourage exploration and offers an attractive atmosphere. This may be undertaken through active promotion to raise awareness amongst the public through initiatives such as advertising special events, seasonal produce/merchandising and more broadly as part of a broader place making of Dover Town Centre. Additionally, to boost participation at the market further, the Council may want to consider discounts on rent and reducing the pitch prices for traders.

RETAIL DEMAND & REQUIREMENTS

6.24 There are 6 operators with published requirements for representation in Dover equivalent to a total floorspace of between 2,490 sqm and 8,454 sqm gross (26,800 sq ft and 91,000 sq ft gross). These include Select (fashion retailer), Pets @ Home[28], Poundworld, Lidl (South East), One Stop (Midlands & London) and Marstons. Any additional investment would clearly benefit the centre, and therefore opportunities to accommodate the identified demand should be assessed as a priority. It is noted that a Lidl store opened in December 2017 at the White Cliffs Business Park (App. Ref: 16/00976).

PRIME ZONE A RENTS & YIELDS

6.25 The level of rent that businesses are prepared to pay for retail space and yields achieved in investment transactions in a centre provides a further indication of the relative strength of the centre and its prime retail pitch as a shopping location. At end 2017, agent sources estimated prime rents in Dover at £323/sqm (£30/sq ft) in terms of Zone A. This represents no change since 2014 with rents remaining 53.8% below the pre-recession peak of £700/sqm (£65/sq ft).

6.26 Prime retail yields in Dover at the end 2016 stood at 8.50% and have not moved since 2012. This yield is above the Retail Promis average of 6.15%. The UK average for prime high street locations is in the order of 4% - 4.25%[29]. This yield reflects a well let investment, where rental growth is seen as strong. Yields for Dover Town Centre are some way off this level, although the St. James scheme and Waterfront proposals will help to raise the profile and attraction of the centre. In turn, this should attract further interest in the town from investors and may therefore lead to the positive movement of yields.

HOUSEHOLD SURVEY

6.27 We have drawn on the findings of the HTIS to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.

6.28 The survey results shows that 16.9% from the study area (Zones 1-10) visit Dover Town Centre once a week which increased to 19.3% to those living within the Council Area (Zones 1-8). Of those who do visit from the study area (Zones 1-10), 8.1% visited monthly and 36.9% never visited the centre. From the Council Area (Zones 1-8), 34.6% from Zone 1 visited once a week with 35.2% from Zone 2.

6.29 In terms of what people 'like' about Dover Town Centre, the most frequently raised issues are shown in **Table 6.2.**

[28] It is noted that a Pets@Home store is already located at the White Cliffs Retail Park.
[29] UK Retail High Street (Q3, 2017) – Cushman & Wakefield

Table 6.2: Reasons for Visiting Dover Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
Nothing / Very Little	46.30%	46.50%
Close to Home	19.50%	21.00%
Attractive Environment/ Nice Place	7.40%	7.80%
Good Range of 'High Street' Retailers/ Multiples	4.30%	4.10%
Traditional	3.70%	4.00%
Easy to Park	2.30%	2.00%
Close to Friends or Relatives	2.00%	2.10%

Source: HTIS 2017

6.30 As the table shows, the majority of respondents did not have anything specific or overwhelming in particular that they liked about Dover Town Centre. The second popular reason was proximity to home with a smaller proportion stating that Dover was an attractive environment.

6.31 Respondents were also asked what, if anything, they would improve in Dover Town Centre that might encourage them to visit more. The most frequent suggestions are shown in **Table 6.3.**

Table 6.3: Key Improvements for Dover Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
More National Multiple Shops / High Street Shops	30.50%	34.30%
Nothing	26.20%	23.50%
More Independent Shops	24.30%	27.10%
More / Better Comparison Retailers	8.50%	9.30%
Cleaner Streets	5.90%	6.40%

Source: HTIS 2017

6.32 As shown by the tables, a high proportion of respondents suggested improvements to the retail offer within the centre. Almost a third of the respondents appeared to be happy with the town centre as it is.

ENVIRONMENTAL QUALITY

6.33 Whilst Dover is generally tidy and clean, environmental quality does vary across different areas of the centre. Shop fronts and units are reasonably well maintained across the town centre although there are areas of the centre where units would benefit from some modernisation; this can be seen along Biggin Street, particularly those units located centrally close to Pencester Road and Worthington Street. Nonetheless, cleanliness of the shopping streets was considered to be generally good at the time of our site visit.

6.34 Pencester Gardens is a significantly important area of attractive green space located to the east of the main shopping area, off Pencester Road. The gardens also contains a children’s play area and a skate park and offers a central meeting place within the town centre. There is an abundance of seating and litterbins, which help to encourage use of this space.

6.35 Another area of public open space in Dover Town Centre is the Market Square, which is located at Cannon Street and King Street. The Market Square is an attractive pedestrian friendly area with a fountain, and represents a large plaza area for people to meet and rest. The Council is exploring opportunities for improvements in the public realm that will benefit the Market Square along two key route corridors down York Street and Biggin Street/Market Square to the Waterfront. This area together with the proximity to the adjacent Discovery Centre (to the West) and the wider circuit to the new St. James’ (south eastwards) and the Waterfront represents a key area of focus for the town centre. Establishing better linkages to the Discovery Centre and making it part of the wider central square would substantially aid the regeneration of this important area of the town centre.

6.36 It is considered that Dover Town Centre has a good provision of street furniture albeit in varying condition. Tree planting can be seen along the shopping streets, and a number of relatively well-maintained plant boxes exist. Lighting is also good throughout the centre, and there is a good provision of seating and litterbins. Whilst there is a good provision of street furniture, the majority of it appears to be out-dated and in need of modernisation. The provision of more modern street lighting, benches and bins would help to transform Dover into a more vibrant and attractive centre.

6.37 Overall, whilst the town centre benefits from a number of key areas of public open space and a good provision of street furniture, a number of retail units are dated and as such are in need of modernisation to improve the attractiveness of the centre. As such, based on our health check the audit of the town, we consider the environmental quality to be average but with the potential for uplift in the future based on the range of planned public realm initiatives and the potential for the creation of an enhanced central square.

ACCESSIBILITY

6.38 Public transport facilities are reasonable within Dover Town Centre. Dover Priory railway station is situated on the western side of the town centre, and is the southern terminus of the South Eastern Main Line. Trains run from Dover Priory to a number of London stations including St Pancras International (journey time 1hr 5min – 1hr 17min); London Charing Cross (journey time: 1hr 45min – 1hr 55min), London Victoria (journey time: 1hr 30min – 2hr), as well as to Ramsgate (journey time: 36mins – 46 mins) and Sandwich (journey time: 24 minutes) in Kent. These train services are operated by Southeastern. Walking times from the station to the PSA would be between 5 and 10 minutes.

6.39 At the time of writing this report, the Council has been granted £15.8m under the Government's Housing Infrastructure Fund to support the development of a Bus Rapid Transit System (BRT) between Dover Town Centre, Dover Priory railway station and Whitfield. This is anticipated to kick start housing provision at Whitfield and Connaught Barracks and improve connectivity to White Cliffs Business Park. It is also aims to improve traffic congestion and connect new housing provision with the new retail and leisure provision at St. James'.

6.40 The Port of Dover is located 2km from Dover Priory train station; this equates to a circa 25 minute walk. Whilst there is a wayfinding sign by the station exit, the route could benefit from better signage to entice pedestrians from the centre into the PSA. Dover is part of a comprehensive network of regular bus services operated by Stagecoach. The Stagecoach Diamond network provides direct links to the Western Docks of the town as well as Canterbury, Deal and Sandwich.

6.41 Dover Town Centre benefits from being situated in close proximity to the A256 and the A20 which provide direct access to surrounding smaller towns and villages. The town centre itself is dominated by a number of one way roads, which by way of observation makes accessibility difficult. Conversely, whilst this could be perceived as being a poor accessibility issue, we consider that this encourages visitors and residents to use more sustainable forms of transport to navigate the town centre. Nevertheless, Dover Town Centre has a number of short and long stay car parks including Camden Crescent car park, Bench Street car park, and Stembrook car park, the latter two of which are free to park on Sundays.

6.42 According to the Core Strategy (2010), the A20 separates the southern part with the northern part of the town centre making accessibility more difficult. Whilst a seamless link is not present, pedestrian and cycle access is possible via an underpass. The creation of a more direct link between these two parts of the town centre is recommended. Despite this, pedestrian accessibility within the main shopping streets is good; Biggin Street and Cannon Street are pedestrianised, except for the northern end of Biggin Street, where Pencester Road and

Worthington Street meet. Furthermore, wayfinding within the centre of Dover is prevalent and this enables pedestrians to navigate the town with ease.

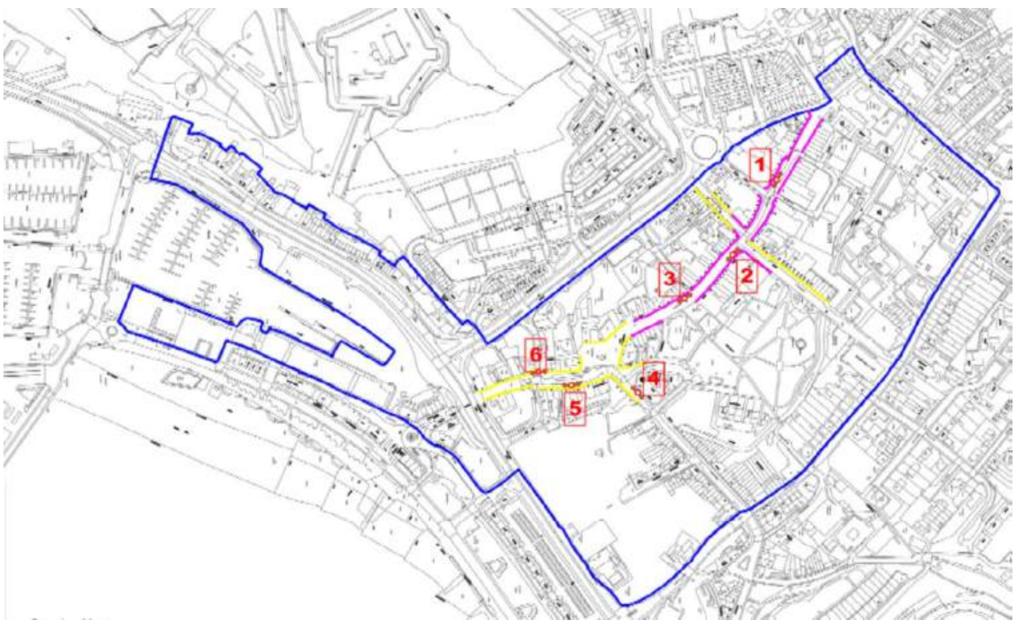
6.43 Overall, whilst public transport accessibility in Dover Town Centre is considered to be good, pedestrian and vehicular improvements are required to join the main town centre with the waterfront and thus overcome the current severing effect of the A20.

PEDESTRIAN FLOW COUNTS

6.44 The Council commissioned a pedestrian flow count (**Appendix 12**) within Dover Town Centre in February 2018 to ascertain typical footfall patterns and before the opening of the St James. The location points were:

- Point 1: 65-66 Biggin Street;
- Point 2: 28 Biggin Street;
- Point 3: 24 Cannon Street;
- Point 4: 69-71 Castle Street;
- Point 5: 15 Market Square; and
- Point 6: 4 Bench Street.

Figure 6.1: Pedestrian Flow Counts



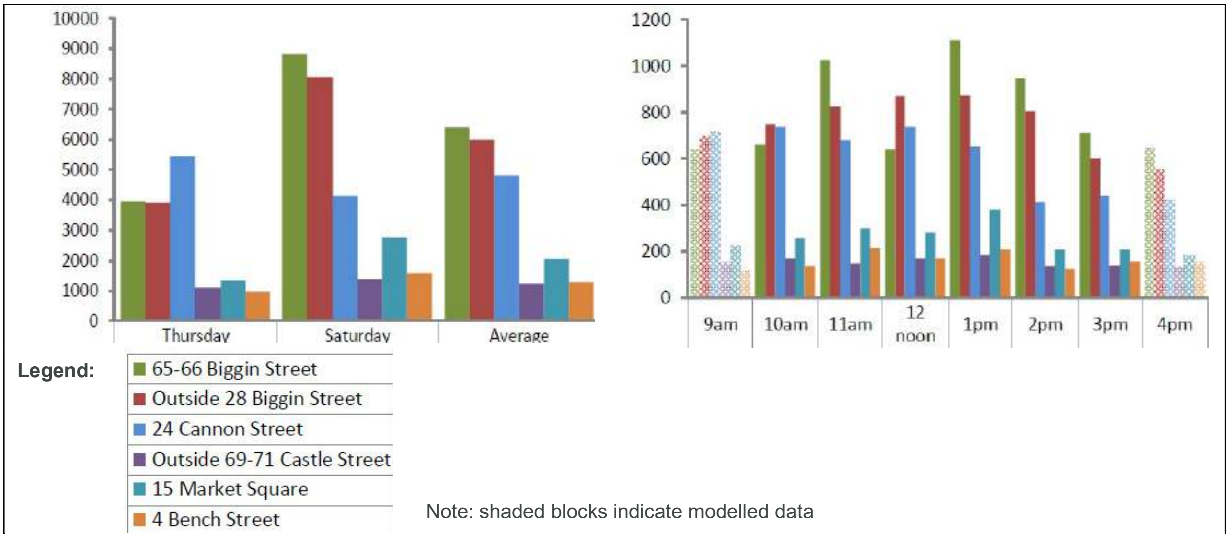
Source: **Appendix 12** - Dover Town Centre Pedestrian Counts

6.45 The output of this survey shows (**Appendix 12**):

- the two Biggin Street locations (Points 1 and 2) were the busiest (see **Figure 6.2**);
- Castle Street (Point 4) and Bench Street (Point 6) registered the lowest footfall;
- Peak footfall is seen between 11am and 2pm with activity declining after 4pm across the centre (see **Figure 6.2)**;
- As with the footfall counts, the two Biggin Street locations showed the highest level of footfall between 11am and 1pm; and

- Cannon Street consistent footfall between 9am and 1pm, but declining from 2pm onwards.

Figure 6.2: Pedestrian Flow Count Patterns by Location and Time of Day



Source: **Appendix 12** - Dover Town Centre Pedestrian Counts

6.46 The above analysis shows that Castle Street, Market Square and Bench Street currently are showing low levels of pedestrian footfall. This is likely to change as the St. James scheme opens and establishes itself.

6.47 Judging by the declining footfall after 4pm the centre appears to have a low visitation in the evenings that has an implication on the evening economy. Again, it can be expected that the opening of St. James' and especially the associated cinema and restaurants, will boost this element of the town centre economy. Venues that stay open throughout the day and late at night also represent important creative and cultural assets for the town centre.

6.48 The Council is recommended to monitor footfall levels periodically throughout the centre.

EDGE AND OUT OF CENTRE PROVISION

6.49 There are a number of out-of-centre provisions around Dover, namely:

- The **White Cliffs Retail Park** is a dominant out of town retail location for Dover, and it lies within the White Cliffs Business Park. The park is situated approximately 2.7km northwest of Dover Town Centre in the area of Whitfield. A number of prominent retailers including B&M Retail Ltd, Pets at Home, Bensons for Beds, and KFC have taken occupation.
- The wider **White Cliffs Business Park** contains a number of large-format out-of-centre stores including an 7,990 sqm (86,000 sq ft) Tesco Extra foodstore, new Lidl foodstore as well as a B&Q DIY store[30].
- In addition to the Tesco Extra Store mentioned above, notable out-of-centre foodstores include Morrisons, Asda and Farmfoods stores at Charlton Green off Bridge Street. **Charlton Green Retail Park** is also located approximately 0.25km from the town centre boundary. The retail park is also occupied by a Poundstretcher store as well as Jollyes Pet Superstore.
- The **Charlton Shopping Centre** is Dover's only purpose building shopping centre and is located approximately 0.2km from the town centre boundary. This edge of centre shopping centre is occupied by predominantly independent retailers and service providers, and has circa. 300 car parking space.

[30] At the time of writing this report Homebase at Honeywood Parkway, Whitfield had closed.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

6.50 As described in **Section 2**, the Dover District Core Strategy (2010) identifies four distinctive development opportunities, including Dover Waterfront, Mid Town, the Former Connaught Barracks complex, and the managed expansion of Whitfield. Whilst not all of these development sites are located within the town centre, they are all likely to have significant impact on the town centre and Dover more generally. The following four Core Strategy policies outline potential new development.

- Policy CP8 (Dover Waterfront) explains that the site is allocated for a mixed use scheme including retail (A1 uses up to 20,000 sqm), restaurants, cafes and drinking establishments (A3 and A4 uses up to 7,000 sqm), assembly and leisure (D2 uses up to 15,000 sqm), residential (C3 uses of at least 300 homes), offices (B1) and hotel (C1) uses. The proposals are to include public transport improvements that will enable the development to operate in conjunction with the main town centre area.
- Policy CP9 (Dover Mid Town) sets out an allocation for mixed use development of C2 uses (residential institutions), C3 (residential of at least 100 homes), A1 shop uses, A3 restaurant and café uses and A4 drinking establishment uses (of up to 15,000 sqm), D1 (non-residential institutions), the redevelopment of South Kent College, and parking to serve both the development and the town centre.
- Policy CP10 (Former Connaught Barracks Complex), which explains that the site is allocated for residential development (C3 use). The development comprises approximately 500 dwellings which will make a contribution to the enhancement of Dover's upper-mid market range of housing.
- Policy CP11 (The Managed Expansion of Whitfield) sets out the final Core Strategy allocation. The site, which is to the west, north and east of Whitfield is allocated for development comprising of a minimum of 5,750 homes supported by transport, primary education, primary health and social care, utility services and green infrastructure along with retail, financial offices, and eating and drinking establishments.

6.51 As previously mentioned, the key scheme for the town centre is the development at St. James (App. Ref: 13/00107). The development is located on the A20, making it both accessible and visible for visitors and local people. It is anticipated that this development will assist in raising the retail profile and catchment draw of Dover Town Centre. Also as detailed previously, it will be important for the Council to monitor pedestrian flow counts across Dover Town Centre. We recommend that this process is repeated periodically. This will aid in understanding and monitoring of shopper movement and footfall across the centre.

6.52 Additionally, we understand that the Council, in partnership with the Port of Dover and a local land owner are in the process of preparing an Action Plan for the Dover Waterfront area. The significant mixed-use development is expected to include residential, retirement living, catering, retail and leisure facilities to revitalise the town and elevate the area's tourism offering. The waterfront regeneration project will be developed as part of the wider Dover Western Docks Revival project, which will ensure the port can utilise its unique location to develop its cargo business whilst supporting the existing ferry, cruise and marina operations throughout the projects' timelines.

6.53 The key message on the new investment at both St. James and the broader waterfront area is that it should complement the town centre and its functions especially in terms of retail provision and enhanced linkages.

SUMMARY

6.54 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Dover Town Centre below:

Strengths

- Historic centre with strong maritime and military heritage.
- Diverse mix of multiple and independent operators.

- Number of key anchor tenants including Marks and Spencer, Argos, Boots, WH Smith, Burton and New Look.
- Strong provision of service outlets with particular strengths lying within the financial and leisure services.
- Highly accessible with good local road, rail and bus network with additional linkages internationally via the Port Terminal.
- Regular street market enhancing diversity of offer.
- Good parking provision.

Weaknesses

- High vacancy rate.
- Long and sprawling centre with no key focus.
- Under representation of convenience goods retailers.
- Lack of critical mass of comparison goods retailers.
- High proportion of charity shops.
- Low order comparison goods offer and draw.
- Dissection in connectivity terms (by virtue of A20) between town centre and Waterfront.
- Visitors using the Port by-pass the town centre.
- Lack of adequate tourist retail / food and beverage provision.
- Lack of large modern retail units in the existing town centre.

Opportunities

- A centre that is identified for inward investment and employment (St. James', Dover Waterfront et al) as well as housing growth.
- Develop strong leadership for town centre initiatives by way of a town centre manager.
- New investment and development at St. James provides focus for rejuvenation of the town centre.
- Improving retail function such as through new investment at St. James`.
- Market Square is an underutilised spatial asset that can be transformed to represent a key focal point for the town centre.
- Develop clear links from Market Square to the Dover Discovery Centre, St James' and the Waterfront.
- The combined transformation of the town centre and Waterfront provides the opportunity to create a destination point to retain and enhance expenditure.
- Key potential development sites earmarked for development (e.g. Dover Waterfront).
- Creating complementary offer between the town centre and Waterfront area to enhance visitation, footfall and linkages.
- Improvement at the Waterfront area to create more retail and leisure opportunities.
- Addition to the critical mass of desired retailers to the town centre.
- Build on the repositioning of town centre based on new investment.
- Branding the retail core to attract both locals and visitors.
- Promote growth of independent high order shops.
- Emerging growth opportunities at Dover Waterfront.

- Consumers' requirement for more national / high street shops, representing a latent demand.
- Better signage to link various parts of the town centre.
- Consolidation of the town centre towards peripheral areas such as High Street and London Road.
- Additional promotion of street markets to attract both locals and visitors.
- Organise seasonal events to invigorate retail all year round utilising a number of key drivers including the street market and the new development at St. James.
- Increase revenue and catchment loyalty from locals and visitors and by active promotion of the town centre and new provision at St. James'.
- Capture more tourism spend.
- Promote town centre to visitors at the Port and orientate tourism visits and associated footfall to town centre.
- Encourage Business Improvement District (BiD) to gather business support for the town centre.
- Capitalise on its historic and maritime heritage and landscape setting by way of co-ordinating marketing initiatives and in directing the flow of visitors from the Port area.

Threats

- Strong competition from centres with critical mass of retail and leisure (such as Canterbury).
- Poor perception of current offer.
- Growth in internet retailing.
- Increasing vacancy rate
- Lack of retailer demand.
- Stagnation reducing viability of future development.
- Rents / rates impact on smaller traders of business rates.

6.55 In summary, there are substantial committed and planned investment and development opportunities over the short, medium and long term that will help the town centre maintain and enhance its overall vitality and viability; specifically through the mixed-use development at St. James (currently under construction) and the proposals for the Waterfront. It is essential that health check performance criteria such as footfall and vacancies are regularly monitored and for the Council to lead a proactive management policy for the continued enhancement of the centre.

7. DEAL HEALTH CHECK

CONTEXT

7.1 Deal is a former fishing, mining and garrison town, located approximately 8 miles north-east of Dover and 8 miles south of Ramsgate. The town has an overriding seaside residential character. Although served by mainline rail services, it is located away from the principal road network and its highway system is quite constrained. Consequently, commercial activity tends to be small-scale, locally based, and dominated by town centre businesses and short stay tourism. Not surprisingly, there is a considerable amount of out-commuting to neighbouring employment centres – especially Dover and Discovery Park (to the north of Sandwich). In 2013 the centre won the Telegraph newspaper's '*High Street of the Year Award*'.

7.2 Deal is defined as a *"District Centre"* in the settlement hierarchy (Core Strategy Policy CP1). It acts as a secondary focus for development in the District; suitable for urban scale development. The town centre boundary extends to Oak Street in the north, Beach Street to the east, Sondes Road to the south and the railway lines to the west.

7.3 Deal has a traditional high street, which runs north to south through the town and forms the centre's heart. Primary shopping frontages extend primarily along the southern and central sections of High Street and secondary shopping frontages extend along the northern section of High Street, as well as Queen Street and Park Street. The town centre is characterised by small-scale development on a historic street pattern, which only offers limited scope for expansion, but the centre is nonetheless well thought of by residents.

RETAIL COMPOSITION & DIVERSITY OF USES

7.4 **Table 7.1** summarises the composition of the centre's retail mix and diversity of uses conducted by the Council (in March 2018) based on the same geographical area as the Goad Category Report produced by Experian in 2016. The output of this new survey is also compared against the 2016 Experian Goad Category Report.

Table 7.1: Current Retail and Service Offer – Units

Category	Number of Outlets		% of Total Outlets		UK (%)	
	2018	2016	2018	2016	2018	2016
Comparison	94	88	36.6%	34.4%	30.9%	31.5%
Convenience	21	25	8.2%	9.8%	8.9%	8.7%
Retail Service	29	31	11.3%	12.1%	14.5%	14.3%
Leisure Service	78	75	30.4%	29.3%	24.0%	23.7%
Financial & Business Service	20	22	7.8%	8.6%	10.3%	10.4%
Vacant Retail & Service Outlets	15	15	5.8%	5.9%	11.2%	11.1%
TOTAL:	**257**	**257**	**100.0%**	**100.1%**	**99.8%**	**99.7%**

Source: Dover District Council (2018) & Experian Goad Category Report (2016)

Convenience

7.5 There are 21 convenience units in the survey area according to the 2018 survey – a decrease from the 25 units stated in the 2016 Experian Goad Category Report. This represents 8.2% of total outlets, which is marginally below the national average of 8.9%. The figures suggest a broadly adequate provision of food and convenience retailing in the surveyed area.

7.6 Convenience provision within the centre is anchored by Sainsbury's located on West Street. Provision also consists of a range of bakers, convenience stores, butchers, fishmongers, grocers and delicatessens, health food stores, off licences, a greengrocers, and a frozen food store.

7.7 Overall, it is considered that Deal has a strong and varied convenience provision. The three markets that are held within the centre enhance this convenience offer by providing a more diverse range of product.

Comparison offer

7.8 In 2018, Deal had 94 comparison goods outlets (88 outlets in 2016). This represents 36.6% of total outlets, which is above the national average of 30.9%.

7.9 Major retailers in the centre[31] include Marks and Spencer, Boots, WHSmith, New Look, Clarks and Superdrug. Additional multiple retailers include Holland and Barratt, Card Factory, M&Co, Savers, and Poundland. The majority of retailers are located along the centre and southern end of the High Street.

7.10 In addition to the strong multiple offer, there are also a high number of independent stores. These are mainly located around the northern end of High Street and help to diversify Deal's comparison offer. There is a good representation of many different categories in the centre including footwear, womenswear and menswear, toiletries and gifts.

7.11 The HTIS results identified that 21.8% of respondents within the study area visit Deal because of the good range of independent shops in the centre. This suggests that these types of stores, including the niche gift shops, are a positive feature of the town centre's overall attraction and should be protected and promoted. Overall, the centre has a good mix of independent and high street stores.

Service Offer

7.12 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Table 7.1** shows, there are 127 service outlets in Deal. They account for 49.4% of all units, which is marginally higher than the national average of 48.8%. The following provides a brief summary of provision in the different service categories:

- There were 29 **retail services** outlets in 2018 (31 in 2016), which represented 11.3% of total outlets. This is below the national average of 14.5%. This category is mostly made up of the hairdressers and health and beauty outlets.
- In terms of **financial services** outlets, there were 20 outlets in 2018 (22 outlets in 2016), which represented 8.6% of total units and significantly below UK average of 10.3%. The mix of services includes 7 property services, 5 retail banks, 3 financial services, 4 legal services, and a building society. It is important to note that there are no careers and employment services available in the vicinity.
- There are 78 **leisure service** outlets in 2018 (75 outlets in 2016); this is the largest provision of service type in the centre. This presents 30.1% of total provision and is significantly above the national average of 24%. Leisure mix includes, amongst others, 16 cafes, 11 fast food takeaways, 13 public houses, 15 restaurants. Leisure destinations also include Deal Castle, nearby Walmer Castle, the Deal Maritime and Local History Museum, and the Timeball Tower Museum.

VACANCIES

7.13 **Table 7.1** shows the number of vacant outlets in Deal is at around 5.8% (15 units) (expressed as a proportion of total (257) outlets), which is considerably below the national average of 11.2%. The vacancy rate has remained broadly similar to that in 2016 of 5.9%. As such, we consider that the centre is performing well in terms of vacancy levels. The lower rate of vacancy can be attributed to the more compact nature of the town centre and the blend of national and independent retailers that offer a diverse product range and meet the needs of shoppers and visitors. By way of comparison, the 2012 RSU identified 20 vacant outlets representing a vacancy rate at the time of 9.5%.

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[31] As defined by Goad as 30 national retailers that are likely to improve the consumer appeal of a centre.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

7.14 The 2018 analysis identified that there are 41 multiple retailers in Deal. This includes a number of prominent comparison retailers including Marks and Spencer, New Look, Boots, and Superdrug, and convenience retailers such as Sainsbury's. The centre thrives from its wide range of independent retailers which contribute significantly to the overall diversity and viability of the town centre's offer.

7.15 The HTIS results identified that 21.8% of respondents within the study area visit Deal because of the good range of independent shops in the centre. In summary, whilst there are a number of prominent national retailers, Deal benefits significantly from its independent retailers which give the centre its character and diversity.

MARKETS

7.16 Deal has three street markets: the farmers market, which occurs the first Saturday of every month lasting from 9.30am–1pm; the town hall market on Wednesday and Friday from 8am–3pm (this market is significantly smaller); and finally the long running Saturday market held at the Union Road car park, 8am-3pm. Each market sells an extensive and diverse variety of freshly produced goods with the Union Road market also offering: clothes, jewellery and toys.

7.17 Overall, the markets attract many of the locals and is efficiently managed with plenty of information available on the internet to promote its location. Whilst the markets provide a point of interest establishing a unique character, they attract only local people rather than external visitors.

RETAIL DEMAND & REQUIREMENTS

7.18 There are 8 operators with published requirements for representation in Deal; equivalent to a total floorspace of between 2,945 sqm (31,700 sq ft) and 8,175 sqm (88,000 sq ft). Operators include Caffé Nero, The Works, Select (fashion), Farmfoods, Poundland, Lidl (South East), KFC (South East) and Marstons. Any additional investment would clearly enhance the existing offer.

PRIME ZONE A RENTS

7.19 No information is available regarding prime zone A rents in Deal.

HOUSEHOLD SURVEY

7.20 The HTIS asked specific questions on respondents' views and perceptions of Deal Town Centre as a place to shop and visit for a wide range of uses and attractions.

7.21 The survey results shows that 15.2% from the study area (Zones 1-10) visited Deal once a week, increasing to 17.6% for those living within the broadly defined Council Area (Zones 1-8). Of those who do visit from the study area (Zones 1-10) 10.3% visit two to three times a week and 35.9% never visit the centre. From the Council Area (Zones 1-8), 45.3% from Zone 4 visited once a week.

7.22 In terms of what people 'like' about Deal Town Centre, the key responses are shown in **Table 7.2:**

Table 7.2: Reasons for Visiting Deal Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
Attractive Environment / Nice Place	48.00%	46.60%
Good Range of Independent Shops	21.80%	19.90%
Close to Home	14.20%	15.40%
Traditional	9.90%	8.20%
Good Pubs, Cafés or Restaurants	7.00%	7.40%
Nothing / Very Little	6.90%	7.50%
Good Range of Non-Food Shops	6.60%	6.90%

Source: HTIS 2017

7.23 As **Table 7.2** shows, the majority of respondents liked the environment of the town centre and its provision of independent shops. Only a small portion of the respondents stated there was very little that they liked about the town centre.

7.24 Respondents were also asked what, if anything, they would improve in Deal Town Centre that might encourage them to visit more. The most frequent suggestions are shown in **Table 7.3** below:

Table 7.3: Key Improvements for Deal Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
Nothing	59.00%	58.40%
More National Multiple Shops / High Street Shops	7.70%	8.80%
More / Better Parking	5.40%	5.40%
More Independent Shops	3.70%	4.30%

Source: HTIS 2017

7.25 As the tables show, a high proportion of respondents appeared to be happy with the town centre as it is. Suggested improvements included enhancing the retail offer (more multiple shops and independent shops) as well as more/better parking.

ENVIRONMENTAL QUALITY

7.26 Based on our health check and audit of the town centre, Deal has a good environmental quality. The centre is generally clean and tidy with a mixture of historic and modern buildings. As previously mentioned, the centre is a winner of the High Street of the year award and also the horticultural South and South East in Bloom (Gold) award. Some prominent features of architectural merit include the clock on the high street, stained glass window frontage above the Le Pinardier wine shop as well as St. George's church on the high street. Whilst the remaining buildings do not display any significant architectural features, they appear well maintained. There may be a need for modernisation of some retail units near the edges of the town centre as a result of poor facades and signage.

7.27 There is a good provision of street furniture within the town centre and this includes a good distribution of bins as well as pleasant and well maintained flower displays. There is also an abundance of public seating within the town centre, particularly along Beach Street, where there are pleasant views across the seafront. There is a good provision of street lighting within the town centre, which helps to create a welcoming and safe environment for both residents and visitors. Despite the abundance of street furniture within the centre, it is considered that there is a need for slight refurbishment of furniture in parts of the town to create a more attractive shopping area. Furthermore, it is recognised that public realm improvements around the Town Hall area will uplift this area further.

7.28 The HTIS results identified that 48.0% of respondents from within the study area visit Deal because it is a nice place and has an attractive environment. As such, environmental quality in Deal is considered to be good overall.

ACCESSIBILITY

7.29 Deal has a good level of accessibility generally. In terms of public transport, Deal railway station is located to the west of the town centre off Queen Street. The station is on the Kent Coast Line and the station and all trains serving it are operated by Southeastern. The typical off-peak service from the station is one train per hour to Ramsgate (19mins-26mins), which continues onwards to Margate (30mins) and the Medway Towns (1hr 24mins - 1hr 54mins) and ultimately to London St Pancras (1hr 23mins - 2hr 10mins). Services to London Charing Cross via Ashford and Tonbridge (2hrs 13mins) operate at peak hours-only.

7.30 As with Dover, Deal forms part of the Diamond Network, a bus network operated by Stagecoach which also includes Sandwich, Dover, and Canterbury. Bus services 13, 13A, 14, 14A, 15, 15B and 15X form this network. Local buses run throughout the day but less frequently in the evening.

7.31 Deal is well-connected in terms of road links; the A258 connects the town to Dover where the M20 and M2 can be easily accessed making it an approximately 2 hour drive from central London. Deal has a number of off-street car parks which serve both the town centre and the seafront. The majority of these are provided by Dover District Council.

7.32 We consider Deal to be easily accessible by pedestrians. The southern section of the High Street is pedestrianised and this helps to create a safe and functional shopping environment. Furthermore, the town benefits from wayfinding signs, which make it easier for visitors to navigate the centre. Despite this, there appears to be a lack of pedestrian crossing points along Beach Street; we recommend these are implemented to help link the seafront to the centre’s high street.

7.33 Overall, we consider Deal to have a good level of accessibility and this contributes to the vitality and viability of the centre.

OUT OF CENTRE PROVISION

7.34 No out-of-centre provision is identified around Deal Town Centre.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

7.35 There are limited opportunities for further development within Deal Town Centre due to the compact nature of the centre and limited supply of development land.

7.36 In terms of Deal’s broader catchment, a number of key housing allocations in the surrounding area will increase its potential catchment population and available expenditure. The following six sites have been identified[32] for residential development and these will provide approximately 800 dwellings:

- Land to the north west of Sholden New Road - 230 dwellings (Policy LA12) (now completed).
- Land between Deal and Sholden – 230 dwellings (Policy LA13) (nearing completion).
- Land between 51 and 77 Station Road, Walmer, Deal – 220 dwellings (Policy LA14)
- Remaining three sites at Mongeham Road, Richards Road and the former Deal County Primary School – 120 dwellings (Policy LA15) (now completed).

[32] Dover District Council: Land Allocations Local Plan (2015)

- Additionally there is an outline application for a mixed use development including 142 residential units, 960 sqm B1 office, 370 sqm A1 & 280 sqm D1 & link road between Albert Rd & Southwall Road.

SUMMARY

7.37 The following provides our SWOT analysis for Deal Town Centre based on the available evidence:

Strengths

- Good range of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.
- Low vacancy rate.
- Strong and varied convenience provision.
- Representation by major retailers including Marks and Spencer, Boots, WH Smith, New Look, Clarks and Superdrug.
- Strong multiple offer supplemented by a high number of independent stores giving centre character and diversity.
- Deal has three street markets providing a point of interest establishing a unique character.
- Good environmental quality.
- Good level of accessibility and well connected to road and rail network.
- Growing demand for retailer representation.
- Good service and leisure offer.

Weaknesses

- Competing higher order centres for shopping (notably Dover and Canterbury).
- Compact town centre constrained by road system and therefore limited expansion opportunities.
- Poor linkage between town centre and seafront.
- Lack of large scale modern format retail units.

Opportunities

- Promotion as a family and tourist leisure destination.
- Attract more food & beverage multiples with a family appeal.
- Improve connectivity between the town centre and seafront.
- Improve signage to beach.
- Gain additional tourism trade.
- Support specialty markets and organise seasonal events to invigorate retail all year around.
- Independent traders working together.
- A town or partnership manager.
- Capitalise on its historic heritage including Deal Castle, Deal Maritime and Local History Museum and the Timeball Tower Museum.

Threats

- Increased competition from larger order centre especially Dover Town Centre as the quality of provision increases.

- Stagnation.
- Limited opportunities for further development

7.38 In summary, Deal Town Centre is performing well against many of the health check key performance criteria. However, given that the expansion of the centre is constrained by its historic street pattern, we consider that the main focus should be to market and promote Deal’s offer and attractions to a wider ‘audience’ to help attract all-year trips that will maintain and enhance its overall vitality and viability as a shopping and leisure destination.

8. SANDWICH HEALTH CHECK

CONTEXT

8.1 Sandwich is a historic Cinque Port and market town on the River Stour, renowned for its medieval street pattern and high concentration of listed buildings. The town centre serves the daily needs of the town itself and neighbouring villages, and is a tourist attraction.

8.2 An international golf course lies to the immediate east of the town; The Royal St George's Golf Club is one of the premier golf clubs in the United Kingdom, and one of the courses on The Open Championship rotation. Additionally Prince's Golf Club is immediately adjacent to the Royal St George's golf club, and both clubs lie on the same stretch of coastline as nearby Royal Cinque Ports Golf Club. These golf clubs of national and international repute are important contributors to the profile and local economy of Sandwich. Royal St George’s in Sandwich is set to host The 149th Open in 2020.

8.3 The Richborough area to the north of Sandwich at Discovery Pak is a major employment centre containing a pharmaceuticals research and development complex of international importance, other small-scale industry and brownfield areas suitable for commercial redevelopment.

8.4 The Core Strategy Policy CP1 designates Sandwich as a “Rural Service Centre” in the settlement hierarchy. The town centre boundary extends to the river in the north; St. Peter’s Street in the east; Short Street, Austins Lane, and Moat Sole to the South, and Harnet Street to the west. Since shopping provision within Sandwich Town Centre is essentially secondary in nature, primary shopping frontages have not been defined. Secondary shopping frontages within the town are defined however; such frontages extend along both sides of Market Street, the Cattle Market, the northern side of Delf Street and along both sides of King Street as far as Short Street[33].

RETAIL COMPOSITION & DIVERSITY OF USES

8.5 **Table 8.1** summarises the composition of the centre’s retail mix and diversity of uses conducted by the Council (in March 2018) based on the same footprint geography as the 2015 Goad Category Report produced by Experian.

Table 8.1: Current Retail and Service Offer – Units

Category	Number of Outlets		% of Total Outlets		UK (%)	
	2018	2015	2018	2015	2018	2016
Comparison	39	37	35.1%	35.6%	30.9%	31.5%
Convenience	9	10	8.1%	9.6%	8.9%	8.7%
Retail Service	15	13	13.5%	12.5%	14.5%	14.3%
Leisure Service	28	25	25.2%	24.0%	24.0%	23.7%
Financial & Business Service	14	9	12.6%	8.7%	10.3%	10.4%
Vacant Retail & Service Outlets	6	10	5.4%	9.6%	11.2%	11.1%
TOTAL:	**111**	**104**	**100.0%**	**100.0%**	**99.8%**	**99.7%**

Source: Dover District Council (2018) & Experian Goad Category Report (2016)

[33] To note that Policy LA 18 of the Dover District Land Allocations Local Plan (2015) provides, *inter alia*, that in Sandwich Town Centre, Planning permission will only be given for A1, A2, A3, A4 and A5 uses within the ground floor premises in the designated Sandwich Secondary Shopping Frontage.

Convenience

8.6 There are 9 convenience units in the survey area according to the 2018 survey – a marginal decrease from 10 units in the 2015 Experian Goad category Report. This currently represents 8.1% of total outlets, which is marginally below the national average of 8.9%. The figures show an adequate provision in the convenience offer.

8.7 The main food and convenience store in the town is the Co-op, which is located on Moat Sole. Provision also consists of, amongst others, a baker, a butcher, a convenience store, a greengrocer and an off license. The two markets that operate within the centre also support convenience retailing in Sandwich. As such, Sandwich's convenience provision appears to be serving well its local population.

8.8 Overall, we consider Sandwich to be performing well in terms of convenience provision.

Comparison Offer

8.9 In 2018, Sandwich has 39 comparison goods outlets (37 outlets in 2016). This represents 35.1% of total units and is above the national average of 30.9%. Boots is the only major comparison multiple retailer[34] and the majority of stores are independently owned.

8.10 There is a good representation of many different categories in the centre including antique stores, chemist/ drug stores, jewellers, ladies and menswear stores, gift shops, and second hand book stores. This provides an indication that Sandwich is a diverse shopping location, which appears to attract both local people and visitors to the area. As such, we consider the centre to be performing well in terms of its overall comparison provision.

Service Offer

8.11 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Table 8.1** shows, there are 57 service outlets in Sandwich (47 in 2015). These accumulate to 51.4% of all units which is above the national average of 48.8%. The following provides a brief summary of provision in the different service categories.

- There were 15 **retail services** outlets (13 outlets in 2015), which accounted for 13.5% of total outlets which is slightly below the national average (14.5%). This category is mostly made up of health and beauty outlets including hairdressers, nail bars, and beauty salons.
- In reference to **financial services,** there were 14 outlets (9 outlets in 2015), which represented 12.6% of total units and is above the national average of 10.3%. This category is composed of 6 property services, a retail bank, a building society and 3 legal service outlets.
- There are 28 **leisure services** outlets (25 outlets in 2015). This represents 25.2% of total provision and is higher than national average 24%. Leisure provision consists, amongst others of, 7 cafes, 3 public houses, 5 restaurants, 3 fast food takeaways, 2 hotels and guest houses and a cinema. The Empire Cinema on Delf Street is one of the centre's popular leisure service outlets.

8.12 In summary, service provision in Sandwich is considered to be good and is serving its local population well.

VACANCIES

8.13 Sandwich Town Centre had 6 vacant outlets representing a vacancy rate of 5.4% (10 vacant outlets in 2015, vacancy rate of 9.6%). This is considerably below the national average of 11.2%. Overall, we consider that the centre is performing well in terms of vacancy levels. By way of comparison, the 2012 RSU identified 13 vacant outlets representing a vacancy rate at the time of 13.8%.

[34] As defined by Goad as 30 national retailers that are likely to improve the consumer appeal of a centre.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

8.14 The 2018 analysis identified that there are 10 multiple retailers in the area surveyed. This includes key retailers such as Boots, Costa, and the Co-op. The majority of the provision is dominated by independent retailers/service providers as well as traders in the street markets. Consultation with key stakeholders revealed that the independent retailers are a key strength within the town and make an important contribution to the centre's overall diversity, vitality and viability.

8.15 In summary, there is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Such retailers positively add to the character of the centre, and its overall vitality.

MARKETS

8.16 There are two street markets in Sandwich Town Centre. Sandwich Farmer's Market is held on the Guildhall Forecourt on the last Saturday of every month (9am – 4pm) and includes stalls with fish, game, organic meats, olives, cheeses, fresh flowers, plants, eggs, fruit and vegetables, cakes and wholefoods. The Sandwich Market is held at Guildhall every Thursday morning (10am – 1pm). According to a number of key stakeholders within the town, the markets are relatively popular amongst local people, however they do not attract visitors to the centre from further afield.

RETAIL DEMAND & REQUIREMENTS

8.17 There is one requirement for representation by Farmfoods of between 557 sqm (6,000 sq ft) and 743 sqm (8,000 sq ft).

PRIME ZONE A RENTS

8.18 No information is available regarding prime zone A rents in Sandwich.

HOUSEHOLD SURVEY

8.19 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Sandwich town Centre as a place to shop and visit for a wide range of uses and attractions.

8.20 The survey results shows that the overwhelming majority of the respondents (65.5%) from the study area (Zones 1-10) never visit Sandwich for shopping and town centre uses. Of those that do, 6.5% visit three to four time a year and 4.3% visit once a week.

8.21 In terms of what people 'like' about Sandwich Town Centre, the most frequently raised themes are shown in **Table 8.2.**

Table 8.2: Reasons for Visiting Sandwich Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
Attractive Environment / Nice Place	44.20%	43.80%
Traditional	16.20%	15.80%
Good Range of Independent Shops	15.50%	14.20%
Good Pubs, Cafés or Restaurants	10.20%	9.70%
Quiet	9.40%	9.90%
Nothing / Very Little	6.60%	7.30%

Source: HTIS 2017

8.22 As the table shows, the majority of respondents like the town's environment and its traditional character, along with the provision of independent shops, pubs, cafés and restaurants. Only a small proportion of the respondents stated there was very little that they liked about the town centre.

8.23 Respondents were also asked what, if anything, they would improve in Sandwich Town Centre that might encourage them to visit more. The most frequent suggestions are as follows:

Table 8.3 Key Improvements for Sandwich Town Centre

Response	Study Area (Zones 1-10)	Council Area (Zones 1-8)
Nothing	61.10%	61.60%
More / Better Parking	4.60%	4.80%
More National Multiple Shops / High Street Shops	2.90%	3.10%
Free Car Parking	2.20%	2.40%

Source: HTIS 2017

8.24 As the table shows, a high proportion of respondents like the town centre as it is. Suggested improvements included more/better or free parking and enhancing the retail offer (more multiple shops and independent shops).

ENVIRONMENTAL QUALITY

8.25 Sandwich is a historic and traditional town which still has many of its original medieval buildings and a significant number of heritage assets. The town centre benefits from a traditional and pleasant shopping environment. The well-kept shop fronts and clean surroundings contribute to the quality of the environment.

8.26 There is a cobbled area immediately in front of the Guildhall. This area of land has public seating and flower boxes which makes it a good meeting point within Sandwich and the regular weekly market. We understand that the Council has recently commissioned consultants to prepare a planning application to reinvigorate this important area of open space. Subject to planning permission being granted, an application for funding will be submitted to the Coastal Communities Fund. The rest of the centre is lacking in planting and green space and as such these improvements should be sought.

8.27 The HTIS results identified that a significant proportion of respondents from within the study area visit Sandwich because of its attractive environment; 44.3% of respondents stated this. Overall, Sandwich is considered to be performing well in terms of environmental quality.

ACCESSIBILITY

8.28 The town is served by Sandwich train station, which is situated approximately 0.35km south east of the town centre boundary. The station, and all trains which serve it, are operated by Southeastern. The typical off-peak service from the station is one train per hour to Ramsgate and one train per hour to London Charing Cross (2hr 6mins – 2hr 30mins) via Folkestone (33mins) and Sevenoaks (1hr 46mins – 1hr 52mins). These services are increased to half-hourly during peak hours. Furthermore, there are three services daily to London St Pancras via the High Speed 1 route through Dover, which takes approximately 90 minutes.

8.29 Like the other town centres in the District, Sandwich is on the Diamond Network, a bus network operated by Stagecoach which also includes Canterbury, Dover and Deal. The Diamond route from the town is 13 and 14 to Canterbury, where it is possible to transfer to the rest of the network as well as other routes. Additionally, local bus routes 87 and 88 between Dover and Ramsgate, and route 89 between Dover and Canterbury also serve the town.

8.30 Sandwich is also relatively well-connected in terms of road links. The town is situated approximately 1.2km east of the A256 which provides connections to Dover and to towns to the north such as Margate and Ramsgate. Within the centre itself, roads are narrow and consequently there is a network of one way roads which helps to control traffic flow. A number of key stakeholders within the centre identified traffic to be an issue within the centre, largely caused by HGVs' moving through the town.

8.31 There are a number of car parks within the centre, the majority of which are operated by Dover District Council. The Quay car park has capacity for 146 cars, the Guildhall car park has capacity for 188 cars, and the Gazen Salts car park holds 101 cars. There is also on-street parking within Sandwich on both Market Street and New Street. Although parking provision within the centre is adequate, it is considered that there is a lack of free parking within the centre. There is also an apparent need to improve coach parking facilities since organised tourist visits to the centre result in difficulty accommodating coaches.

8.32 We consider pedestrian accessibility within the centre to be adequate. Whilst there are narrow pavements which make it difficult for visitors, especially disabled visitors, to move through the town, many of the centre's street are quiet and residential in nature. Therefore streets are generally more traffic safe and pedestrians can cross the road with ease.

8.33 In summary, accessibility in Sandwich Town Centre is considered to be good.

OUT OF CENTRE PROVISION

8.34 No out-of-centre provision has been identified around Sandwich Town Centre.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

8.35 There is no planned new investment in the centre.

SUMMARY

8.36 Our SWOT analysis for Sandwich Town Centre is as follows based on the KPIs and available evidence:

Strengths

- Historic centre with medieval heritage.
- Key visitor attraction.
- Key golfing location of repute.
- Varied convenience provision.
- Good and complementary mix of multiple and independent retailers
- Independent retailers contributing to the centre's uniqueness and diversity.

- Good environmental quality.
- Good level of accessibility and well connected to road and rail network
- Good level of service provision.
- Well used street markets.
- A well connected centre.

Weaknesses

- Low representation from national multiples.
- Lack of large scale modern retail units.
- Competing higher order centres for shopping.
- Narrow roads causing congestion.
- Impaired movement for large vehicles such as trucks and coaches that contribute to congestion.
- Inadequate parking for tourist coaches.
- Compact town centre constrained by road system.

Opportunities

- Promotion of the town centre during golfing tournaments.
- Support and promote markets activity and organise seasonal events to invigorate retail all year around.
- Promote markets as part of tourist offer.
- Capitalise on tourism spend associated with the centre's historic medieval heritage.
- Update street furniture and promote planting and green space provision across the centre.
- Improve a parking for tourist coaches.

Threats

- Increased competition from larger order centres (especially Dover, Deal and Broadstairs).
- Limited opportunities for further development.
- Lack of multiple retailer demand.

8.37 In summary, Sandwich Town Centre is a healthy and viable centre that serves its local resident catchment population, as well as visitors and tourists to the area. It is performing well against many of the health check key performance criteria. Over the long term, development potential is limited due to the historic layout of the town centre, as well as the large number of listed buildings. On this basis it is important to maintain the current provision and enhance this by capitalising on the centre's historic and tourist draw.

9. LOCAL CENTRES AND VILLAGES

9.1 The NPPF seeks to ensure vitality and viability of "Town Centre" (see Chapter 2 of the NPPF). The NPPF states that the "Centre" definition applies to "to city centres, town centres, district centres, and local centres but excludes small parades of shops of purely neighbourhood significance" (see p.57 – Town Centre Definition).

9.2 To inform the Study, the Council provided Carter Jonas with a list of Local Centres and Villages, and this is provided in **Table 9.1** below.

Table 9.1: Local Centres and Villages within Dover District Council Area

Centre Type	Listing
Proposed Rural Service Centre	Aylesham
Local Centres	Ash, Capel-le-ferne, Eastry, Shepherdswell, Wingham
Villages - Settlements With Development	East Langdon, East Studdal, Elvington, Eythorne, Great Mongeham, Kingsdown, Lydden, Nonington, Ripple, St. Margarets, Staple, Woodnesborough, Worth.
Villages - Settlements Without Development	Alkham, Goodnestone, Preston[35], Ringwould, West Hougham

9.3 As part of the Study, a high level review of the Local Centres and Villages is detailed below.

PROPOSED RURAL CENTRE

Aylesham

9.4 Aylesham is a small village that was built in the 1920's to provide housing for the miners who came to work in the Kent coal-mines. Following the closure of the pits in the 1980s, a wide range of community initiatives have been introduced to provide new leisure facilities and employment opportunities.

9.5 The Aylesham Masterplan was adopted as a Supplementary Planning Guidance (SPG) in 2004 and envisages a variety of residential, commercial, employment, educational, recreational and community uses. The key components of the Plan includes provision for some 1,100 new homes.

9.6 In terms of retail provision this is centred on Market Place which encircles a public park and is also adjacent to both existing and new residential development and a health centre. There is on-street parking provision on Market Place. The retail and service provision comprises of a Co-op foodstore, Boots pharmacy, a smaller convenience store, a butcher, a post office and two fast food takeaways. The environmental quality of the centre is good with no signs of dereliction.

LOCAL CENTRES

Ash

9.7 This is a linear centre interspersed by residential development. The centre benefits from a small number of retail units including a Co-op, a convenience store, a post office, two fast food takeaways, a hairdresser and a nail salon. The centre is served by on-street parking, which at the time of our site visit, caused traffic to build up along The Street. The environmental quality of the centre is good with no signs of dereliction, graffiti, or litter.

Capel-le-ferne

9.8 The centre is located off the B2011 New Dover Road. It comprises of one retail unit, a local convenience store, which is set within a residential area. The store has off-street parking provision for circa 6 cars and the centre is

[35] At the time of writing this report Preston has 73 units under construction (Salvatori site)

also served by lay-by parking on the New Dover Road. In addition, there are two bus stops serving the local area. The overall environmental quality of the centre is considered to be good.

Eastry

9.9 The centre comprises a series of retail units within a relatively busy thoroughfare. The key businesses include a Premier village shop, a pubic house, two fast food takeaways, a pharmacy, two hair and beauty salons, a newsagent, a butcher, a baker, and a motorbike dealership. Retail units are spread along High St and are intermixed with residential development. At the time of our site visit there were no vacant units. Whilst the centre is clean, some shop fronts are dated and not well-kept and as such some modernisation is recommended.

Shepherdswell

9.10 The centre is characterised by two retail units that primarily serve a walk-in catchment set within a predominant residential area. The centre has no dedicated parking area, but there are parking spaces in the adjacent residential areas. The centre is dominant by the Co-op located on Eythorne Road, however there is also the Shepherdswell Post Office on Church Hill. The overall environment of the centre is good.

Wingham

9.11 The centre comprises of a range of retail units spread along High Street. The retail composition of the centre is rather dispersed and is scattered amongst residential development. Retail provision consists of a guitar shop, a bakery, a ‘best-one’ convenience store, a newsagents, a post office, a public house, a restaurant, a coffee shop, an estate agent and a bank. The centre is served by on-street parking and there are two bus stops are located opposite the retail units contributing to footfall. At the time of our site visit there were no vacant units, which indicates it is both a vital and viable centre.

VILLAGES – SETTLEMENTS WITH DEVELOPMENT

East Langdon

9.12 East Langdon is primarily a residential centre and there is no notable retail development.

East Studdal

9.13 The centre is wholly residential in nature located around on Homestead Lane and Downs Road.

Elvington

9.14 The centre comprises of a series of retail units located within a parade and serve a primarily residential catchment population. The retail and service mix consists of a village store, a hairdresser, a florist, and two fast food takeaways. Whilst the centre has no specific parking for the retail units, it is served by sufficient on-street parking. Environmental quality of the centre is mixed as a number of retail units have modern and well-kept shop frontages, whereas some show signs of dereliction.

Eythorne

9.15 The centre is composed of a cluster of retail and service units at the junction of Chapel Hill and Sandwich Road, which serve an immediate residential neighbourhood catchment. The units are all independently owned and consist of a village store/post office, a hairdresser and a vehicle repair workshop. A public house is also located in close proximity on The St. The centre is served by on-street parking and over it appears to have a good environmental quality.

Great Mongeham

9.16 Great Mongeham is a residential centre with no observed retail provision.

Kingsdown

9.17 The centre comprises of a range of retail and service units spread predominantly along Upper Street. The centre is located within a residential area with the primary concentration of shops served by residential units above them. The retail composition of the centre comprises of three public houses, a butcher and delicatessen, a hairdressers, a post office, and a village shop. To the south of Upper Street are a number of holiday parks and camp sites which contribute to footfall within the centre. The centre is served by bay parking in front of the individual retail units and there is space for circa 6 cars. The centre has good overall environment with no signs of dereliction, graffiti or litter.

Lydden

9.18 The service units are interspersed amongst residential units and along a predominantly residential thoroughfare. Although there are no retail units, service units consist of one public house, Doctor’s surgery and a vehicle repairs workshop. There are a number of bus stops spread along Canterbury Road which serve the centre. The centre is located in a pleasant setting and it feels rural in nature. As such, it is considered that the centre’s environmental quality is good.

Nonington

9.19 Nonington is a residential centre that is served by a primary school and a church. There is no retail development within the centre.

Ripple

9.20 The centre is almost wholly residential in nature, with the exception of one public house, the Plough Inn, which is located on Chapel Lane. The public house has a large area of private car parking for visitors, and the centre is additionally served by two bus stops located on Mongeham Road. The centre has a rural setting and the environmental quality of the area is considered to be good.

St. Margarets

9.21 The centre is predominantly residential nature and is characterised by a number of sporadic retail units along High Street. The retail offer primarily consists of a village shop, two public houses, a post office, a hotel, and two estate agents. Not only does the retail offer meet the needs of the local population, but it also serves the surrounding holiday parks and campsites in the local area. The centre benefits from an off-street car park and public toilets. At the time of our site visit there were no vacant units and we considered the centre to be of a good environmental quality.

Staple

9.22 Staple is a residential centre that is served by a church and a village hall. There is no retail development within the centre but the centre benefits from a public house; this is the only service unit in the centre. The public house has a large private car park for visitors. The centre has a pleasant rural setting and as such environmental quality is of a good level.

Woodnesborough

9.23 The only retail unit within the centre is a car/motorbike sales unit located on Beacon Lane. Woodnesborough has a rural setting and is residential in nature, with houses spread sporadically along Beacon Lane predominantly. Overall, the environment of the centre is good.

Worth

9.24 Located along The St, the centre comprises of two public houses set within a residential area. Although there is no dedicated public parking in Worth, there is ample off-street parking. The centre is located in a pleasant setting and the churchyard of the St. Peter and St. Paul provides a green backdrop. The centre is served by a number of bus stops located on The St and Jubilee Road, which make it relatively accessible and these contribute to the centre’s footfall.

VILLAGES – SETTLEMENTS WITHOUT DEVELOPMENT

Alkham

9.25 Alkham is a rural settlement characterised by dispersed residential development. The centre is served by a village hall and a church. In terms of retail and service provision, there is one restaurant in the centre (with an own private car park), garden centre and equestrian shop. Alkham benefits from two bus stops located on Alkham Valley Road which makes the centre accessible from the surrounding area. The environmental quality of the centre overall is considered to be good.

Goodnestone

9.26 The centre comprises of a one public house located on The Street, and this is surrounded by residential development. The centre has a rural setting and benefits from a pleasant, green environment. Whilst there is no dedicated public parking in Goodnestone, there is plenty of off-street parking.

Preston

9.27 The centre is composed of sporadic retail units along a predominantly residential thoroughfare. There is no concentration of retail units and its retail and service offer primarily consists of a village store, a butchers, a garden centre and a public house. The centre is serve by four bus stops, which are spread along The Street. The centre benefits from lay-by parking, which provides space for circa 5 cars; there is also additional on-street parking on adjacent streets. The overall environment of the centre is good.

Ringwould

9.28 The centre is located at the junction of Dover Road and Ringwould Road. It is almost wholly residential in nature, with the exception of one public house and a hostel. Whilst the centre has no parking provision, its environmental quality is considered to be good.

West Hougham

9.29 West Hougham is a residential settlement located rurally. There is no retail development in the centre.

10. QUANTITATIVE RETAIL NEED ASSESSMENT

10.1 This section provides an update on the key assumptions and forecasts underpinning the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the Council area up to the plan period to 2037. The assessment updates and supersedes the retail capacity findings identified in the 2012 Dover District Council: Retail Study Update (‘*2012 RSU*’).

10.2 The ‘baseline’ capacity tabulations for convenience goods and comparison goods are set out in **Appendix 9** and in **Appendix 10** respectively. The capacity forecasts are based on the population growth projections from Experian (derived from the Office of National Statistics’ (ONS) and Experian’s 2016 mid-year estimates projected forwards)[36].

10.3 The following describes further the key steps and assumptions underpinning the retail capacity assessment.

BASELINE ASSUMPTIONS & FORECASTS

Population Projections

10.4 As indicated above, the capacity forecasts are based on the population growth projections from Experian (derived from the Office of National Statistics’ (ONS) and Experian’s 2016 mid-year estimates projected forwards). These forecasts have necessarily been utilised as the Council’s own future housing allocations had not been determined at the time of writing this report.

10.5 By way of background information, the Council’s Strategic Housing Market Assessment (SHMA)[37] shows a +10.7% growth for the Council area between 2017 and 2037 from +114,915 to +127,242.

10.6 **Table 1, Appendix 2** (convenience goods) and **Table 1**, **Appendix 3** (comparison goods) sets out the base year (2017) population and projections sourced from our in-house Experian MMG3 Geographic Information System (GIS). It also shows the population projections over the plan period to 2037 based on Experian’s ‘demographic component model’, which takes into account age, gender, birth rates, ageing, net migration and death rates.

10.7 Experian’s population projections show a +12% growth for the study area as a whole between 2017 and 2037; from 136,134 to 152,447 (+16,313). In contrast, for the District as a whole, the growth is lower at +11.0%; from 115,631 to 128,403 (+12,772).

10.8 At the time of writing this report the Experian projections[38] (+11.0%) shows a marginally higher rate of growth for the Council area when compared to the Council’s SHMA[39] of +10.7% growth (from +114,915 to +127,242). Given that this assessment does not take account of increasing population growth arising from housing allocations we therefore recommend at the outset that a ‘refresh’ of the capacity outputs is undertaken once the Council has finalised its allocation of future housing across the District.

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[36] The Experian 2016 mid-year population estimates are created from a variety of small area data sources to estimate and track household population change over time, including 2011 Census results and Postal Address File formation. The estimates take account of changing postal geography. They are also calibrated to Local Authority District/Unitary Authority level (LAD/UA) targets based on the most recently available Government change rates. Targets for mid-2016 are created by adjusting these estimates using information from 2011 Census based projections and government change rates. Experian’s demographic component model uses the 2016 mid-year age and gender estimates as a base and then projects the population forward year-on-year.

[37] Dover District Council: Strategic Housing Market Assessment - Part 1, Table 5.2, Page 27.

[38] Generated in February 2018 and based on the latest 2016 mid-year estimates.

[39] Dover District Council: Strategic Housing Market Assessment - Part 1, Table 5.2, Page 27. As previously detailed, Experian projections yield an annualised growth rate of 0.52%pa (2016-2036) compared with 0.51%pa (2016-2035) based on the Council’s SHMA. On this basis the Experian projections were agreed with the Council and utilised for this study.

Expenditure per Capita & Special Forms of Trading (SFT)

10.9 The revised per capita expenditure and growth forecasts for each study zone are set out in **Appendix 2** for convenience and **Appendix 3** for comparison goods. The base year average expenditure figures have been derived from our in-house Experian MMG3 GIS based on 2016 prices.

10.10 In identifying average expenditure levels, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. The most appropriate allowance for SFT has been informed by the results of the HTIS. The survey-derived market share analysis (**Table 1, Appendix 3**) shows that some 24.5% of all comparison goods expenditure in the defined study area was accounted for by internet and non-store sales (including mail order purchases) (24.2% in the Council area). For convenience goods SFT accounted for 5.6% of total available expenditure in the study area (5.3% in the Council area) (**Table 1, Appendix 2**).

10.11 The expenditure per capita figures by zone have been grown year-on-year based on the latest Experian Retail Planner Briefing Note 15 (RPBN) published in December 2017. As described in **Section 3**, Experian forecast more limited year-on-year growth in convenience and comparison goods expenditure than previous forecasts.

10.12 Our allowance for SFT at the local level has been informed by the results of the household survey, benchmarked against Experian's SFT market share forecasts for convenience and comparison goods. The survey-derived shares have necessarily been adjusted downwards to reflect the fact that a proportion of online food and non-food sales are sourced from traditional stores rather than from dedicated ('dotcom') warehouses[40]. This is in compliance with the advice set out in Experian's latest RPBN. The adjusted SFT market share for comparison goods is 18.4% in 2017, which is above the Experian national average figure of 14.8%. In contrast the locally adjusted SFT market share for convenience goods of 1.7% is below the national average of 3.2%.

Average Expenditure Growth Forecasts

10.13 The growth in average expenditure per capita levels over the plan period (up to 2037) has been informed by the forecasts set out in Experian's latest Retail Planner Briefing Note 15 (December 2017) (Figure 1a). Experian's forecasts show for:

- **convenience goods** – negative forecast annual growth in the short term (-0.6% in 2018 and -0.2% in 2019), before averaging at +0.1% for future years; and
- **comparison goods** - forecast annual growth of +0.9% in 2018, +2.1% in 2019 and averaging at +3.2% over the medium (up to 2023) to long term (2037). This forecast growth is lower than long-term historic (1997-2016) trends of +5.6%.

Total Available Expenditure

10.14 Total available retail expenditure in the study area is derived by multiplying the population and average expenditure per capita levels together. The forecasts for the plan period (2017 to 2037) show:

- **convenience goods**: +11.8% (+£36.5m) growth in total convenience goods expenditure by 2037 across the study area (Table 3, **Appendix 2**);
- **comparison goods**: +93.5% (+£393.6m) growth in total comparison goods expenditure to 2037 across the study area (Table 5, **Appendix 3**); and

[40] Drawing on Experian's latest research we have assumed that some 25% of SFT convenience goods sales and 70% of comparison goods sales are sourced from traditional ('physical') retail space.

10.15 The growth in comparison goods expenditure significantly outstrips convenience goods spend, which means that there should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods.

'Inflow' and Base Year Turnover Estimates

10.16 In order to provide a complete picture of the current trading (turnover) performance of the District's main centres and stores we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined study area. In the absence of published turnover and trade draw information for centres and retailers our inflow assumptions have necessarily been informed by previous studies[41] and retail assessments, as well as the household survey. The 'inflow' assumptions also take account of:

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

10.17 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing the Council area's main centres and larger shopping facilities will draw a proportion of their shoppers and trade from outside the defined study area. On the other hand smaller stores and local centres will draw the majority of their shoppers and trade from within their more localised catchments, with limited or no 'inflow' from outside the study area. These trade draw estimates are informed by retail spend from the previous study (*2012 RSU*) as well as other factors including, inter alia, the location, scale and attractiveness of the retail offer in each centre/store; accessibility and parking provision; the distribution of competing centres/stores both within and outside the study area; and the retail expenditure derived from tourists, day-trippers and commuters living outside the study area. We have assumed the following rates:

- For **convenience goods** it is assumed that the main stores in Dover Town Centre will achieve an expenditure 'inflow' of approximately 10% from outside the defined study area. We have assumed that both Deal and Sandwich Town Centre's main stores will achieve an inflow of 5% based on the scale and quality of their offer. All other local centres will achieve an inflow of 2%. It has also been assumed a net 'inflow' of expenditure of 10% for the main out-of-centre foodstores; namely Aldi, Cherry Tree Avenue, Dover, Asda Supermarket, Charlton Green, Dover, Morrisons, Bridge Street, Dover and Tesco Extra, White Cliffs Business Park, Whitfield, Dover.
- For **comparison goods**, we have assumed an inflow rate of 15% for Dover, 10% for Deal and 10% for Sandwich. For other smaller local centres we assumed inflows from outside of 2%. For the key out-of-centre locations at Honeywood Retail Park (B&M, Bensons for Beds, Pets at Home), Whitfield and White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield we have allowed for a 5% inflow to reflect the scale, quality and range of the non-food offer in these areas.

10.18 Based on the (survey-derived) market analysis and the 'inflow' assumptions, **Appendix 9** sets out the revised turnover estimates for convenience across the main centres with estimates for comparison goods turnover presented in **Appendix 10.**

[41] 2012 Dover District Council: 2012 Retail Study Update (2012 RSU).

Planned Commitments & New Development

10.19 In terms of retail commitments, **Table 2, Appendix 9** sets out planned retail floorspace identified for convenience goods and in **Table 2, Appendix 10** for comparison goods. Floorspace data has been provided by the Council and the evidence submitted in support of planning applications for each scheme.

10.20 The total convenience goods floorspace committed is 6,203 sqm net. This includes:

- **Planning Reference 13/00907 (St. James' Site (DTIZ) – St. James' site between Townwall Street, Castle Street, Russell Street, King Street, Woolcomber Street, Dover -** Demolition of existing buildings to provide 7,429 sqm gross of retail (A1) floor space in 2 main blocks together with 2,472 sqm of cinema (D2) floor space, 1,060sqm of restaurant (A3/A4) in a further block and 44 sqm gross of retail (A1) in a kiosk to Flying Horse Lane, together with associated car parking, highway works and landscaping at St James Site (DTIZ) generally between town wall Street, Castle Street/King Street, Russell Street, Woolcomber Street and including land fronting Flying Horse Lane. We have assumed a total gross floorspace figure of 7,473 sqm gross (7,429 sqm gross plus 44 sqm gross). Of this gross floorspace we assume that the net floorspace will be 5,231 sqm net (i.e.70% of total) of which 1,046 sqm (20%) will be for convenience goods and 4,185 sqm (80%) for comparison goods.
- **Planning Reference: 16/00976 – Land at Honeywood Parkway, White Cliff's Business Park, Dover -** Erection of detached retail store (to be occupied by Lidl) (2,760 sqm gross internal floor space, including mezzanine) together with provision of 159 car parking spaces and associated landscaping. We have assumed a gross to net ratio of 70% to derive a trading floorspace of 1,932 sqm net. Of this net floorspace it is assumed that 80% is for convenience goods (1,546 sqm net) and the remaining 20% for comparison goods (386 sqm net).
- **Planning Reference 10/01011 – Land to East of Sandwich Road and North West of Napchester Road, Whitfield, Dover (Whitfield Urban Extension) -** Outline Application for the construction of a new community hub/district centre, comprising BRT hub, health and social care centre (class D1) and police office (Class B1) totalling up to 1,900 sqm, retail space (class A1-A3) and employment space (Class B1(A) totalling up to 2,725 sqm, and 100 no. 2-5 bed residential units including 6 supported living units (class C3) provision of learning and community campus to incorporate secondary energy centre, new 420 place primary school including early years provision and provision of access arrangements. In terms of deriving the retail provision we have assumed a gross to net ratio of 70% to derive a net A1-A3 floorspace of 1,330 sqm net. Of this we assume that retail floorspace (i.e. A1 only) will be 931 sqm net (i.e.70% of total). Finally of this net derived floorspace we have assumed that 70% will be for convenience goods (652 sqm net) and 30% for comparison goods (279 sqm net).
- **Planning Reference 15/01290 – Land on the West side of Albert Road, Deal -** Outline Application for a mixed use development including 142 residential units, 960 sqm B1 office, 370 sqm A1 & 280 sqm D1 & link road between Albert Rd & Southwall Road. We have assumed a gross to net ratio of 70% and it is assumed that all the derived floorspace (259 sqm net) is for convenience goods.
- **Planning Reference 13/00783 – Discovery Park Enterprise Zone, Ramsgate Road, Sandwich -** Outline application for the redevelopment of the site to provide a foodstore (4,830 sqm gross), with associated car parking, petrol filling station (to include associated kiosk and car washing facilities), access and servicing arrangements and landscaping (to include removal of existing surface infrastructure). We understand from the Council that this was proposed for a Sainsbury's store but that they have subsequently pulled out of the scheme, however the permission granted remains extant. Of the proposed floorspace we assume that the net floorspace will be 3,381 sqm net (i.e. 70% of total) of which 70% will be for convenience goods (2,367 sqm net) and 30% for comparison goods (1,014 sqm net).
- **Planning Reference 07/01081 – Aylesham Village Expansion, Aylesham -** application for 191 dwellings of which 20% will be affordable; all associated works and infrastructure, together with new shops and apartments; alterations to existing shops and apartments; landscaping to existing streets and public open spaces including Market Square; the formation of new public open spaces; upgrade of sports

pitch and provision of changing facilities at Ratling Road; formation of squares and a strategic play area; traffic management schemes and new car parking areas; other landscaping works; temporary works and access; construction compounds and off-site highway works. We understand from the Council that the proposed floorspace for A1 uses is 477 sqm gross. The net floorspace tested is 334 sqm net (assuming a gross to net ratio of 70%) and for convenience goods only.

10.21 As detailed in **Appendix 10** the total comparison goods committed floorspace totals 5,865 sqm net that includes:

- **Planning Reference 13/00907** (St. James' Site (DTIZ) **–** As detailed within the convenience goods commitments listing above the derived comparison goods tested is 4,185 sqm net.
- **Planning Reference 10/01011 -** Whitfield Urban Extension: As detailed within the convenience goods commitments above, the assumed derived comparison goods floorspace tested is 279 sqm net.
- **Planning Reference 16/00976:** As detailed within the convenience goods commitments above, the assumed derived comparison goods floorspace tested is 386 sqm net.
- **Planning Reference 13/00783** - As detailed within the convenience goods commitments above, the derived comparison goods tested is 1,014 sqm net.

10.22 The turnover of the above commitments is set out in **Appendix 9** and **Appendix 10** which is discounted from residual expenditure in order to estimate net residual expenditure from which forecast new retail floorspace is identified.

10.23 It should be noted the capacity assessment takes account of all extant commitments and does not account for the other policy led allocations such as those proposed at the Dover Waterfront (Policy CP8) or Dover Mid Town (Policy CP9).

CAPACITY OUTPUTS

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

10.25 The capacity assessment is underpinned by the survey-derived market shares for stores and centres across the Council area.

10.26 It has necessarily been assumed for the purpose of the District-wide capacity assessment that the retail market (convenience and comparison goods) is in 'equilibrium' at the base year. In other words we assume that the existing centres and stores are broadly trading in line with their assumed 'benchmark' turnover levels. Therefore, any residual expenditure available to support new retail floorspace within the study area over the development plan period is derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace[42].

[42] The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note 14 (published in November 2016). However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

10.27 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate ranging from a low of -0.1% (2018), -0.2% (2019), 0% to 2024 and +0.1% (2025 onwards). The corresponding annual productivity growth rates for comparison floorspace are higher; ranging from +0.9% (2018), +1.8% (2019), +2.3% to 2023 to an average of +2.2% (from 2024 onwards). These growth rates have been informed by Experian's latest RPBN15[43] and other research.

10.28 At the outset we advise that all capacity forecasts beyond a five year period should be treated with caution. This is because long term trends in the economy, consumer demand and retail property market could have a significant impact on the potential capacity and need for new retail floorspace. For example, as discussed previously, a higher growth in non-store retail sales (i.e. Internet sales) than forecast by Experian would reduce the capacity for new retail floorspace over time. It should also be noted that this Council-wide strategic capacity assessment is based on a standard constant market share approach. It does not therefore take account of any potential uplift in market shares and capacity that could occur within catchment areas due to the 'claw back' of expenditure to planned new retail developments and investments in more convenient and sustainable town centre locations.

Convenience Retail Capacity Forecasts

10.29 **Appendix 9** sets out and explains the key steps underpinning the convenience goods capacity assessment. The 'baseline' residual expenditure and floorspace capacity forecasts are summarised in the table below:

Table 10.1 Dover District: Convenience Goods Capacity Forecasts (sqm net)

	Foodstore Format (sqm net)				Local supermarket/ Deep Discounter Format (sqm net)			
	2022	2027	2032	2037	2022	2027	2032	2037
Residual Expenditure (after Commitments)	**-£53.4**	**-£46.1**	**-£39.5**	**-£32.9**	**-£53.4**	**-£46.1**	**-£39.5**	**-£32.9**
Dover Town Centre	-825	-809	-794	-780	-1,474	-1,445	-1,418	-1,392
Deal & Sandwich Town Centre(s)	115	272	417	560	205	485	745	1,000
All Other Local & Village Centres	-185	-163	-143	-124	-330	-291	-256	-221
All Out-of-Centre Floorspace	-3,386	-2,990	-2,623	-2,263	-6,047	-5,340	-4,684	-4,040
Total District	**-4,282**	**-3,691**	**-3,143**	**-2,606**	**-7,646**	**-6,591**	**-5,613**	**-4,654**

Notes: Assumes: Equilibrium at 2017
Source: Table 3, Appendix 9

10.30 In order to convert the residual expenditure into a net sales figure we have assumed that new floorspace occupied by the 'top 6' mainstream foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrison's, Waitrose and Marks & Spencer) will achieve an average sales density of circa £12,500 per sqm in 2017.

10.31 As the table shows, after taking into account all known commitments there is no District-wide convenience goods capacity up over the plan period to 2037.

10.32 If the residual expenditure capacity was to be taken up by a local supermarket (e.g. Co-Op, Budgens, etc.) and/or 'deep discount' retailer (e.g. Aldi, Lidl etc.) trading at lower average sales levels of circa £7,000 per sqm in 2017, then there is still no forecast capacity by the end of the study period (up to 2037).

10.33 Hence at a District level there is no forecast convenience goods capacity due to the quantum of known commitments.

10.34 To further help inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) floorspace in the Council area, we have also assessed localised capacity for the main centres as shown in **Table 10.1**. However, it should be noted at the outset that any forecast capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage, transport and physical constraints to

[43] However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives. Furthermore, any potential capacity generated by foodstores in out-of-centre locations should be directed to town centres first in accordance with the NPPF and Local Plan policy. The assessment shows indicative economic capacity of the following quantum:

- **Dover Town Centre** – no identified capacity over the period to 2037. By way of comparison, the 2012 RSU also identified no capacity up to 2031 after taking account of all strategic allocations and accounting for additional associated population and expenditure. Without the allocations the capacity increased to between 2,293 sqm net and 4,587 sqm net. The strategic allocations referred to in the 2012 RSU related to the Dover Waterfront, Dover Mid-Town and Whitfield. However, it should be noted the quantum of new floorspace and turnovers applied were working estimates. Within the current study reference is made to schemes with extant planning permission as detailed above.
- **Deal & Sandwich combined** – between 560 sqm and 1,000 sqm net by 2037. It should be noted that the 2012 RSU identified capacity of between 2,064 and 4,129 sqm net by 2031.
- **Local Centres** – no identified capacity over the period to 2037.
- **Out-of-Centre Floorspace** – no identified capacity over the period to 2037.

10.35 Finally, should the Council consider the potential for new convenience floorspace within new developments then this should be located in town centres, which are the most sustainable and sequentially preferable locations. This is particularly relevant to centres where provision of new convenience provision or enhancement of existing provision could help to attract new shoppers to the centre and support footfall for the city/town centres as a whole through linked trips.

Comparison Goods Retail Capacity

10.36 **Appendix 10** sets out the detailed steps in the comparison goods capacity assessment. The residual expenditure and floorspace capacity forecasts are summarised in the table below. As for convenience goods this approach assumes ‘equilibrium’ at the base year and constant market shares over the forecast period.

10.37 The forecast residual expenditure capacity has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £6,000 per sqm at 2017. This is broadly equivalent to an average sales density for retail units in prime shopping locations in the South East. However, average sales levels inevitably vary between different locations, different retail formats, and different operators. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when plan making and in assessing and in determining applications for different operators and different types of retail floorspace in different locations (such as, for example, ‘bulky goods’ retail warehousing).

10.38 As the table below shows, at a District-wide level there is no capacity for new comparison goods floorspace over the short term (up to 2022) or medium term (up to 2027). By 2032 capacity emerges for 615 sqm net of new comparison goods floorspace and this increases to 3,243 sqm net by 2037.

Table 10.2 Dover District: Comparison Goods Capacity Forecasts (sqm net)

	2022	2027	2032	2037
Dover Town Centre	-3,592	-2,701	-1,715	-688
Deal & Sandwich Town Centre(s)	222	1,029	1,923	2,854
All Other Local & Village Centres	10	46	85	126
All Out-of-Centre Floorspace	-830	-284	321	951
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**-4,190**	**-1,910**	**615**	**3,243**

Source: Table 3, Appendix 10 (Steps 5 & 6)

10.39 As detailed previously, the capacity forecasts assumes 'equilibrium' at the base year and constant market shares over the forecast period. The forecasts show that, after taking in to account all extant commitments, the current 'retention level' of 38.4% yields a floorspace capacity of 3,243 sqm net by 2037. Hypothetically an increase in retention levels due to further new (public/private sector) development and investment may also result in an uplift in forecast floorspace capacity. For example, we forecast that an increase in the current comparison goods retention rate from 38.4% to say 44.5%[44], which is the level achieved in 2012 according to the 2012 RSU, would increase the capacity to 4,521 sqm net (please note that this assumes all the baseline assumptions and forecasts on current population, expenditure and extant commitments etc. remain the same). However, this is a highly theoretical exercise and any increase or decrease in market shares or floorspace capacity will be predicated on a number of influencing factors, including, amongst others, population and expenditure growth in the District, competition from other centres, commitments and the influence of online trading. On this basis it is important that the Council periodically 'refreshes' the surveys and key assumptions/forecasts to assess future floorspace capacity. This will be of particular importance once the St. James scheme has established settled trading conditions, approximately two years after its opening.

10.40 The current assessment also disaggregates identified District-wide capacity for the main centres based on the relative trading performance and market shares of each centre at the base year. The results show:

- **Dover** – there is no forecast capacity, primarily due to the existing commitment at St. James' (DTIZ). In comparison the 2012 RSU identified no capacity up to 2031 after accounting for all strategic allocations (detailed in the convenience capacity section previously), whilst without the allocations the capacity increased to up to 10,643 sqm net.
- **Deal & Sandwich combined** – forecast capacity for 222 sqm net by 2022, rising to 1,029 by 2027 and 1,923 by 2037. The 2012 RSU identified capacity of up to 7,301 sqm net up to 2031.
- **Local Centres** – a marginal 126 sqm net by 2037.
- **Out-of-Centre Floorspace** – identified capacity of 919 sqm net over the period to 2037.

10.41 As with convenience goods the potential for new comparison goods within new developments should be located in town centres, which are the most sustainable and sequentially preferable locations. In relation to future development at Dover Waterfront, the retail and leisure proposed should be complementary to the town centre. We recommend that at the appropriate time the Council should undertake an impact assessment of the proposal on Dover Town Centre.

SUMMARY

10.42 This section has assessed the capacity for new (convenience and comparison goods) retail floorspace across the District's main centres and shopping locations.

10.43 The capacity assessment assumes the (convenience and comparison goods) retail market is in 'equilibrium' at the base year and tests a 'constant market share approach' over the forecast period. This approach is in accordance with good practice for retail assessments.

10.44 For convenience goods there is <u>no</u> forecast District-wide forecast capacity over the plan period to 2037 due to the quantum of existing commitments.

10.45 In relation to comparison goods the District-wide forecast shows no capacity over the short to medium term to 2027. There is capacity for 615 sqm net by 2032, rising to 3,243 sqm net by 2037. Sandwich and Deal account for the majority of this new floorspace by 2032 (1,923 sqm net) and 2037 (2,854 sqm net). There is no capacity

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44 2012 RSU, Pg. 35

for new comparison goods floorspace forecast for Dover, as any residual expenditure growth over the study period will be absorbed by the St. James' scheme[45]. In relation to any future development at Dover Waterfront, the retail and leisure proposed should be complementary to the town centre and at the appropriate time the Council should undertake an impact assessment of the proposal on Dover Town Centre.

10.46 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending etc. In particular, any change in market shares resulting from competition from elsewhere would reduce market share and this could further "dampen" the future demand and capacity for new (physical) floorspace over the long term. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium to long term.

[45] Gross floorspace 7,473 sqm gross, net floorspace 5,231 sqm net (i.e.70% of total) of which 1,046 sqm (20%) for convenience goods and 4,185 sqm (80%) for comparison goods.

11. COMMERCIAL LEISURE NEED / 'GAP' ASSESSMENT

11.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, LPAs should promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres. Against this background leisure uses can make a significant contribution to a town centre's vitality and viability. A good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover in centres, with significant benefits for both daytime and evening economies. However, forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing, as the sector is highly complex and dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and less sophisticated than for retail capacity forecasts.

11.2 The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis focuses on the following key elements:

- a review of the key trends driving market demand in the sector over the last 10-15 years;
- an audit of existing commercial leisure uses in the Council area to help identify any marked 'gaps' in provision;
- a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the study area; and
- a broad economic assessment of the need for new additional leisure facilities across the main centres based on different datasets and accepted approaches.

11.3 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that are widely accepted as making a significant contribution to the overall vitality and viability of town centres; namely food and beverage uses (Class A3-A5), cinemas, health clubs and gyms and to a lesser extent ten-pin bowling, casinos and bingo halls.

11.4 Detailed tables on forecast commercial leisure capacity, including projections on expenditure and need are set out below.

LEISURE EXPENDITURE GROWTH

11.5 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

11.6 **Table 11.1** shows the UK average expenditure per head per annum on commercial leisure services and the average for the Study (Zones 1-10) and Council Area (Zones 1-8) based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across all the zones.

Table 11.1 Estimates of Spending on Leisure Services in 2017 (£ per head)

	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£204	£243	£134	£70	£89	£872	£1,612
Zone 2	£239	£288	£155	£88	£113	£971	£1,855
Zone 3	£454	£322	£130	£134	£188	£1,233	£2,461
Zone 4	£282	£332	£174	£111	£139	£1,139	£2,178
Zone 5	£290	£328	£175	£109	£134	£1,148	£2,185
Zone 6	£402	£335	£153	£122	£168	£1,206	£2,386
Zone 7	£360	£305	£160	£95	£142	£1,082	£2,145
Zone 8	£398	£354	£164	£129	£174	£1,238	£2,457
Zone 9	£412	£312	£119	£125	£174	£1,130	£2,273
Zone 10	£392	£362	£127	£124	£176	£1,231	£2,412
Study Area Average (£)	£343	£318	£149	£111	£150	£1,125	£2,196
(% of Total)	15.6%	14.5%	6.8%	5.1%	6.8%	51.2%	100.0%
Dover DC Area Average (Zones 1-8) (£)	£329	£313	£156	£108	£143	£1,111	£2,160
(% of Total)	15.2%	14.5%	7.2%	5.0%	6.6%	51.4%	100.0%
UK Average (£)	£266	£296	£157	£99	£135	£1,114	£2,068
(% of Total)	12.9%	14.3%	7.6%	4.8%	6.5%	53.9%	100.0%

Source: Experian, 2016 prices.

11.7 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 15 (December 2017). EBS forecasts shows a decreasing growth forecast in the short term (2016-2018) rising to +0.8% in 2019 before stabilising over the longer term (from 2019) to between +1.1% (to 2024) and 1.2% per annum (by 2036). This forecast growth is higher than annual average historic growth rates for the period 1997-2015, when there was no growth in leisure spend.

Table 11.2: UK Leisure Spend Growth: Actual & Forecasts (% per annum)

	2015	2016	2017	2018	2019	2020-2024	2025-2036
Leisure Spend Growth (%)	1.7	0.7	0.3	-0.1	0.8	1.1	1.2

Source: Experian Business Strategies, Retail Planner Briefing Note 15 (December 2017), Figure 1a and 1b

11.8 The base year expenditure per capita levels for leisure (**Table 11.1**) have been projected forward to 2037 using Experian's forecast annual growth rates (**Table 11.2**) and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services (**Table 11.3**). As for the retail assessment, we have assessed total available leisure expenditure based on the Office of National Statistics' (ONS) and Experian's 2016 mid-year estimates projected forwards.

11.9 **Table 11.3** shows that available commercial leisure expenditure across the study area is forecast to increase by 39% (+£113.4m) up to 2037. Growth in commercial leisure expenditure is greatest in Zone 10 with total expenditure forecast to increase by 46.4% over the study period to 2037 followed by Zone 9 (+44.6%). These two zones are outside the Council area. The forecast growth is lowest in Zone 3 and 4 at 34.4% and 34.9% respectively.

Table 11.3 Total Available Commercial Leisure Expenditure (using Experian Population Projections): 2017 – 2037 (£m)

Zone	2017	2022	2027	2032	2037	Change: 2017-2037	Change: 2017-2037
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(%)
Zone 1	39.3	42.1	45.9	50.3	55.1	15.7	40.0%
Zone 2	24.4	26.3	28.6	31.2	34.0	9.6	39.3%
Zone 3	17.7	18.9	20.5	22.2	23.8	6.1	34.4%
Zone 4	34.6	36.7	39.8	43.1	46.7	12.1	34.9%
Zone 5	35.1	37.4	40.8	44.2	47.8	12.7	36.2%
Zone 6	29.9	31.8	34.4	37.5	40.6	10.7	35.7%
Zone 7	26.6	28.6	31.5	34.4	37.6	11.1	41.8%
Zone 8	34.4	37.0	40.4	43.9	47.7	13.3	38.6%
Zone 9	19.2	20.6	22.8	25.3	27.8	8.6	44.6%
Zone 10	29.1	31.4	34.8	38.5	42.5	13.5	46.4%
Study Area (Zones 1-10) (£)	290.3	310.8	339.4	370.6	403.7	113.4	39.0%
Dover DC Area (Zones 1-8) (£)	242.0	258.8	281.8	306.8	333.3	91.3	37.7%

Note: All monetary figures are expressed in 2016 prices.

11.10 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to enhance the scale and quality of Class A3 uses in the District's centres over the development plan period, subject to market demand.

11.11 In the context of the forecast growth in leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the District's main centres and the likely need for new uses and facilities over the forecast period.

CINEMA CAPACITY

11.12 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld (the UK's largest operator, with over a quarter of the cinema box office market), Odeon/UCI; Vue (who operate a multiplex at Westwood Cross, Broadstairs); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC; Vue acquired the Apollo cinema chain; and Cineworld acquired Picturehouse.

11.13 According to research by Dodona (a specialist market research consultancy in the cinema industry) at the end of 2016, the UK had 4,015 screens, 140 more than 2014, in 766 cinemas in the UK. Approximately three-quarters (77%) of the screens are in multiplexes. It should be noted that the number of cinemas has fluctuated, with a low of 697 in 2006 and a high of 769 in 2012. This has been influenced by the increase in the number of multiplex screens and the loss of 'traditional' cinemas. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than six screens) and screens in mixed-use venues (such as arts centres); including The Light, Curzon and Everyman cinemas. Everyman cinema reported in early 2017 that demand for its "home from home" experience is growing around the UK with new opening planned for 2018 venues in York, Liverpool and Newcastle, as well as London's Borough Market in 2020.

11.14 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health and the UK is the second largest consumer market for filmed entertainment in the world after the USA. The latest research shows that box office revenue in 2016 in the UK exceeded £1bn for the fifth year in succession, based on 168.3m admissions. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

11.15 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the 'Screening Room' concept, characterised by leather chairs and table service.

11.16 The most recent change to the industry – the transition to digital cinema technology – was one of the most fundamental shifts in the history of the sector, and has allowed the traditional cinema offer to expand to give audiences even greater choice in what they see. There has also been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry", as they do not require the large shopping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinemas above the store; Genesis, Whitechapel; The Grosvenor, Glasgow; Watershed, Bristol and the Lynton Cinema, Lynton.

11.17 At the other end of spectrum, smaller, boutique cinemas are also performing well. Focused on comfort, often by offering higher quality food, alcohol and larger reclining seats, and holding special screening events, these cinemas typically appeal to demographic that differs to that of the multiplexes. However, a further category of film screening has started to emerge: event cinema. Mirroring trends in retail, people are prepared to pay significantly more for a unique, bespoke film experience – particularly one that lends itself to be shared on social media such as Secret Cinema.

11.18 Turning to the cinema provision in the Dover District Council area, there are two commercial purpose-built cinemas:

- Silver Screen Cinema, Dover (1 screen)
- Empire Cinema, Sandwich (1 screen)

11.19 The current provision will be supplemented by the new Cineworld Cinema (6 screens) as part of the St. James' development (App. Ref: 03/00907) that recently to opened in 2018.

11.20 The HTIS shows that some 53.8% of respondents visited the cinema from across the study area (Zones 1-10), making it the second most popular leisure attraction (after restaurants and cafés). The majority of the respondents who visited a cinema visited once a month (33.8%), with approximately 51.5% visiting once a month or more.

11.21 The survey results also show that cinemas within the District retain a market share of 23.1%; with the Silver Screen Cinema in Dover being the most popular. The other key competing cinemas outside of the Council area are Vue Cinema at Westwood Cross (43.0%) and Cineworld Cinema in Ashford (24.5%). The market retention from within the District (Zones 1-8) increased to 25.9%.

Table 11.4 Cinema Facilities in the Council Area: Market Share

Cinema	% Visits from Study Area	% Visits from Dover DC Area
Silver Screen Cinema, Dover	14.3%	16.5%
Empress Cinema, Sandwich	8.8%	9.4%
Total	23.1%	25.9%

Source: HTIS 2017

11.22 A standard accepted approach to assess the current level of cinema provision and future needs is based on national and regional 'screen density' averages (i.e. number of screens per unit of population).

11.23 According to Dodona, in 2016, the UK average was 6.3 screens per 100,000 people, up from 6.1 screens in 2014. Based on the broad retention rate of 25.9% from the District area (Zones 1-8), **Table 11.5** shows the requirement for additional cinema screens.

Table 11.5 Potential Capacity for New Cinema Screens in the Dover DC Area

	2017	2022	2027	2032	2037
Potential Cinema Catchment Population (Zones 1-8)	29,948	30,786	31,643	32,464	33,256
Cinema Screen Density (screens per 100,000 persons) based on Southern Region	6.3	6.3	6.3	6.3	6.3
Cinema Screen Potential	2	2	2	2	2
Existing: Screen Numbers	2	2	2	2	2
Proposed: Screen Numbers	6	6	6	6	6
Net Screen Potential	-6	-6	-6	-6	-6

Source: Screen density for South East of England derived from British Film Institute Statistical Yearbook 2017
Notes: Screen density is used to measure screen provision in a given area. Existing cinema screens account for key cinema facilities only.
Proposed Scheme potential refers to Cineworld six screen cinema proposed as part of the St. James scheme (App Ref: 03/00907)
The net screen potential is derived by subtracting the existing and proposed provision less cinema screen potential

11.24 The results of our assessment indicate that based on population growth within the study area, there is limited quantitative capacity to support new cinema screens over the study period to 2037, when applying an aspirational UK national average screen density of 6.3 screens per 100,000 people. However, after taking into account the proposed 6 screens Cineworld Cinema as part of the St. James scheme (App Ref: 03/00907) there is no identified capacity within the foreseeable future. Notwithstanding this, the new Cineworld is likely to increase the retention rate currently at 25.9% and claw back visits to competing locations such as Ashford. Furthermore, this may be compounded by additional housing and associated population growth within the District that may increase demand in the future. We would recommend that the Council review this output especially post the development of key projects (such as those at the Dover Waterfront) which may influence participation further.

11.25 In response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, respondents from across the study area stated that they would like a new multi-screen cinema (8.6%) and an art house cinema (0.1%). This indicates a latent demand for this type of facility in the Council area.

11.26 In our judgement, the Council area at present does not command a strong retention level due to the nature of the existing provision. However, this will be redressed by the multiplex at the St. James development. Whilst there is no forecast screen capacity, current trends show that most cinema operators are currently expanding their venue portfolios into regional towns. As a consequence there may be potential demand for new cinema operators to locate in the District especially in the future post the development of key projects. If this is the case, then new cinema provision should be promoted in the main town centres first in compliance with national and local plan objectives to ensure the continued vitality of these centres.

EATING & DRINKING OUT

11.27 The food and beverage sector includes restaurants, cafes, bars and pubs (Class A3-A5), and provides an increasingly important part of a town centre's wider daytime and evening offer and economy. They also complement other town centre uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (i.e. the time people spend in centres) and increase expenditure as part of the same trip.

11.28 As highlighted in **Section 3**, average household expenditure on leisure services in the UK is largely dominated by eating and drinking out. This sector has remained buoyant over time and the year-on-year forecasts for growth by Experian are strong.

11.29 The following provides a summary of some of the key trends driving changes in the food and beverage sector over recent years:

- **Pubs and Wine Bars** - pub operators have widened their food and non-alcoholic beverage offer, resulting in the growth of so-called “gastro-pubs” in competition with more established restaurants, and the rise in ‘micro pubs’. Notwithstanding this the sector has also been characterised by increasing consolidation and closures. Recent research by CAMRA[46] also suggests that on average around 21 pubs closed every week in the UK. The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury’s Local).
- **Restaurants** – this sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include an increase in ‘eating at home’, which has increased sales for takeaways and deliveries. At the same time customers are increasingly basing their decisions to eat out on ‘value for money’, but not at the expense of quality in terms of service, food and the overall experience. Recent successes include Bill’s and Cote, with branded restaurants increasing their share in the market. There has also been a growth in ‘all-you-can-eat’ style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).
- **Cafés/Coffee Shops** – This sector has experienced strong growth over the last five years. According to Mintel research, the UK coffee shop market rose by 37%, up from £2.4 billion in 2011 to reach £3.4 billion in 2016. What is more, between 2015 and 2016 sales increased by 10.4% – the biggest year-on-year boost witnessed in the last five years. The market over the next five years is forecast to grow a further 29%, to reach £4.3 billion[47]. Estimated at 22,845 outlets, the total UK coffee shop market delivered a growth of 6% in outlets in 2016. Costa Coffee, Starbucks Coffee Company, and Caffè Nero remain the UK’s leading chains with a 53% outlet share of the branded coffee shop market. Market leader Costa operates 2,121 UK outlets, adding 129 units in 2016, and Starbucks and Caffè Nero operate 898 and 650 UK outlets respectively. Leading chains continue to expand and enjoy positive like-for-like sales growth, albeit at a slowing pace. However small and medium sized boutique chains such as Coffee#1, Joe & the Juice, and Taylor St. Baristas are gaining momentum and driving the comparable sales growth across the sector, ahead of the leading chains. Increased merger and acquisition activity throughout 2016 signifies the strength of the vibrant coffee shop market in the UK. Activity such as Whitbread’s 49% acquisition of Pure, Tchibo’s acquisition of Matthew Algie, and Caffè Nero’s purchase of Harris+Hoole signals further market convergence.[48] Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade). The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, Allegra[49] reveals that after 18 years of considerable continued growth, the coffee shop market is one of the most successful in the UK economy and is set to outnumber pubs by 2030 as coffee shops become the new local.

11.30 Based on the most recent Council audits, the current provision of Class A3 (restaurants and cafés), A4 (Pubs, bars etc.) and A5 (hot food takeaways) uses, in the primary and secondary shopping frontages of the main centres is as follows:

[46] Campaign for Real Ale (CAMRA) 2018: www.camra.org.uk/pubs

[47] Grande growth: UK coffee shop sales enjoy a growth high – Mintel (12/04/2017)

[48] UK Coffee Leader Summit - Project Café 2017 UK, by Allegra Strategies, ‘Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local’ (20/01/2017)

[49] Allegra, Yet More Growth in UK Coffee Shop Market as Coffee Shops Become the New Local’ (20/01/2017), Ibid

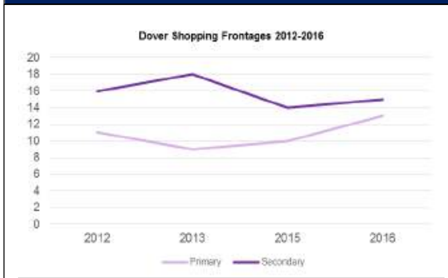
Table 11.6 Current Provision of A3-A5 Units (%)

Centre	Total A3 – A5			
	Primary Shopping Frontage		Secondary Shopping Frontage	
	No. of Units	% of Total	No. of Units	% of Total
Dover	13	7.73%	15	10.13%
Deal	7	6.7%	7	6.25%
Sandwich	n/a	n/a	13	7.83%

Source: Dover DC: Town Centre Audits The above shows a broadly equivalent proportion of A3-A5 units in the primary and secondary frontage areas of Deal and Dover in particular. It is noted that Sandwich has its main provision in its defined secondary frontage area. Since 2012, the data further indicates that there has been a broad convergence in the number of units in the primary and secondary frontage areas of Deal and Dover as shown below.

Figure 11.1: Provision of A3-A5 Units (2012 – 2016)

Provision of A3-A5 Uses		
Dover	Deal	Sandwich



Source: Dover DC: Town Centre Audits The type and quality of A3-A5 provision is described by centre below:

- **Dover –** The town has a low provision of food and beverage operators; although there is a small concentration of hot food takeaways within the centre, particularly along the High Street. The lower provision suggests that encouraging a higher quality of café and restaurant provision alongside the introduction of bars would help to encourage a night time activity across the centre. It is acknowledged that the St. James development with the introduction of new entrants such as Nandos and Bella Italia will contribute to the enhanced offer in the centre. Furthermore, the Council has aspirations for the Dover Waterfront area which in the future also has the potential to become a strong visitor attraction offering restaurants and bars as part of a wider mix of commercial and residential uses.
- **Deal –** Leisure uses are rather spread across the centre; restaurants and pubs are generally located along the seafront on Beach Street, and cafes are located in the centre of the town along the High Street. The majority of leisure providers are independents with varying quality. However there are a number of chain coffee shops such as Costa Coffee and Starbucks in the centre.
- **Sandwich –** The majority of cafes and restaurants are located around the Cattle Market area, as well as along New Street, Market Street and Delf Street. These complement to the retail offer and vibrancy of the town centre.

11.33 The HTIS identified where people living in the study area currently choose to eat and drink, and whether there are potential ‘gaps’ in the current offer. The survey shows that some 61.2% of respondents visited a restaurant or café as a leisure attraction, making it the most popular leisure activity and some 41.2% visited a pub/bar/nightclub. The headline results show that 21.2% of respondents eat out in restaurants and cafes once a week and 7.9% more than once a week. The household survey also shows where respondents choose to eat and drink. The popular choices from within the District were: Betteshanger Park in Deal[50] (16.0%); Deal Town Centre (15.0%); Dover Town Centre (11.4%); and the Secret Garden in Sandwich (4.6%). Other competing centres outside of the Council area were Canterbury City Centre (15.0%), and Folkestone Town Centre (3.4%).

11.34 In terms of pub/bar/nightclub visits, the headline findings show 26.3% of respondents frequent these once a week, and some 14.7% more than once a week. The popular choices for pubs, bars and nightclubs mirror those for restaurants. There were: Betteshanger Park in Deal (19.9%), Deal Town Centre (14.9%), Dover Town Centre (7.1%) and the Secret Garden in Sandwich (6.96%). Other competing centres were Canterbury City Centre (6.5%) and Folkestone Town Centre (1.0%).

11.35 Evidence from other centres in the UK shows that improving a town centre's food and beverage offer can significantly increase the attraction of daytime and evening economies for different customer profiles, as well as generating higher footfall, dwell times and increased expenditure in centres. In summary the qualitative 'gap' analysis shows that in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more; only 0.8% stated that they would like more pavement cafes, 1.8% would like more quality restaurants, 0.3% would like more nightclubs and 0.4% would like more/better public houses. This indicates that there is already a varied and diverse range in the current offer across the Council area.

11.36 Turning to the potential need for F&B uses (floorspace), the total available expenditure for food and drinking in the Council area (Zones 1-8) is £125.3m in 2017. This is set to increase by 37.7% to £172.6m by 2037 as shown in **Table 11.7**.

Table 11.7: Total Leisure Spend in the Dover District Area (Zones 1-8) (£m)

	Dover DC Area (Zones 1-8): Total Leisure Spend (£m)					Change: 2017-2037	Change: 2017-2037
	2017	2022	2027	2032	2037	(£m)	(%)
Accommodation	35.6	38.1	41.5	45.1	49.0	£13.4	37.7%
Cultural services	35.5	38.0	41.3	45.0	48.9	£13.4	37.7%
Games of chance	18.0	19.3	21.0	22.9	24.9	£6.8	37.8%
Hairdressing salons & personal grooming	11.9	12.7	13.8	15.1	16.4	£4.5	37.6%
Recreational & sporting services	15.7	16.8	18.3	19.9	21.6	£5.9	37.6%
Restaurants, cafes, etc.	125.3	134.0	145.9	158.8	172.6	£47.3	37.7%
Total	**242.0**	**258.8**	**281.8**	**306.8**	**333.3**	**£91.3**	**37.7%**

11.37 The household survey has indicated a relatively strong retention in the District of expenditure (70.5%) for eating and drinking out. An appropriate strategy should seek to maintain and increase this market share over the forecast period to 2037.

11.38 On this basis, the available expenditure has been projected forward to 2037 and any residual expenditure available to support new A3-A5 floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers after applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing floorspace at 1% per annum. The analysis also takes account of 1,060 sqm gross of restaurant (A3/A4) proposed as part of the St. James' scheme (App Ref: 03/00907).

11.39 The resulting residual expenditure has been converted into floorspace projections using a 2017 average sales density of £2,015 per sqm net and a higher assumed sales density of £5,000 per sqm net (both inflated by 1%

[50] It is acknowledged that at the time of writing this report there were emerging facilities at the Betteshanger Park and that the responses in the HTIS that pertain to Betteshanger Park are most likely to pertain to existing facilities such as that at the Betteshanger Social and Welfare Sports Club.

per annum over the plan period to 2037). **Table 11.8** summarises the high level capacity forecasts for new Class A3-A5 floorspace on this basis.

Table 11.8: Eating and Drinking Out – Projected Gross Floorspace (sqm)

	2022	2027	2032	2037
Total Available Expenditure in Dover DC Area (£m)	134.0	145.9	158.8	172.6
Current retained turnover (£m)	94.5	102.9	112.0	121.7
Benchmark turnover (£m)	92.9	97.6	102.6	107.8
Net Residual Excluding Commitments (£m)	**1.6**	**5.3**	**9.4**	**13.9**
Turnover of Committed Floorspace (£m)	**3.9**	**4.1**	**4.3**	**4.5**
NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: (£m)	**-2.3**	**1.2**	**5.1**	**9.4**
Capacity (sq m gross) based on a sales density of: £5,000/sqm net	No Capacity	306	1,256	2,191
Capacity (sq m gross) based on a sales density of: £2,015/sqm net	No Capacity	760	3,116	5,438

Notes: Gross to net ratio of 70% applied.
Commitment refers to the 1,060 sqm gross of restaurant (A3/A4) proposed as part of the St. James scheme (App Ref: 03/00907)

11.40 We forecast no capacity over the short term to 2022 after accounting for current commitments. Over the medium term to 2027 we forecast some 306 to 760 sqm gross increasing to between 2,191 sqm gross and 5,438 sqm gross over the long term to 2037. This forecast should be directed to the town centres first to help increase competition and choice, and to help underpin their daytime/evening economies in accordance with national and local policies. New facilities in would help to increase dwell times and attract new town centre users.

11.41 However the need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in town centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there. As the analysis has shown there is already a strong demand and retention from within the catchment and that the current offer is varied and diverse. Qualitative improvements in Dover Town Centre are recommended, however; the St. James development which is to include chain restaurants such as Nando's Benny and Bella Italia will go some way in improving qualitative provision.

HEALTH & FITNESS NEED

11.42 The health and fitness market has generally performed well during the economic downturn. The latest statistics from the Leisure Database Company (LDC)[51] show that over the twelve month period to March 2017, the industry has grown its total market value by 6.3% to £4.7 billion, and its member base by 5.1% to 9.7million. According to the LDC there were an estimated 6,728 fitness facilities in the UK up from 6,435 facilities in 2016, which represented a 4.6% net increase from the previous year. The main operators in the market currently include:

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;

[51] Leisure Database Company : The 2017 State of the UK Fitness Industry Report

- Virgin Active & Nuffield Health (previously Cannons) – dominate the mid-range family-oriented health and fitness market;
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-centre clubs at the more value end of the market; and
- Within London smaller 'boutique' gyms are popular, such as Soho Gyms, which have facilities across the City.

11.43 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("no frills") fitness clubs is growing steadily and lead by Pure Gym with 176 gyms in 2017. Other popular low cost brands include Anytime Fitness, EasyGym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. The low cost business models is based on 24-hour opening, discounted monthly subscriptions (of between £10 and £20 on average) and 'pay as you go' membership. According to LDC, and in 2017, the low cost gym sector accounted for 15% of total private clubs and 35% of private sector membership.

11.44 Overall, the proportion of the population in 2017 with a gym membership in the UK was estimated at 14.9%, up from 14.3% in 2016 and 13.7% in 2015. According to LDC, the average number of members per club in the UK is estimated to be 1,426, which takes into account the average for independent venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members.

11.45 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This can help to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends.

11.46 The table below summarises the current representation of the main national, regional, independent, privately-owned as well as Council-owned leisure centres health and fitness operators across District.

Table 11.9: Leisure Centres, Gyms & Fitness Clubs Across Dover District Area

Type	Name	Private Sector	Public Sector
Leisure Centre	Dover Leisure Centre		√
	Sandwich Leisure Centre		√
	Tides Leisure Centre		√
	Aylesham Welfare Leisure Centre		√
Gym/ Fitness Club	Silverbacks Gym, Dover	√	
	Dover Marina Hotel & Spa, Dover	√	
	Genesis Gym, Dover	√	
	Hourglass Fitness Club, Dover	√	
	Fightin'Fit Boxing & Fitness Club, Dover	√	
	White Cliffs CrossFit, Dover	√	
	The Weights Room, Dover	√	
	Baypoint Leisure, Sandwich	√	
	The Fitness Connection, Sandwich	√	
	Balance Spa & Health Club, St Margaret's	√	
	Studio 30 Fitness, Deal	√	
	The Pilates Shed, Deal	√	
	The Body Works Club, Deal	√	
	Total Fitness Mix, Deal	√	

11.47 The table shows a good representation by independent operators across the Council area. This is supplemented by public sector provision such as the Dover Leisure Centre, Sandwich Leisure, Tides Leisure Centre (Deal).

11.48 In relation to the provisioning of a District-wide leisure centre, it is noted that in September 2017 Dover District Council's Cabinet members gave the go ahead for the construction of a new £26.4m District-wide Leisure Centre. The new scheme will replace the 40-year-old Dover Leisure Centre currently in Townwall Street, Dover town centre. It is understood that the current centre would have cost £13.4m-£15m to refurbish and £1.5m-£2m to maintain over the next five years. Construction of the District-wide Leisure Centre is now well underway on a 2.1ha site in Whitfield with a planned opening early in 2019. The new centre will have 250 parking spaces, compared to 95 at Townwall Street, and two five-aside football pitches, which the existing leisure centre does not have[52].

11.49 In terms of fitness/health activity participation rates, the household survey results show that 15.5% of respondents visited a gym, health club or sports facility from the study area (Zones 1-10) and 15% within the core Council area (Zones 1-8). Of these 68.7% visited more than once a week and 20.9% once a week and 1.2% once a fortnight. Balance Spa & Health Club in St Margaret's is the most popular venue attracting a market share of 15.2% from the study area. This is followed by Dover Leisure Centre (13.7%), Tides Leisure Centre (10.3%), the Weight's Room in Dover (7.4%) and Sandwich Leisure Centre (7.3%).

11.50 In terms of supporting new facilities, there is likely to be demand for new provision across the study area given that the population of the Council area is forecast to increase by 12,772 from 2017 to 2037 (Zones 1-8). Applying the participation rate (15%) for gym and health and health club activities identified for the Council area, this results in some 1,915 potential new gym members over this period. Based on average membership levels of 2,897 members for commercial gym operators and 3,452 members for budget gyms, this quantum of population is not able to support these types of operators over the forecast period to 2037. Additionally, considering the average membership levels for independent venues (726 per club), there is potential to support up to three facilities of this type.

11.51 Notwithstanding this, and as for the wider leisure sector, attracting new health and fitness facilities will be determined by the level of market interest and demand. This is exhibited by the fact that Anytime Fitness signed a 15-year lease in August 2017 on a two-storey unit totalling 536 sqm (5,770 sq ft) on the corner of Dolphin Passage at the St James' scheme (App Ref: 03/00907).

11.52 Finally, in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, 12.9% stated 'a swimming pool', 4.9% suggested 'more local sports & recreation facilities', 2.5% stated 'a sports/leisure centre', and 2.8% suggested improving 'current sports/leisure facilities in the area'. This demonstrates the low demand for this type of facility and a general satisfaction of the offer available in the Council area which is set to be enhanced with the provision of a new District-wide leisure centre at Whitfield.

BINGO & GAMBLING NEEDS

11.53 Gambling represents a significant element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the Council area, if any, based on the available evidence.

11.54 In terms of **Bingo** Halls, the latest research by The Gambling Commission (Industry Statistics November 2015) indicates that there are over 599 licensed premises in operation in the UK, which is a reduction from 653 recorded in 2014. Gala Leisure and Mecca Bingo are the leading operators accounting for over a third (36.9%) of all premises. Research by Mintel indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places),

[52] Other facilities at the new Leisure Centre to include: an 8 lane swimming pool plus a learner pool; spectator seating for 250 people; 4 court sports hall; 120 health & fitness stations; 2 multi-activity studios; a spin studio; 2 squash courts; interactive climbing.

the impact of the economic downturn and the growth of online gaming. In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new ‘app’ development. This forms part of a wider trend and growth in ‘remote/online’ gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. The above has resulted in the closure of many bingo halls across the UK.

11.55 For **Casinos** research shows that there were some 147 in the UK in September 2015. The number of premises has remained fairly static over the past five years. This sector is dominated by two companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casinos) and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group’s purchase of Gala Coral Casinos making it the largest operator in the UK. While casino attendance has grown from 18.24m in 2012 to 20.44m in 2015, attendance dropped by 2.6% from 2014 (20.99m). The increase in attendance since 2012 is largely explained by larger new casino venues granted licences under the 2005 Gambling Act. As far as we are aware there are no major casinos located within the Council area with the nearest major facility being the Genting Casino in Margate.

11.56 **Betting shops** currently represent a growing market in the gambling sector. There are approximately 9,000 betting shops in the UK, of which around half are operated by Ladbrokes and William Hill. Regulatory changes in 2015 led to a fall in revenue and profit. In response, William Hill announced their intention to close 150 of their 2,300 outlets. As gambling activities continue their shift to online channels, demand for physical outlets could dampen in the future. The presence of betting shops in high streets is a contentious issue, particularly the perceived social issues that are linked to this particular activity (e.g. anti-social behaviour); potential for adverse impacts on health and wellbeing and their concentration in deprived areas. The Government has recognised that betting shops have specific impacts and in 2016 reclassified betting shops from A2 to Sui Generis use. This reclassification gave local authorities greater control on managing the number of outlets and therefore greater potential to limit impacts associated with betting shops.

11.57 The HTIS results indicate that 7.2% of respondents living in the study area visit bingo clubs, casinos or bookmakers. Of those respondents who partake, 29.9% visit once every two months, 27.2% visit once every month, and 10.4% visit more than once a week. The most popular named facilities include Gala Bingo in Dover (25.1%) and Regent Bingo & Social Club (1.9%).

11.58 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level. Given that current trends for bingos and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited.

11.59 Finally, in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, only 0.7% of respondents to the household survey stated that they would like a bingo hall with a no response for a casino. These findings further demonstrate the lack of demand for bingo and gambling facilities in the Council area.

GOLF

11.60 Golf and The Open, one of the world’s leading major golfing tournament, is an important contributor to the local economy of Sandwich, the District and Kent as a whole. The open is held at different links courses in the UK. There are eight links courses in total historically eligible to host the event, with a ninth Royal Portrush joining the group in 2019. The courses used are all in Scotland and the north west of England, bar Portrush and the only one in close proximity to London is Sandwich at The Royal St George's Golf Club which is set to host the 149th Open in 2020. It was last played at Royal St George's in 2011.

11.61 In 2011 there were over 180,000 visitors to The Open in Sandwich, and an extra 37,000 passengers travelled on the special High Speed train service from London St Pancras[53]. As an Open Championship venue the club generates a significant amount of revenue for the local economy and the local chamber of commerce has estimated that this is in the region of £70m in an Open Championship year[54].

11.62 In the lead up to this event it provides Sandwich own centre, and the District as a whole, with an opportunity for destination marketing to include the town centre as part of the circuit and thereby capitalise on a local, national and international audience.

OTHER COMMERCIAL LEISURE NEEDS

11.63 Other commercial leisure facilities can be grouped together under 'family entertainment' venues which include paid activities that appeal to adults and children; such as, for example, tenpin bowling, roller skating, ice skating, and similar uses.

11.64 Tenpin bowling is possibly the most popular of this category and has been established as a commercial leisure activity in the UK for over 40 years. It remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK. This sector benefited from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. Bloomsbury Bowl Lanes also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

11.65 There are no ten-pin bowling facilities located in the Council area; the nearest facilities are Bugsys in Margate, MFA Bowl in Whitstable and AMF Bowling in Ashford. The HTIS indicates Bugsys was the most popular venue for this activity (20.5%), followed by AMF Bowling in Ashford (11.5%). The survey further indicates that 16.8% of respondents from the study area partake in family entertainment activities. Compared to other commercial leisure activities, family activities are carried out less frequently with the majority of respondents engaging in family entertainment once every six months (30.8%); 15.1% once every two months, and 13.3% once a month.

11.66 In response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, 9.6% of respondents to the household survey stated that they would like more facilities for children and 7.9% stated ten-pin bowling. As such, in terms of future needs, the District could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

[53] Source: https://www.theopen.com/News/News/2017/02/Royal-St-Georges-Golf-Club-to-host-The-149th-Open-in-2020

[54] Source: https://www.golfenvironment.org/directory/1643_the_royal_st_george_s_golf_club/verifiers-report/647

CULTURAL ACTIVITIES

11.67 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment, consideration is given to the provision of theatres, music venues, and historic/ cultural attractions across the Council area. A list of some popular cultural venues (including theatres, music venues, museums and art galleries) are set out in the table below:

Table 11.10: Cultural Venues in the Council Area

Type	Name
Theatre and Music	The Booking Hall
	Astor Community Theatre
	The Lighthouse
Museum	Deal Castle
	Walmer Castle
	Deal Maritime and local History Muesum
	Dover Castle
	Dover Museum and Bronze Age Boat Gallery
	Dover Transport Museum
	Kent Battle of Britain Museum
	Princess of Wales's Royal Regiment Museum
	Sandwich Guildhall Museum
	St/ Margaret's Museum
	The Womens Land Army Museum
	Timeball Tower Museum
Art Gallery	Linden Hall Studio
	My Gallery

11.68 Cultural venues in the Council area are relatively extensive. The results of the HTIS indicate that 20.9% of respondents from the study area visit museums, galleries and places of historical interest. The HTIS confirms that this form of activity is carried out infrequently, with the majority of respondents visiting places of cultural interest (i.e. museums, galleries, etc.) once every six months (29.6%) or once a year or less (24.2%).

11.69 The most popular location for those visiting cultural venues is the Dover Museum and Bronze Age Boat Gallery, (6.6%) followed by Dover Castle (6.5%) and the Archcliffe Fort (3.5%). Other notable responses were outside the District and include ‘Central London/West End’ (43.8%), ‘Margate – Turner Contemporary’ (6.4%) and ‘Canterbury –The Beaney House of Art & Knowledge’ (5.6%).

11.70 With regard to theatres and music venues, the HTIS shows that 28.8% visit these facilities. In terms of frequency of visits, 40.4% of respondents visit a theatre or music venue once every six months, with 27.8% visiting once every two months. The only theatre/ music venue within the Council area that was mentioned within the HTIS was the Astor Theatre, where 4.4% of respondents visit. The largest outflow was to the Marlow Theatre (Canterbury) 73.1% followed by Central London (13.2%).

11.71 Whilst there are a number of cultural venues within the Council area, the HTIS results show that these are not so popular amongst respondents and as such improvements should be made to draw a greater number of visitors into the area.

HOTEL PROVISION

11.72 Hotel provision across the Council area is largely focused within and around Dover, Deal and Sandwich and is supported by both national and independent operators with the latter having a strong presence.

11.73 There are currently 8 hotels in the Dover area giving a total of 464 letting bedrooms[55]. Within this supply, budget hotels constitute the most significant proportion of the town's hotel stock. There are a number of key projects which may influence hotel provision, and the tourism industry more generally, in Dover. These include:

- **Dover Waterfront –** The site, which includes the beach, the Waterloo Crescent conservation area and the former workshops that form part of De Bradlei Wharf, has been allocated in the Adopted Core Strategy for a mixed use scheme to include a new 400-berth marina, a hotel, 300-800 residential units together with commercial retail and leisure floorspace. Part of the Council's emerging ideas for Dover Waterfront involve creating a landmark cable car link from Dover Castle to Dover Waterfront and a land bridge across the A20.
- **Dover Town Investment Zone –** This involves the current work on the redevelopment of the St. James' area. The development will incorporate a 108-bedroom Travelodge hotel along with some residential units.
- **The Expansion of the Port –** There is expected to be in excess of £300 million investment into the expansion of the Dover Port Western Docks as a result of the Eastern Docks nearing capacity.
- **White Cliffs Business Park -** £100 million is being invested in Dover's flagship business park to develop 65 acres of employment land, to provide 130,000 sqm of commercial space, with the potential to create in excess of 3,000 new jobs.
- **SeaChange –** Development has taken place for a range of projects including the refurbishment of Dover Castle and the Esplanade development.

11.74 Provision in both Deal and Sandwich is dominated by independently owned bed & breakfasts and guesthouses; there are no national operators within these centres.

11.75 In summary, based on our high level assessment and considering the findings of the Dover Hotel Market Fact File (2011), whilst the current hotel provision in the study area is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector. In addition, as has been highlighted in the SWOT analysis for the key centres, a broader strategy for the District is to market and promote the offer and attractions to a wider 'audience' to help attract all-year trips. In this way there may be potential opportunities for growth in this sector. The Council should undertake a periodic assessment of current supply of hotel rooms, occupancy rate and revenue generated (RevPAR) to get an understanding of performance and any potential for growth.

SUMMARY

11.76 The commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.

11.77 Our review of the Council's commercial leisure sector and offer, and the results of the household survey, indicate that there is an adequate level of leisure facilities (for example food and drink) which is soon to be enhanced in terms of the range and quality as part of the new mixed use retail and leisure scheme at St. James in Dover (App Ref: 03/00907). There is clearly potential to strengthen the leisure offer to maximise the benefits resulting from a vibrant night time economy by increasing "dwell times" during the day to the benefit of other shops, businesses and facilities. Additionally the potential development at the Dover Waterfront is likely to

[55] Dover Hotel Market Fact File (March 2011)

increase the commercial leisure provision in the town centre. Broadly, and across all centres, attention should be paid to increasing provision within the main retail area.

11.78 In terms of cinema provision, the assessment found that whilst the retention level for cinemas from across the study area is 23.1%, this is likely to increase with the new Cineworld opening as part of the St. James scheme (App Ref: 03/00907). Future market demand from cinema operators should be directed to town centres in line with national and local plan objectives.

11.79 The total available expenditure for food and drink in the Council area (Zones 1-8) is set to increase by 37.7% (£47.3m) over the period to 2037. There is no identified capacity in the short term after accounting for the A3/A4 floorspace proposed as part of the St. James scheme. The growth in expenditure results in the potential floorspace capacity in the long term of between 2,191 sqm gross and 5,438 sqm gross by 2037. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity they bring to the town centres.

11.80 Given that the population of the Council study/catchment area is forecast to increase by 12,772 compounded further by the popularity of the need for a healthier lifestyle, there may be potential scope for new health and fitness facilities subject to market interest and demand and other planning considerations. Again some of this interest has already been captured by the entry of Anytime Fitness as part of the St. James development.

11.81 Additionally, in terms of addressing future needs, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

11.82 The Council area benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. These need to be maintained and promoted to maintain their current status and attract other further visitors to the area. Whilst the current hotel provision in the District is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector.

11.83 The Council also need to build a marketing campaign around its golfing heritage that will benefit not only Sandwich but the District as a whole.

12. REVIEW OF SHOPPING FRONTAGES AND TOWN CENTRE BOUNDARIES

12.1 This section provides recommendations on the extent of the existing Primary Shopping Frontages (PSFs) and Secondary Shopping Frontages (SSFs) in the District's main centres Dover, Deal and Sandwich. Drawing on the available evidence it also provides guidance on the extent of the Primary Shopping Areas (PSAs). This assessment has been carried out in accordance with the advice and guidance set out in the NPPF.

POLICY CONTEXT

12.2 In setting out policies for the management and growth of centres over the plan period, and promoting competitive town centre environments, local planning authorities are required by the NPPF (paragraph 23) to define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations.

12.3 The NPPF (Annex 2) defines primary and secondary frontages as follows:

- **Primary Shopping Frontages (PSFs)** - likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.
- **Secondary Shopping Frontages (SSFs)** - provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

12.4 The difference between the definition of the Primary Shopping Area (PSA) and Town Centre Boundary (TCB) is defined by NPPF (Annex 2) as follows:

- **Primary Shopping Area (PSA)** – the area where retail development is concentrated and generally comprises the PSFs and those SSFs which are 'adjoining and closely related to the PSF'.
- **Town Centre Boundary (TCB)**[56] – defined as the area on the local authority's proposal map, including the PSA and areas predominantly occupied by main town centre uses within or adjacent to the PSA. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centres uses, do not constitute town centres.

12.5 The definition of a centre's PSA and TCB is important in retail planning terms in respect of the following:

- First, for the purposes of plan making and development management, sites and applications for new retail, leisure and other main town centre uses that are not in an existing centre and not in accordance with an up-to date Local Plan will be subject to the sequential and impact 'tests' in accordance with the NPPF (paragraphs 24-27).
- Second, in terms of applying the sequential approach for both plan making and decision-taking, an 'edge-of-centre' site is defined for retail purposes by the NPPF (Annex 2) as a location that is '*well connected and up to 300 metres of the primary shopping area*'. For all other main town centre uses it is a location '*within 300 metres of a town centre boundary*'; and for office development, it includes '*locations outside the town centre but within 500 metres of a public transport interchange*'. The NPPF states in determining whether a site falls within the definition of edge-of-centre, '*account should be taken of local circumstances'* and preference should be given to '*accessible sites that are well connected to the town centre*' (NPPF, paragraph 24).

[56] References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

- Third, defining the extent of the PSF and PSA for town centres will also enable local planning authorities to manage Permitted Development Rights (PDR), principally from retail to residential use.

12.6 It is against this policy background and guidance that we have necessarily reviewed and identified the extent of each centre's PSF, SSF, PSA and Town Centre Boundary (all where relevant). Our assessment has been based on the evidence from our healthcheck assessments of each centre. In reviewing each centre consideration has been given to the current mix of uses and vacancies within the centre and its constituent parts as well as the current levels of use and any development proposals which may alter the attractiveness of the centre or use of parts of it.

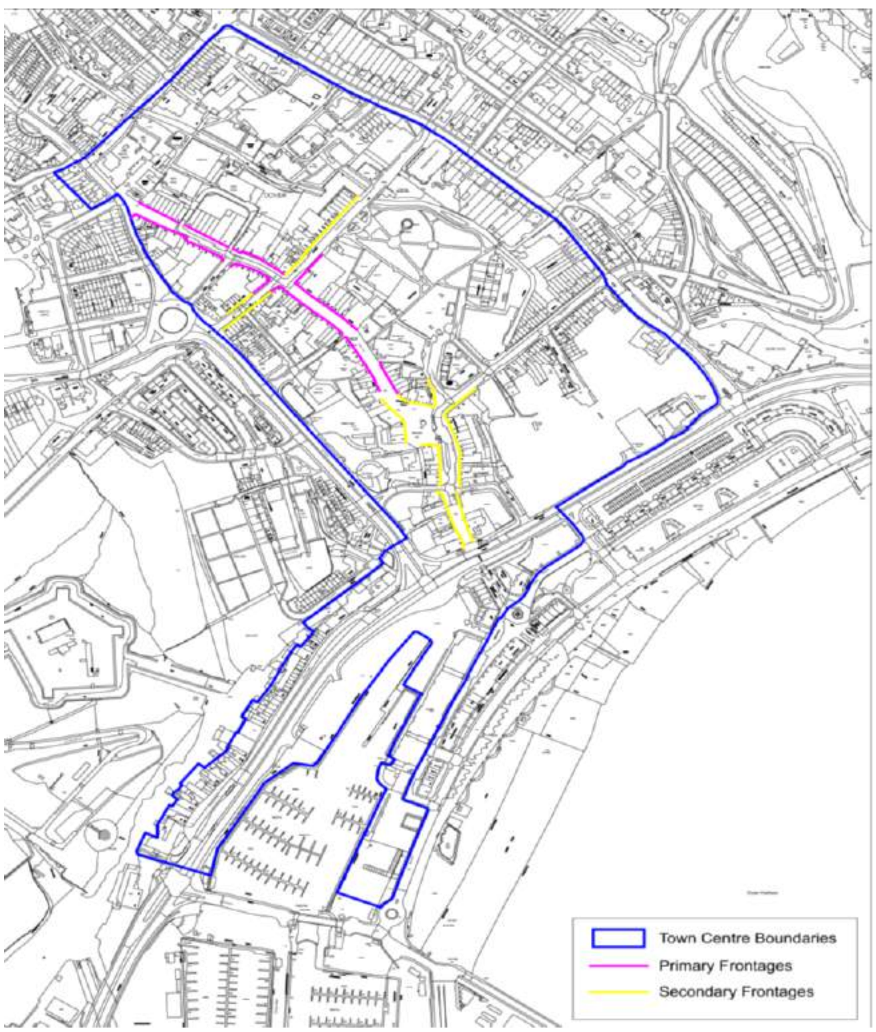
DEFINITIONS OF FRONTAGES AND TOWN CENTRE BOUNDARIES

12.7 Our recommendations are set out below for each of the centres. The assessment should be reviewed alongside the current boundary and frontage plans for each centre as defined under the current DDCS 2010 and the accompanying Proposals Map.

Dover Town Centre

12.8 The extent of the TCB is shown at **Figure 12.1**.

Figure 12.1: Dover Town Centre: Current Town Centre Boundary & Frontages



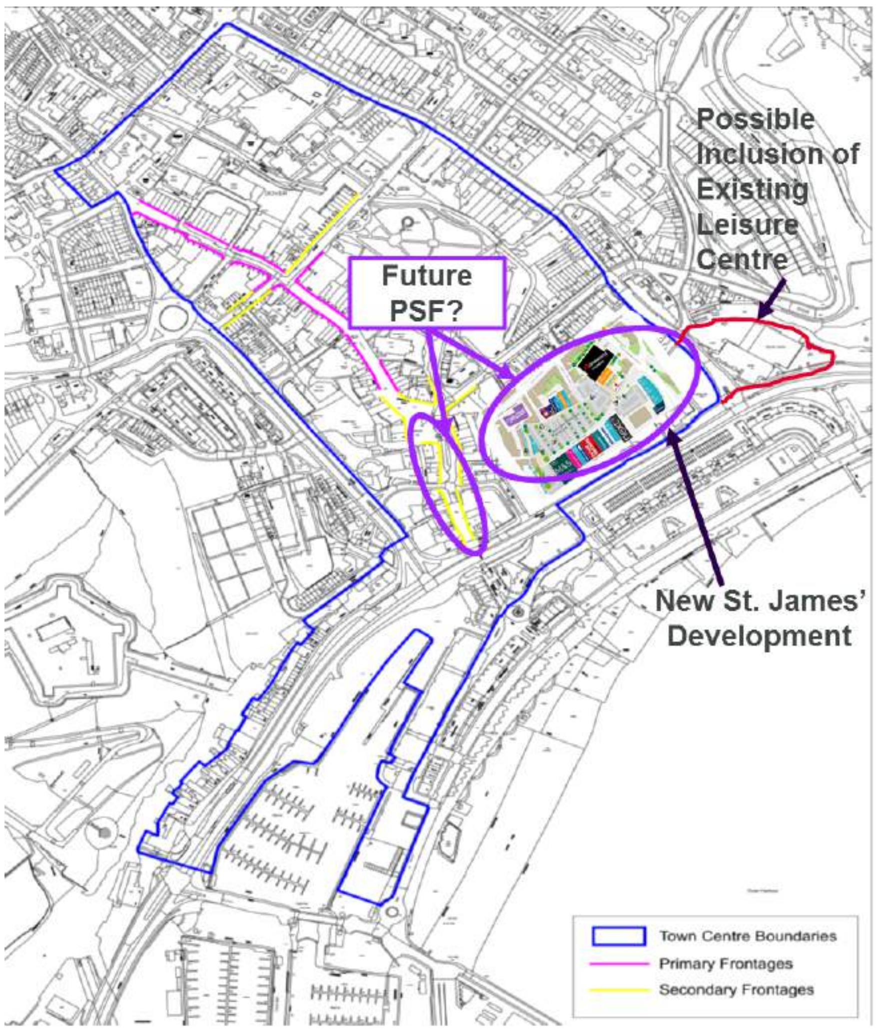
12.9 The extent of the TCB can be described as follows:

Table 12.1: Dover TCB Extent

Town Centre Boundary (TCB)	Shopping Area
Extent	Park Street (in the North) Maison Dieu Road and Woolcomber Street (to the East) Townwall Street, Camden Crescent, Cambridge Road, Esplanade , Snargate Street, Adran Street (to the South) York Street and Priory Road (to the West)

12.10 The TCB is considered to be broadly correct. It is suggested that the TCB should include the area encompassing the existing Dover Leisure Centre which will aid in promoting complementary town centre uses with the adjacent St. James' scheme.

Figure 12.2: Dover Town Centre: Potential Future Town Centre Boundary



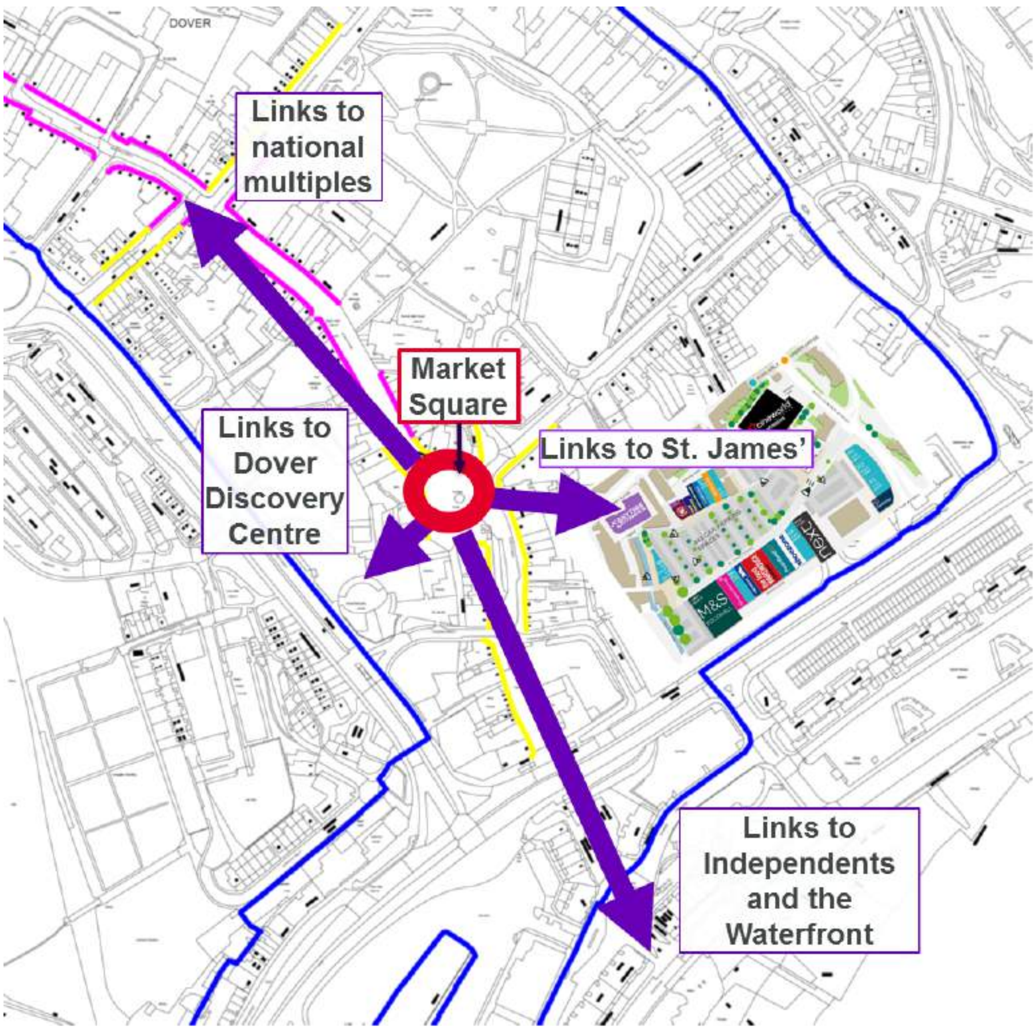
12.11 The extent of the current PSF and SSF for Dover Town Centre is shown in **Figure 12.1** and described further below:

Table 12.2: Dover PSF /SSF

Frontage	Shopping Area	Notes
PSF	Cannon Street to the South West (Nos.1-57) and Pencester Road to the North East (No.29) Biggin Street to the north west (Nos.1-82) and Worthington Street (south west) (No.1)	These locations have a critical mass of retail uses and should be retained
SSF	King Street (nos. 1-20) and Castle Street (Nos.64-68) Church Street (Nos. 1-9) Worthington Street (Nos. 2-25) Pencester Road (Nos.18-82)	

12.12 As stated in the Dover Healthcheck (**Section 6**) the Market Square area represents a key area of focus and potential for the town centre as shown in **Figure 12.3** below:

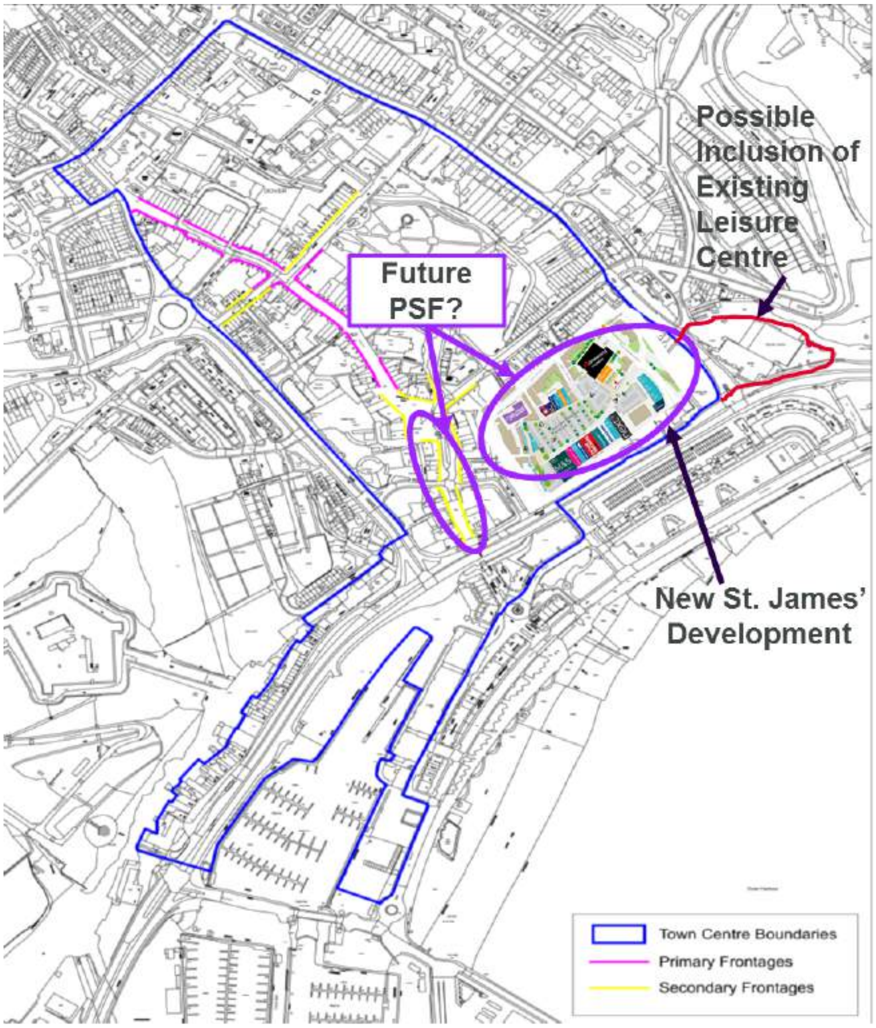
Figure 12.3: Dover Town Centre: Market Square and Developing Linkages



12.13 Based on the above and once the St. James' development is complete the Council should consider according the development with a PSF designation due to its expected critical mass of retail uses. This may also lead to redesignation of the SSF to PSF along King Street subject to a review of accessibility to the St. James' scheme and retail provision on the street at the time.

12.14 In broad terms, the PSA for Dover Town Centre is currently situated around Cannon and Biggin Street. This is likely to shift southwards to include the St. James' development as it will inevitably contribute to the critical mass of retail provision within the centre. It is a further contributing reason for a PSF designation of the scheme. The pattern and take-up of occupancy within the surrounding such as King Street should be monitored by the Council after the scheme has 'settled' (circa 2 years after the scheme opens) to enable a better evaluation of the frontages. This will also represent the opportunity to evaluate progress on the Waterfront development and undertake an assessment of defined town centre uses in the area.

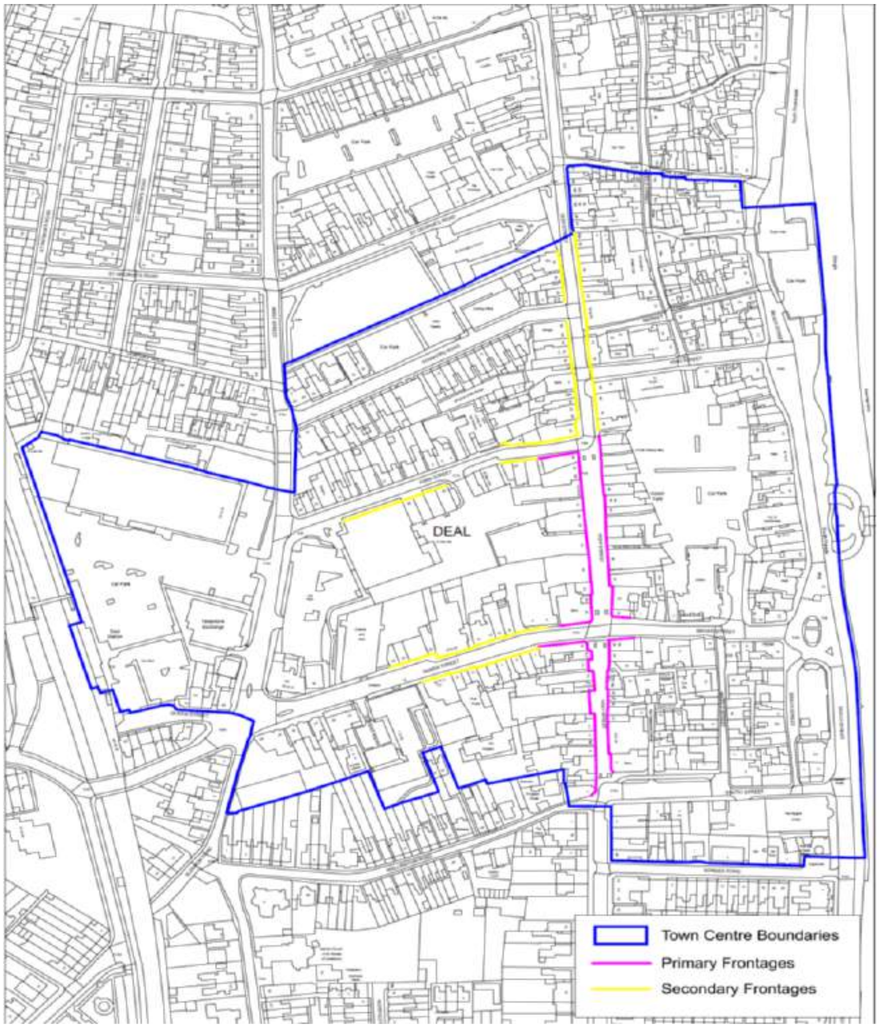
Figure 12.4: Dover Town Centre: Potential Future PSF



Deal Town Centre

12.15 The extent of the Deal TCB is shown at **Figure 12.5**.

Figure 12.5: Deal Town Centre: Current Town Centre Boundary & Frontages



12.16 The extent of the TCB can be described as follows:

Table 12.3: Deal TCB

Town Centre Boundary (TCB)	Shopping Area
Extent	Oak Street (to the North) Beech Street (to the East) Sondes Road & Wellington Road (to the South) West Street (railway line), West Street (entrance to Sainsbury's) (all to the West of the centre)

12.17 The extent of the current PSF and SSF for Deal Town Centre as shown in **Figure 12.5**, is described below:

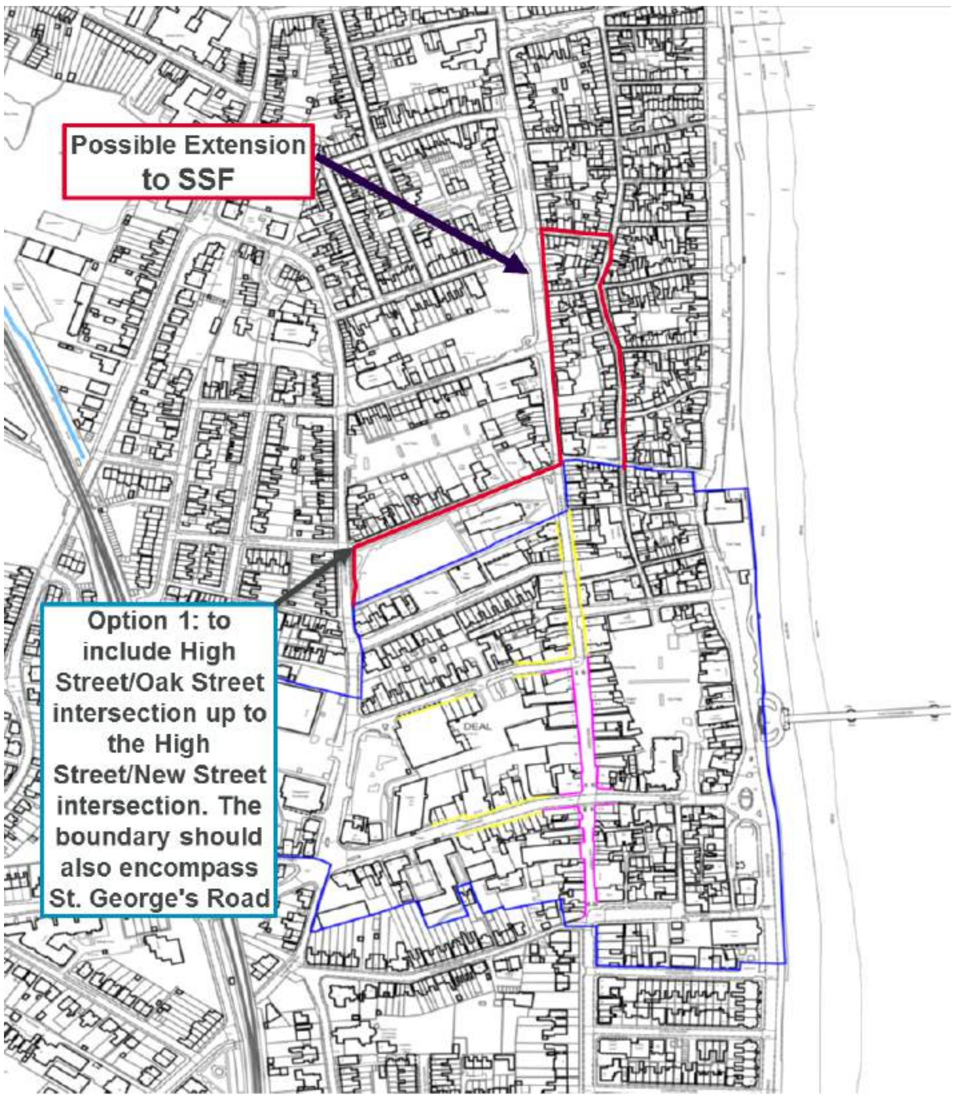
Table 12.4: Deal PSF /SSF

Frontage	Shopping Area	Notes
PSF	High Street (Nos. 1-59) including corner intersection(s) with Broad Street and Queen Street	These locations have a critical mass of retail uses and should be retained
SSF	High Street (Nos. 62-93) and Park Street (Nos. 2-26) Queen Street (Nos. 1-30)	

12.18 We would recommend a number of potential options for extending the current TCB in the north as follows:

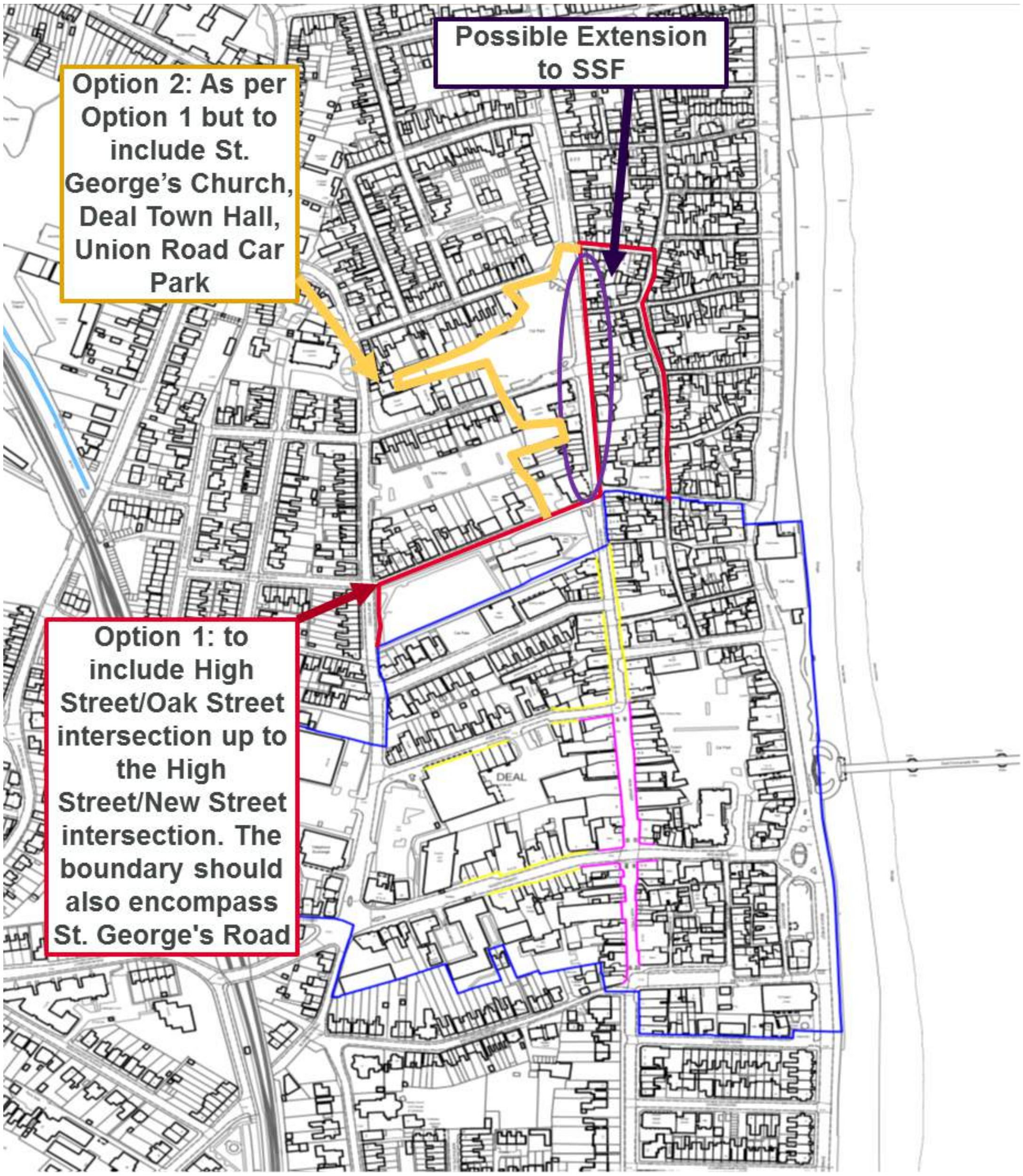
Option 1: to include High Street/Oak Street intersection up to the High Street/New Street intersection. The boundary should also encompass St. George's Road. This additional area overall has a diversity of retail and commercial leisure provision, as well as a Museum, Visitor, St. George's Church and Tourism Centre. These constitute town centre uses under the current NPPF. Furthermore, the Council's own audit has shown that currently 73% of existing units in this area comprise of town centre uses as defined under the NPPF.

Figure 12.6: Deal Town Centre: Suggested Change: Option 1



- Option 2: as above to include Deal Town Hall, The Landmark Centre and Union Road Car Park. This will enable linkage with the retail and commercial leisure provision highlighted in Option 1 together with safeguarding enhancing the vitality of the centre by incorporating the car park which at present also provides space for a long running street market. As with Option 1 these constitute town centre uses under the current NPPF. Furthermore, the Council's own audit has shown that by incorporating this wider area, up to 75% of existing units in this area comprise of town centre uses as defined under the NPPF.

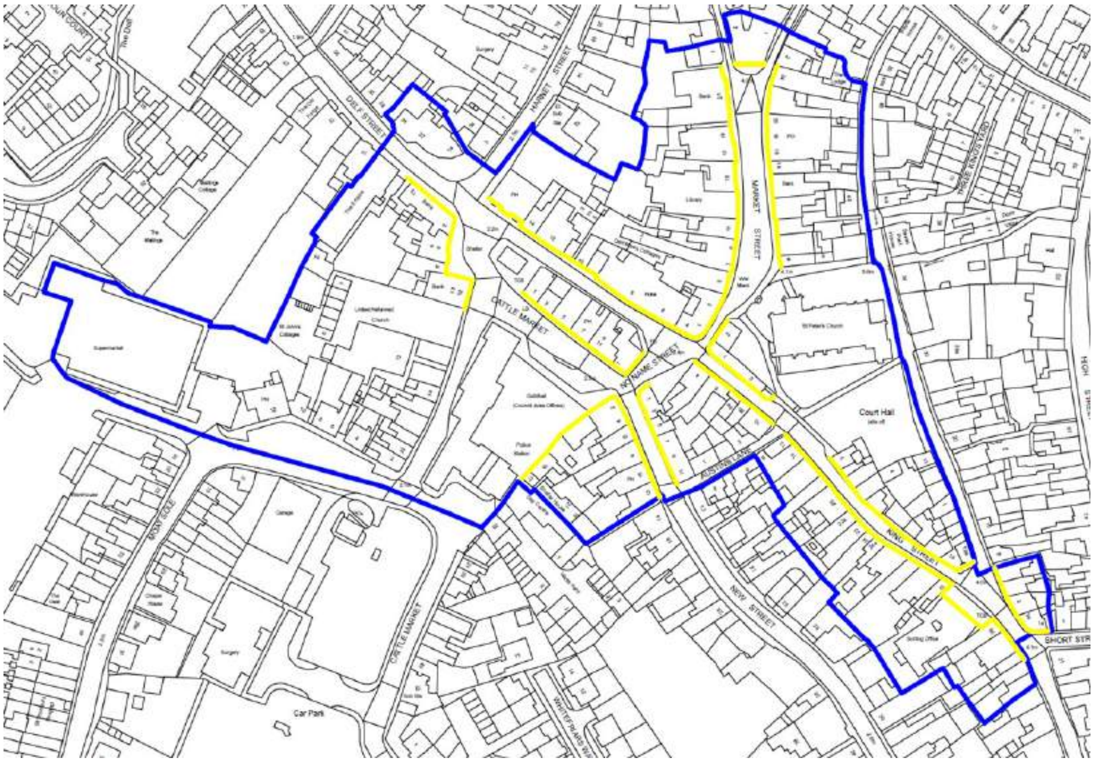
Figure 12.7: Deal Town Centre: Suggested Change: Option 2



Sandwich Town Centre

12.19 The extent of the Sandwich TCB is illustrated in **Figure 12.8**.

Figure 12.8: Sandwich Town Centre: Current Town Centre Boundary & Frontages



12.20 The extent of the TCB can be described as follows:

Table 12.5: Sandwich TCB

Town Centre Boundary (TCB)	Shopping Area
Extent	North: The Butchery (Nos 1-49) and Strand Street (Nos.28 Retain East: St. Peter's Street (Nos. 8-50) ad Short Street (Nos 1, 2A). South: King Street (west) (Nos. 12-38); Austin's Lane (1-6); and Austin's Lane (west - upwards to Sneller Lane). West: Moat Sole Road (Nos. 2-12 & Supermarket), Delf Street (south) and Harnet Street (east)

12.21 Considering the historic pattern of the centre we consider the TCB to be adequate.

12.22 With regard to the frontages designation, and as stated previously, there is currently only a SSF designation as detailed below:

Table 12.6: Sandwich PSF/SSF

Frontage	Shopping Area	Notes
PSF	No PSF	N/A
SSF	Market Street (Nos. 1-24) New Street/Cattle Market (Nos. 1-11) New Street/Delf Street (Nos. 1-13) No Name Street (No. 1) Potter Street (No. 1) The Butchery (No. 2) Delf Street (Nos. 4-14 +PH) New Street (Nos. 1-12) and Guildhall Pedestrianised area King Street (Nos. 1-10, 12-42) Shirt Street (Nos.1-2)	These locations have a diversity of retail and commercial leisure provision and should be retained.

12.23 We consider that the SSF designation as adequate.

12.24 It is also noted that New Street/Cattle Market (Nos. 1-11) up to New Street (No. 6) have a high footfall and visitation due to the proximity with the bus stop and Guildhall. In this way, the Council is encouraged to retain A1 uses in this area. It is also noted that provision of retail is primarily along King Street. Furthermore, we have been advised by the Council that the Guildhall and Market Square, as a focal point of the town, is part of a major regeneration project. At the time of writing this report the Council is working toward a planning application for the Square and a bid to the Coastal Communities fund[57]. The Council should evaluate footfall and provision once this scheme is successfully delivered.

12.25 In addition, it is acknowledged that a masterplan put forward by Rummey Design on behalf of Kent County Council, Dover District Council and Sandwich Town Council on the future Sandwich[58] highlights the potential of the Quayside area. Under this assessment it is envisaged that the Quayside area represents an opportunity area for leisure uses and integration through better linkages and permeability with the rest of the town centre. It is recommended that as this area develops the Council should evaluate the TCB and frontages accordingly.

Frontages Policy

12.26 The Council's current policy on frontages is detailed under Policy DM22 of the DDCS 2010. This provides:

- *Within the ground floor of premises in the Dover and Deal primary shopping frontages planning permission will only be given for A1, A3 and A4 uses.*
- *Within the ground floor of premises in the Dover, Deal and Sandwich secondary shopping frontages planning permission will only be given for A1, A2, A3, A4 and A5 uses.*

12.27 We recommend that upon the appropriate time for review, the Council should evaluate composition and define an appropriate policy based on the realities of the retail dynamics at that time. **Appendix 11** reviews typical policies adopted by other LPAs.

[57] https://www.dover.gov.uk/Community/A-New-Vision-for-Sandwich/Sandwich-Consultation-Boards.PDF
[58] https://consultations.kent.gov.uk/consult.ti/SandwichTownReview/consultationHome)

13. KEY FINDINGS

13.1 This final section summarises the key findings of the Dover *Retail and Town Centre Needs Assessment* (Dover 'RTCNA 2017'). It sets out high level advice on how the local planning authority can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2037.

13.2 Our advice is informed by the updated assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2037. The need assessment draws on a robust and up-to-date evidence base and new primary research, including: (i) a health check of Dover, Deal and Sandwich and the District's smaller neighbourhood and village centres; and (ii) a telephone interview survey of some 1,000 households across the local authority area and a wider defined Study Area to help establish current shopping patterns, leisure preferences and market shares.

13.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out-of-centre locations.

13.4 Based on the District-wide and centre capacity forecasts, the following provides a brief summary of:

- each of the main centres' relative health, role and function;
- the forecast quantitative and qualitative need for new convenience goods and comparison goods retail floorspace;
- a reasonable and robust impact 'threshold' in accordance with the NPPF and PPG that will allow the Council to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre; and
- any recommendations for PSFs, SSFs and TCB for the main centres.

CENTRE OVERVIEW

Dover Town Centre

13.5 The healthcheck has demonstrated that the centre has a rich historic and maritime heritage and it is highly accessible.

13.6 Currently Dover Town Centre has vacancy rate of around 15.2% which is higher than the national average (11.2%). A large proportion of vacant units are located along Biggin Street, which is the main thoroughfare into the town centre. It is understood that several improvements are being explored along the two key route corridors down York Street and Biggin Street/Market Square to the Waterfront to make the area more vibrant and inviting to encourage the take up of empty space.

13.7 The town centre physically is long and sprawling but with a diverse multiple and independent retail offer. Key anchor tenants include Marks and Spencer, Argos, Boots, WH Smith, Burton and New Look. In addition to the multiple offer, there is also a high number of independent retailers. These are mainly located along the High Street. A high proportion of respondents to the HTIS suggested enhancements to the retail offer as a key improvement for the town centre.

13.8 The St. James development includes a 6-screen Cineworld, an M&S Foodhall, Next and Nandos alongside Travelodge. It will strengthen the town's critical mass of retail and leisure uses, and improve its overall attraction and market share in the face of increasing competition from existing centres in neighbouring authority areas, out-of-centre retailing and the growing threat of the internet. As the healthcheck has demonstrated, this development represents a major investment coup in a challenging economic climate. It will be an important catalyst for the wider regeneration and rejuvenation of the centre over the long term providing a visible presence to visitors passing through the A20.

13.9 Improvements to the Market Square creates the potential for focal point for the town centre from which radiates links the traditional part of Biggin Street, to St. James, the Dover Discovery Centre and the Waterfront. This area represents a spatial asset that can be transformed as part of the wider regeneration of the town centre to raise the visibility, footfall and profile further.

13.10 Additionally, the proposed transformation of the Waterfront with complementary retail and leisure uses to the town centre will provide the opportunity to create a destination venue for Dover. Over the medium to long term this will help to retain local and visitor expenditure, thereby increasing the centre's overall market share. Creating a complementary offer between the town centre and Waterfront area will further enhance visitation, footfall and linkages between the two locations, subject to the provision of attractive, convenient and safe pedestrian routes. It also provides the Council with a focus to help reposition and proactively promote the town centre and direct the flow of visitors from Kent and especially the Port area.

13.11 The healthcheck has detailed a range of opportunities that Dover can capitalise upon for a sustainable long term future. The emerging points for the Council to address are:

- **Dover as a destination**: There is a need for better branding, marketing and promotion of the town centre as a destination and to recapture expenditure that is flowing to other centres. The St. James development and the future Waterfront regeneration and associated improvements to the public realm represent important catalysts. The Council should seek to actively promote this through events held in the town centre. In short, the Council needs to be proactive and where required to intervene and take risks to improve the offer across the centre.
- **Strong Leadership**: It is essential that with any promotion of the town centre is proactively actioned and managed. With the scale of transformation anticipated for the town centre it is essential that town centre management is supported. The appointment of a town centre manager could potentially assist in developing partnerships to create a vibrant and distinctive town centre. Partnerships could include the Council, local traders, businesses with a view to enhancing the identity and competitiveness of the town centre.
- **Market Square**: An underutilised spatial asset that can be transformed to represent a key focal point for the town centre. It is essential that appropriate radiating linkages are developed such as with the Dover Discovery Centre and York Street as well as southward to the Waterfront.
- **Multi-Purpose**: Town centres are multi-purpose venues where people shop, live, share time or make use of public services (to name a few). For the centre to work there needs to be a mix of uses that are complementary to its functioning. Empty space represents opportunities for other types of development such as residential, offices, bars and restaurants as well as other leisure uses. Hence moving forward, the Council may need to consider the repurposing and the change of use of vacant retail units within Dover Town Centre. The repurposing of space may in the long term lead to a more compact and vibrant centre. By way of example, in Hastings many underused or redundant buildings have been converted into space for artists and arts organisations thereby rejuvenating and providing distinctive character to formerly declining areas.
- **Business rate initiatives**: Business rates are set nationally, however the Council may want to consider business rate discounts for independents and entrepreneurs to boost take-up of empty units.

Deal Town Centre

13.12 Deal in comparison to Dover is a more compact centre. It is a traditional high street, which runs north to south through the town and forms the centre's heart. The historic pattern of the centre lends itself to a limited scale of development for expansion, but notwithstanding this it is nonetheless well thought of by local residents. Deal also has a good level of accessibility.

13.13 Major retailers in the centre include Marks and Spencer, Boots, WHSmith, New Look, Clarks and Superdrug. Additional multiple retailers include Holland and Barratt, Card Factory, M&Co, Shoe Zone, Savers, and Poundland. The majority of retailers are located along the centre and southern end of the High Street. The centre also thrives from its wide range of independent retailers which contribute significantly to the overall diversity and viability of the town centre's offer.

13.14 Deal has a low vacancy rate of 5.8%, when compared with the national average of 11.2%. The low rate of vacancy is attributable to the compact nature of the town centre and the blend of national and independent retailers that offer a diverse and attractive retail offer to shoppers.

13.15 The strategy for the long term should be to proactively and continuously promote the centre as a family leisure destination and capitalise on its historic heritage.

Sandwich Town Centre

13.16 Sandwich is a renowned for its medieval street pattern and high concentration of listed buildings. The town centre serves the daily needs of its local residents and is a key tourist attraction. The centre benefits from its proximity to a renowned international golf course - The Royal St George's Golf Club which is one of the courses on The Open Championship rotation. Sandwich is also relatively well-connected in terms of road and rail links.

13.17 The retail profile of the centre is dominated by independent traders who contribute to the overall diversity, vitality and viability of the centre visit. In terms of representation by multiples this includes Boots, Costa, and the Co-op. The level of vacancy at 5.4% is considerably below that of the national average of 11.1%. The vacancy level is characteristic of a centre of this type which is constrained by the type and size of space available in a historic setting.

13.18 As the development potential is limited due to the historic layout of the town centre, the continued vitality and viability of the centre is dependent on active promotion of the centre and on capitalising on the tourism spend associated with the centre's historic medieval heritage and golfing heritage.

PRIMARY AND SECONDARY SHOP FRONTAGES: RECOMMENDATIONS

13.19 We have also reviewed and identified the extent of each centre's primary and secondary shopping frontages. In setting out policies for the management and growth of centres over the plan period, and promoting competitive town centre environments, local planning authorities are required by the NPPF (paragraph 23) to define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations.

13.20 Our broad conclusions by centre are detailed below:

- **Dover Town Centre**: Regarding the Town Centre Boundary ('TCB') it is considered to be broadly accurate. It is suggested that the TCB should include the area encompassing the existing Dover Leisure Centre which will aid in promoting complementary town centre uses with the adjacent St. James' scheme. In broad terms, the Primary Shopping Area for Dover town centre is currently situated around Cannon and Biggin Street. In our judgement this is likely to shift southwards to include the St. James' development, as it will inevitably contribute to the critical mass of retail provision within the centre. It is a further contributing reason for a PSF designation of the scheme.

- **Deal Town Centre:** We have put forward two options for extending the current TCB in the north to include High Street/Oak Street intersection up to the High Street/New Street intersection. Should the TCB boundary be extended then the area along the High Street/ Oak Street intersection up to the High Street / New Street intersection should be designated as an SSF. This additional area overall has a diversity of retail and commercial leisure provision that constitute as town centre uses under the current NPPF. The PSA for Deal Town Centre is the agglomeration of retail units along the PSF.
- **Sandwich Town Centre:** We consider both the TCB and SSF designation to be adequate.

RETAIL NEEDS ASSESSMENT

13.21 **Section 10** assessed the overall need for new (convenience and comparison goods) retail floorspace in the District over the plan period to 2037. The retail capacity assessment is informed by CJ's CREAT^e Capacity Model. The retail capacity assessment is underpinned by robust evidence and forecasts; it assumes that the retail market is in 'equilibrium' at the base year (2017) and that market shares remain constant over the study period. The assessment identified the following retail capacity for the District over the short (0-5 years) to 2022, medium (0-10 years) to 2027, and long term (0-20 years) to 2037.

13.22 For convenience goods there is no forecast District-wide forecast capacity over the plan period to 2037 due to the quantum of existing commitments.

13.23 In relation to comparison goods, and as shown below, there is no District-wide capacity for new comparison goods floorspace over the short term (to 2022) and medium term (to 2027). By 2032 there is capacity for 615 sqm net, rising to 3,243 sqm net by 2037.

Table 13.1 Dover District: Comparison Goods Capacity Forecasts (sqm net)

	2022	2027	2032	2037
Dover Town Centre	-3,592	-2,701	-1,715	-688
Deal & Sandwich Town Centre(s)	222	1,029	1,923	2,854
All Other Local & Village Centres	10	46	85	126
All Out-of-Centre Floorspace	-830	-284	321	951
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**-4,190**	**-1,910**	**615**	**3,243**

Source: Table 3, Appendix 10 (Steps 5 & 6)

13.24 When capacity is assessed on a centre-by centre basis the forecasts show no quantitative need for new comparison goods floorspace for Dover (assuming constant market shares) as any residual expenditure growth over the study period will be absorbed by the St. James' scheme. Any floorspace capacity over the longer term is forecast for Sandwich and Deal, with a total combined capacity of 1,923 sqm net by 2032, increasing to 2,854 sqm net by 2037.

13.25 However, it should be noted that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. The Council should also take into account these margins for error when assessing the need for new retail floorspace.

13.26 It is the case that the capacity forecasts are predicated on the current level of market share. In the context of the District this pattern may change over time based on the new St. James development in Dover Town Centre. The critical mass of development in terms of the scale and quality of new retail and leisure uses should have a positive impact on the town centre's market share from within the defined study area. This positive impact on market shares should be further raised by the wider regeneration of Dover Waterfront. As stated previously, the

St. James development is a key catalyst for the regeneration and rejuvenation of Dover Town Centre. In this way, we recommend that the Council undertakes a fresh household survey once the scheme has achieved more 'mature' visitor and trading patterns (circa 2 years after the scheme opens) to enable the re-evaluation of the town's market shares, and any resultant impact on the need for new retail, leisure and wider town centre uses. We would also recommend a further survey pedestrian footfall to establish emerging patterns and linkages.

LEISURE NEEDS/GAP ASSESSMENT

13.27 **Section 11** of the study assesses the need for new commercial leisure uses and the 'gaps' in provision.

13.28 The results of the HTIS indicate that there is currently an adequate level of leisure facilities (for example food and drink). In the case of Dover its leisure offer will be significantly enhanced by the range and quality of new leisure uses provided as part of the St. James development (including a new cinema, cafés and restaurants). The regeneration of the Dover Waterfront will also boost the town's wider commercial leisure provision, subject to the provision of strong, safe and convenient pedestrian routes between the waterfront and town centre. In turn, this new investment and development will help to strengthen the town centre's day time and evening economies, increasing dwell times, footfall and linked trip expenditure to other existing shops and businesses. Within Dover Town Centre it is important to focus on a 'multi-purpose' offer (detailed previously) where people shop, live, work and share space to truly create a blend of uses that stimulate both the daytime and evening economies.

13.29 In terms of cinema provision, the assessment found that whilst the retention level for cinemas from across the study area is 23.1%, this is likely to increase with the opening of the new Cineworld as part of the St. James scheme. Any future market demand from cinema operators should be directed to the District's existing town centres in line with national and local plan objectives and cinema provision outside of these centres should be resisted.

13.30 The total available expenditure for food and drink in the Council area is set to increase by £47.3m (37.7%) over the period to 2037. There is no identified capacity in the short term after accounting for the A3/A4 floorspace proposed as part of the St. James scheme. The growth in expenditure results in the potential floorspace capacity in the long term of between 2,191 sqm gross and 5,438 sqm gross by 2037. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity they bring to the town centres.

13.31 Given that the population of the Council catchment area is forecast to increase by 12,772 persons, there may be potential scope for new health and fitness facilities subject to market interest and demand and other planning considerations. Again some of this interest has already been captured by the entry of Anytime Fitness as part of the St. James development.

13.32 Additionally, in terms of addressing future needs, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

13.33 The Council area benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. These need to be maintained and promoted to maintain their current status and attract other further visitors to the area. Whilst the current hotel provision in the District is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector.

13.34 The Council also needs to build a marketing campaign around its golfing heritage that will benefit not only Sandwich but the District as a whole.

MEETING NEEDS IN THE MAIN CENTRES

13.35 The capacity forecasts show that there is no identified convenience goods in the District over the period to 2037. In contrast, and for comparison goods, capacity is generated by 2032 of some 615 sqm net rising more substantially to 3,243 sqm net by 2037. Sandwich and Deal account for the majority of this new floorspace by 2032 (1,923 sqm net) and 2037 (2,854 sqm net). The identified capacity is over the medium to long term.

13.36 The Council is therefore faced with the challenge of identifying suitable sites in and/or on the edge of Dover, Deal and Sandwich Town Centre(s) to accommodate the identified floorspace capacity in full over the development plan period, in accordance with the NPPF (paragraph 23). The identified capacity should be directed to these town centres first in accordance with the sequential approach.

13.37 It is noted that Council at the time of writing this report has not identified any specific sites. Notwithstanding this, its *Land Allocations Local Plan* (2015) (detailed previously) identifies and allocates specific sites that are suitable for development in order to meet the Core Strategy's requirements. We understand from the Council that these will be evaluated as part of the wider review of the current Core Strategy process.

LOCAL IMPACT THRESHOLDS RECOMMENDATIONS

13.38 It has also been assessed whether there is a requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan. In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:

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

13.39 The quantitative and qualitative research evidence indicates that whilst Dover is presently under strain as a result of a higher level of vacancies, the centres of Deal and Sandwich are performing relatively well. They are all nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping.

13.40 The assessment of retail trends in **Section 3** has highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury’s Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury’s Local, Little Waitrose) with a minimum gross floorspace of circa 372 sqm gross (4,000 sq ft gross). In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience (‘top-up’) stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.

13.41 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and ‘bulky’ goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 465 sqm gross (5,000 sq ft gross). This scale of floorspace provides operators with the necessary minimum 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 465 sqm gross (5,000 sq ft gross) are also unlikely to trade as a purely local facility. In circumstances where these types of stores are proposed on the edge or outside of defined town centres, they could result in a significant adverse impact on the trading performance, and overall vitality and viability of existing centres. In this way, investment of this type should be oriented towards town centres to generate footfall and linked trips/expenditure to the benefit of existing shops, services and facilities.

13.42 It is therefore reasonable for applicants proposing developments for new A1 retail (comparison and convenience goods) floorspace and A3-A5 uses of 350 sqm gross and above to demonstrate that they will not, either on their own or cumulatively with other commitments, result in a "significant adverse impact" on any defined centres within the local authority area; carried out in accordance with the NPPF and PPG.

13.43 This is judged to be a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. This is also relevant in the context of the higher level of vacancies in Dover and more generally the threat posed by increased competition from out-of-centre retailing and the growth of internet shopping. It is advised that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.

13.44 A 350 sqm gross impact threshold is also reasonable in this case based on experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).

13.45 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications.

SUMMARY

13.46 In conclusion, the RTCNA has identified that the majority of the forecast capacity for new retail floorspace occurs towards the end of the plan period (i.e. between 2032 and 2037) and for comparison goods only.

13.47 This forecast capacity/need over the long term should be directed to the main town centres of Dover, Deal and Sandwich first, in accordance with national and local plan policy objectives. The distribution of the forecast need for new retail floorspace should reflect the network and hierarchy of centres, and the relative role and function of these centres.

13.48 The intensification of retail and leisure uses in out-of-centre locations is not advised as this could have a significant adverse impact on the vitality and viability of the District's main centres due to the further loss of businesses, customers, footfall and turnover/trade. Applications for new retail, leisure and town centre uses outside of the District's existing centres should be assessed on their merits, and considered against the key sequential and impact tests set out in the NPPF (paragraphs 24-27), and other material considerations.

13.49 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts. The Council should take into account these margins for error and the dynamics of the retail property sector when assessing the need for new retail floorspace. For this reason it is advised that the capacity forecasts should be subject to regular review and a refresh (normally within a 2-year period) to take account of any key changes in the economic forecasts and retail/leisure trends.

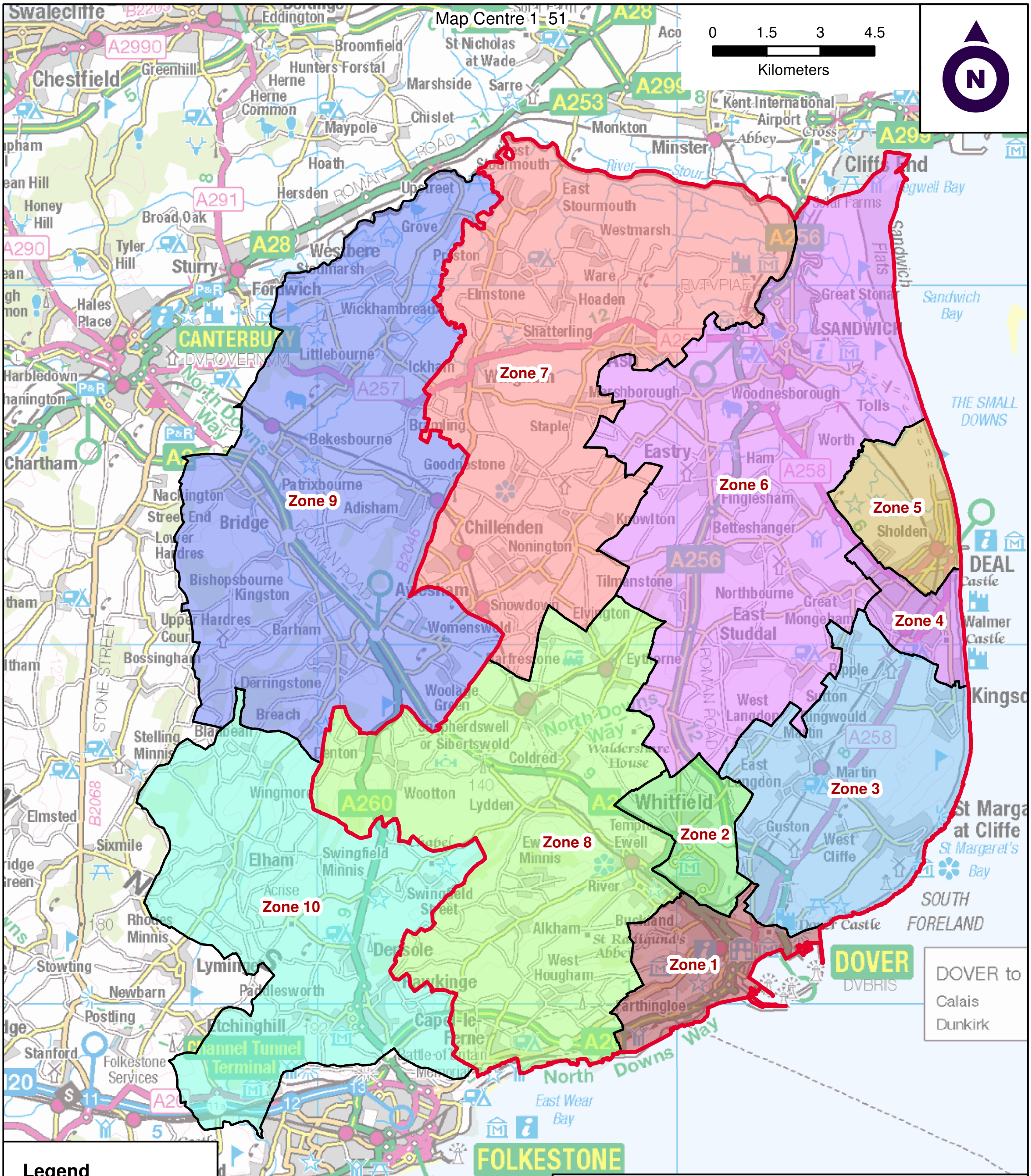
GLOSSARY

TOWN CENTRES:	Town are the principal centre or centres in a local authority's area In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
MAJOR CENTRES	Major centres are typically found in Inner London and often have a borough wide catchment. They generally contain over 50,000sqm of retail, leisure and service floorspace with a higher proportion of comparison over convenience goods; and potentially significant employment, service and civic functions.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. These centres generally contain between 10,000-50,000sqm of retail, leisure and service floorspace; and provide a higher proportion of convenience over comparison goods.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office, a pharmacy or a launderette.
TOWN CENTRE USES:	As defined in the NPPF, main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined in Local Plans and on the policies map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	As defined in the NPPF, For retail purposes a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a town centre. Out-of-centre locations are at the bottom of the retail hierarchy and any application for retail development in an out-of-centre location must fully assess impacts and rule out potential for locating in a more sequentially preferable location.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.

COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

APPENDIX 1: STUDY AREA

Path: C:\MMG3 Output\Dover Retail Study\18-01 Dover Retail Study Catchment.mxd



Legend

- Dover District Council
- Zone 1
- Zone 2
- Zone 3
- Zone 4
- Zone 5
- Zone 6
- Zone 7
- Zone 8
- Zone 9
- Zone 10

Carter Jonas

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Client: **Dover District Council**

Project: **Retail Study**

Title: **Catchment Zones**

Scale: 1:150000@A4 Date: 14 February 2018

Drawn by: AA Dwg no: **18-01**

APPENDIX 2: POPULATION AND EXPENDITURE: CONVENIENCE GOODS

Carter Jonas

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2017) POPULATION & PROJECTIONS (to 2037) — GROWTH 2017 to 2037:

ZONE:	2017	2022	2027	2032	2037	%	2017-37
Zone 1	24,397	25,124	25,819	26,648	27,506	12.7%	3,109
Zone 2	13,169	13,608	13,987	14,377	14,772	12.2%	1,603
Zone 3	7,183	7,372	7,563	7,692	7,774	8.2%	591
Zone 4	15,903	16,196	16,563	16,926	17,275	8.6%	1,372
Zone 5	16,058	16,467	16,926	17,275	17,609	9.7%	1,551
Zone 6	12,539	12,806	13,090	13,431	13,704	9.3%	1,165
Zone 7	12,376	12,806	13,300	13,713	14,129	14.2%	1,753
Zone 8	14,006	14,487	14,926	15,282	15,634	11.6%	1,628
Zone 9	8,456	8,693	9,082	9,500	9,845	16.4%	1,389
Zone 10	12,047	12,515	13,088	13,653	14,199	17.9%	2,152
Study Area	**136,134**	**140,074**	**144,344**	**148,497**	**152,447**	**12.0%**	**16,313**
Dover DC Area (Zones 1-8)	**115,631**	**118,866**	**122,174**	**125,344**	**128,403**	**11.0%**	**12,772**

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2017) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2017 (incl SFT)	2017	2022	2027	2032	2037
		EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		**3.2%**	**4.1%**	**4.7%**	**5.1%**	**5.3%**
REVISED SPECIAL FORMS OF TRADING (%):		**1.7%**	**2.2%**	**2.5%**	**2.7%**	**2.8%**
Zone 1	£1,958	£1,925	£1,906	£1,909	£1,915	£1,922
Zone 2	£2,144	£2,108	£2,087	£2,091	£2,097	£2,105
Zone 3	£2,498	£2,456	£2,432	£2,436	£2,443	£2,453
Zone 4	£2,243	£2,205	£2,184	£2,187	£2,194	£2,202
Zone 5	£2,275	£2,237	£2,215	£2,219	£2,225	£2,234
Zone 6	£2,502	£2,460	£2,436	£2,440	£2,447	£2,457
Zone 7	£2,498	£2,456	£2,432	£2,436	£2,443	£2,453
Zone 8	£2,549	£2,506	£2,481	£2,486	£2,493	£2,503
Zone 9	£2,350	£2,310	£2,288	£2,292	£2,298	£2,307
Zone 10	£2,438	£2,397	£2,373	£2,378	£2,384	£2,394
STUDY AREA AVERAGE:	**£2,346**	**£2,306**	**£2,283**	**£2,287**	**£2,294**	**£2,303**
Dover DC Area (Zones 1-8) Average	**£2,333**	**£2,294**	**£2,272**	**£2,276**	**£2,282**	**£2,291**

Source: Average spend per capita estimates (2015 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2017) TO 2037 (£m) — GROWTH 2017 to 2037:

	2017 (incl SFT)	2017	2022	2027	2032	2037	%	2017-37
Zone 1	£47.8	£47.0	£47.9	£49.3	£51.0	£52.9	12.6%	£5.9
Zone 2	£28.2	£27.8	£28.4	£29.2	£30.1	£31.1	12.0%	£3.3
Zone 3	£17.9	£17.6	£17.9	£18.4	£18.8	£19.1	8.1%	£1.4
Zone 4	£35.7	£35.1	£35.4	£36.2	£37.1	£38.0	8.5%	£3.0
Zone 5	£36.5	£35.9	£36.5	£37.6	£38.4	£39.3	9.5%	£3.4
Zone 6	£31.4	£30.8	£31.2	£31.9	£32.9	£33.7	9.1%	£2.8
Zone 7	£30.9	£30.4	£31.1	£32.4	£33.5	£34.7	14.0%	£4.3
Zone 8	£35.7	£35.1	£35.9	£37.1	£38.1	£39.1	11.5%	£4.0
Zone 9	£19.9	£19.5	£19.9	£20.8	£21.8	£22.7	16.3%	£3.2
Zone 10	£29.4	£28.9	£29.7	£31.1	£32.6	£34.0	17.7%	£5.1
STUDY AREA:	**£313.4**	£308.1	£313.9	£324.1	£334.4	£344.6	11.8%	£36.5
Dover DC Area (Zones 1-8)	£264.1	£259.7	£264.3	£272.2	£280.0	£287.9	10.8%	£28.2

APPENDIX 3: POPULATION AND EXPENDITURE: COMPARISON GOODS

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2017) POPULATION & PROJECTIONS (to 2037) GROWTH 2017 to 2037:

ZONE:	2017	2022	2027	2032	2037	%	2017-37
Zone 1	24,397	25,124	25,819	26,648	27,506	12.7%	3,109
Zone 2	13,169	13,608	13,987	14,377	14,772	12.2%	1,603
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Zone 5	16,058	16,467	16,926	17,275	17,609	9.7%	1,551
Zone 6	12,539	12,806	13,090	13,431	13,704	9.3%	1,165
Zone 7	12,376	12,806	13,300	13,713	14,129	14.2%	1,753
Zone 8	14,006	14,487	14,926	15,282	15,634	11.6%	1,628
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Zone 10	12,047	12,515	13,088	13,653	14,199	17.9%	2,152
Study Area	**136,134**	**140,074**	**144,344**	**148,497**	**152,447**	**12.0%**	**16,313**
Dover DC Area (Zones 1-8)	**115,631**	**118,866**	**122,174**	**125,344**	**128,403**	**11.0%**	**12,772**

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2017) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED COMPARISON EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2017	2017	2022	2027	2032	2037
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING				
EXPERIAN - SPECIAL FORMS OF TRADING (%):		**14.8%**	**17.2%**	**17.6%**	**17.8%**	**18.0%**
REVISED SPECIAL FORMS OF TRADING (%):		**18.4%**	**21.4%**	**21.9%**	**22.1%**	**22.4%**
Zone 1	£2,837	£2,315	£2,526	£2,938	£3,428	£4,000
Zone 2	£3,295	£2,689	£2,934	£3,413	£3,982	£4,646
Zone 3	£4,408	£3,598	£3,925	£4,565	£5,327	£6,216
Zone 4	£3,730	£3,044	£3,321	£3,863	£4,508	£5,260
Zone 5	£3,795	£3,098	£3,379	£3,931	£4,587	£5,352
Zone 6	£4,191	£3,421	£3,732	£4,341	£5,065	£5,910
Zone 7	£3,908	£3,190	£3,480	£4,047	£4,723	£5,511
Zone 8	£4,314	£3,521	£3,841	£4,468	£5,213	£6,083
Zone 9	£4,099	£3,346	£3,650	£4,245	£4,954	£5,780
Zone 10	£4,565	£3,726	£4,064	£4,728	£5,516	£6,437
STUDY AREA AVERAGE:	**£3,914**	**£3,195**	**£3,485**	**£4,054**	**£4,730**	**£5,520**
Dover DC Area (Zones 1-8) Averag	**£3,810**	**£3,109**	**£3,392**	**£3,946**	**£4,604**	**£5,372**

Source: Average spend per capita estimates (2016 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2017) TO 2037 (£m) GROWTH 2017 to 2037:

	2017 (incl SFT)	2017	2022	2027	2032	2037	%	2017-37
Zone 1	£69.2	£56.5	£63.5	£75.9	£91.4	£110.0	94.8%	£53.5
Zone 2	£43.4	£35.4	£39.9	£47.7	£57.3	£68.6	93.8%	£33.2
Zone 3	£31.7	£25.8	£28.9	£34.5	£41.0	£48.3	87.0%	£22.5
Zone 4	£59.3	£48.4	£53.8	£64.0	£76.3	£90.9	87.7%	£42.4
Zone 5	£60.9	£49.7	£55.6	£66.5	£79.2	£94.2	89.5%	£44.5
Zone 6	£52.6	£42.9	£47.8	£56.8	£68.0	£81.0	88.8%	£38.1
Zone 7	£48.4	£39.5	£44.6	£53.8	£64.8	£77.9	97.2%	£38.4
Zone 8	£60.4	£49.3	£55.6	£66.7	£79.7	£95.1	92.9%	£45.8
Zone 9	£34.7	£28.3	£31.7	£38.6	£47.1	£56.9	101.2%	£28.6
Zone 10	£55.0	£44.9	£50.9	£61.9	£75.3	£91.4	103.6%	£46.5
STUDY AREA AVERAGE:	**£515.5**	£420.8	£472.3	£566.4	£680.0	£814.3	93.5%	£393.6
Dover DC Area (Zones 1-8)	£425.9	£347.6	£389.8	£466.0	£557.6	£666.0	91.6%	£318.5

APPENDIX 4: NEMS HOUSEHOLD SURVEY RESULTS

Q01 Where do you NORMALLY shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Cherry Tree Avenue, Dover	12.7%	128	27.4%	51	19.0%	19	6.7%	3	7.4%	9	3.5%	4	13.2%	12	1.5%	1	26.1%	28	0.0%	0	0.7%	1
Aldi, High Street, Hythe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Aldi, Zion Place, Margate	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Boundary Road, Ramsgate	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	4.5%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Westwood Road, Broadstairs	0.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.5%	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Sturry Road, Canterbury	1.9%	19	1.6%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	8.7%	8	0.0%	0	11.5%	7	0.0%	0
Asda Supermarket, Charlton Green, Dover	2.5%	26	7.7%	14	1.7%	2	1.8%	1	0.6%	1	6.1%	7	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda Supercentre, Bouverie Place, Folkestone	1.0%	10	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	5.3%	5
Co-op, The Street, Ash	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Market Square, Aylesham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.7%	0	0.0%	0
Co-op, Beauchamp Avenue, Mill Hill, Deal	0.8%	8	0.0%	0	0.0%	0	0.0%	0	5.5%	6	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Park Street, Deal	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	1	3.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Queens Street, Deal	0.2%	2	0.0%	0	0.0%	0	1.3%	1	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lower Road, River, Dover	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Co-op, High Street, Cheriton, Folkestone	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Moat Sole Road, Sandwich	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	13	4.9%	4	0.7%	1	0.0%	0	0.0%	0
Farm Foods, Charlton Green, Dover	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Queen Street, Deal	1.1%	11	0.0%	0	0.0%	0	0.7%	0	3.1%	4	6.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Dover	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Lidl, Sturry Road, Canterbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.7%	0	0.0%	0
Lidl, Shellons Street, Folkestone	0.5%	5	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.1%	2
Lidl, Haven Drive, Hawkinge	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	11
Lidl, Margate Road, Ramsgate	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer Simply Food, Maybrook Retail	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Park, Sturry Road, Canterbury																						
Marks & Spencer, St Georges Street, Canterbury	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	5	0.0%	0	0.7%	0	0.0%	0
Marks & Spencer, High Street, Deal	0.6%	6	0.0%	0	0.0%	0	0.7%	0	1.2%	1	2.8%	3	0.6%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Biggin Street, Dover	0.1%	1	0.4%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ten Perch Road, Canterbury	4.2%	42	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	1.1%	1	16.5%	15	0.6%	1	40.0%	24	1.2%	1
Morrisons, Bridge Street, Dover	10.5%	105	33.4%	62	15.5%	15	5.3%	3	2.6%	3	3.3%	4	2.1%	2	0.0%	0	15.2%	16	0.0%	0	0.7%	1
Morrisons, Cheriton Road, Folkestone	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.6%	1	0.0%	0	6.4%	6
Sainsbury's Superstore, Simone Weil Avenue, Ashford	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Margate Road, Broadstairs	1.1%	11	0.0%	0	0.0%	0	0.7%	0	1.3%	1	0.0%	0	7.7%	7	1.4%	1	0.0%	0	1.3%	1	0.0%	0
Sainsbury's Superstore, Kingsmead Road, Canterbury	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	1	0.0%	0	11.1%	7	1.3%	1
Sainsbury's Superstore, West Street, Deal	13.1%	131	0.0%	0	0.5%	0	15.4%	8	40.0%	46	56.0%	64	11.4%	11	2.4%	2	0.7%	1	0.0%	0	0.0%	0
Sainsbury's Superstore, Park Farm Road, Folkestone	4.5%	45	3.7%	7	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.2%	1	0.8%	0	38.9%	34
Sainsbury's Superstore, Bouverie Road West, Folkestone	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	5
Tesco Extra, Margate Road, Westwood, Broadstairs Retail Park, Broadstairs	0.7%	7	0.0%	0	0.0%	0	0.7%	0	0.6%	1	1.0%	1	3.1%	3	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	22.3%	223	16.4%	30	53.8%	53	49.7%	25	14.4%	16	4.8%	5	28.7%	27	18.9%	17	43.1%	47	0.7%	0	3.4%	3
Tesco Extra, Millstrood Road, Whitstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Tesco Superstore, Cheriton High Street, Folkestone	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	9
Tesco Superstore, Manston Road, Ramsgate	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, High Street, Broadstairs	0.2%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	2.4%	3	0.7%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco Express, Mace Lane, Ashford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Mill Hill, Deal	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Canterbury Road, Hawkinge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, St. Georges Centre, Canterbury	1.3%	13	0.0%	0	0.0%	0	0.7%	0	2.1%	2	0.0%	0	1.4%	1	2.5%	2	0.0%	0	11.1%	7	0.0%	0
Waitrose, Prospect Road, Hythe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Waitrose, Queen Street, Ramsgate	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Deal - local stores	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - local stores	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich - local stores	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Internet - collection (click and collect)	0.7%	7	1.5%	3	0.0%	0	0.0%	0	0.0%	0	3.1%	4	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Internet - delivered	7.5%	75	4.2%	8	6.9%	7	4.5%	2	18.0%	21	4.1%	5	3.9%	4	9.1%	8	3.6%	4	13.7%	8	9.7%	9
Canterbury - Other	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	6	0.0%	0	4.2%	3	0.0%	0
St. Margaret's - Other	0.3%	3	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q01AWhich retailer do you purchase your main food internet / home delivery shopping from?
Those who do their main food shopping via the Internet at Q01: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	11.4%	9	0.0%	0	0.0%	0	0.0%	0	11.8%	2	0.0%	0	0.0%	0	36.3%	3	0.0%	0	46.9%	4	0.0%	0
Co-op	2.3%	2	0.0%	0	0.0%	0	14.5%	0	0.0%	0	13.5%	1	12.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	1.8%	1	8.7%	1	8.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	6.1%	5	0.0%	0	27.7%	2	0.0%	0	2.9%	1	0.0%	0	22.8%	1	6.8%	1	0.0%	0	13.7%	1	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	14.7%	12	0.0%	0	0.0%	0	14.5%	0	21.1%	4	13.5%	1	0.0%	0	6.8%	1	16.7%	1	19.7%	2	37.8%	3
Tesco	58.7%	48	91.4%	10	36.1%	2	71.0%	2	59.0%	12	73.1%	6	64.9%	2	50.0%	4	58.3%	3	19.7%	2	62.2%	5
Waitrose	5.1%	4	0.0%	0	27.7%	2	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	24.9%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		82		10		7		2		21		8		4		8		5		8		9
Sample:		67		5		5		5		11		7		6		8		5		8		7

Q02 What do you like about (LOCATION MENTIONED AT Q01)? [MR]
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Clean store	0.7%	7	0.0%	0	0.0%	0	0.8%	0	1.3%	1	0.0%	0	0.5%	0	1.9%	2	0.0%	0	1.4%	1	2.7%	2
Close to family / friends	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	4	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Convenient to home	39.3%	361	29.2%	51	48.9%	44	38.1%	18	49.6%	47	44.7%	47	40.0%	36	26.2%	22	45.2%	47	37.8%	20	38.3%	31
Convenient to work	1.5%	14	3.0%	5	0.0%	0	0.0%	0	0.8%	1	0.6%	1	4.5%	4	1.5%	1	0.8%	1	0.0%	0	1.6%	1
Delivery service	1.1%	10	0.0%	0	2.1%	2	2.8%	1	1.2%	1	1.1%	1	0.0%	0	2.6%	2	0.6%	1	0.0%	0	2.6%	2
Easy to get to by car	4.1%	38	4.5%	8	0.5%	0	4.9%	2	6.3%	6	5.5%	6	3.7%	3	4.6%	4	1.4%	1	10.2%	5	2.5%	2
Easy to get to by foot	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.7%	1	0.5%	0	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Easy to get to by public transport	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	0	0.0%	0
Ethical policy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Friendly / helpful staff	3.4%	31	1.6%	3	1.5%	1	1.4%	1	1.8%	2	4.0%	4	3.9%	3	4.0%	3	2.5%	3	7.5%	4	8.9%	7
Good layout / easy to get around	3.1%	28	4.7%	8	0.5%	0	5.5%	3	2.2%	2	1.1%	1	3.0%	3	1.9%	2	0.0%	0	8.0%	4	6.8%	5
Good offers	3.4%	32	10.1%	18	4.9%	4	0.7%	0	0.0%	0	1.3%	1	5.0%	4	2.9%	2	0.0%	0	0.0%	0	1.3%	1
Habit / always used it	7.5%	69	12.4%	22	3.4%	3	4.8%	2	5.4%	5	4.0%	4	3.5%	3	6.2%	5	9.3%	10	7.1%	4	13.5%	11
Has a cafe	0.2%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	1	0.0%	0	0.0%	0
Has a petrol station	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Large store	2.3%	21	1.7%	3	1.5%	1	2.9%	1	0.8%	1	0.0%	0	6.9%	6	1.5%	1	1.1%	1	2.9%	2	5.6%	4
Long opening hours	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	0	0.0%	0
Low prices / value for money	25.3%	233	33.6%	59	30.4%	28	13.8%	7	12.4%	12	23.0%	24	32.7%	29	22.6%	19	31.4%	33	21.2%	11	16.0%	13
Loyalty scheme / reward points	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	5.9%	5	3.1%	3	2.2%	1	0.0%	0
Online shopping is convenient	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Only one in the area	0.4%	4	1.0%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Parking is free	0.9%	9	2.0%	3	0.0%	0	1.3%	1	2.0%	2	0.6%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Parking prices are low	1.3%	12	1.5%	3	2.0%	2	2.1%	1	1.3%	1	0.0%	0	0.0%	0	6.6%	5	0.0%	0	0.0%	0	0.0%	0
Parking provision is good	2.0%	18	0.0%	0	0.0%	0	9.5%	5	2.2%	2	1.1%	1	1.0%	1	2.4%	2	2.5%	3	4.3%	2	3.2%	3
Pleasant shopping environment	0.6%	6	0.0%	0	0.5%	0	6.6%	3	0.6%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.8%	0	0.6%	1
Preference for retailer	1.5%	13	1.5%	3	0.9%	1	0.0%	0	0.6%	1	2.2%	2	0.0%	0	0.7%	1	0.0%	0	2.3%	1	6.6%	5
Quality of food goods available	9.8%	90	10.9%	19	5.4%	5	6.8%	3	13.7%	13	14.3%	15	6.8%	6	6.9%	6	5.2%	5	16.6%	9	11.5%	9
Self-service checkouts	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Quality of non-food goods available	0.8%	7	1.7%	3	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Range of food goods available	22.0%	202	25.7%	45	16.6%	15	27.6%	13	10.4%	10	17.4%	18	23.1%	20	37.0%	30	19.9%	21	20.6%	11	23.7%	19
Range of non-food goods available	1.5%	14	0.9%	2	2.6%	2	1.3%	1	2.0%	2	3.7%	4	0.0%	0	1.3%	1	2.5%	3	0.0%	0	0.0%	0
Safe shopping environment	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Small / quiet store	2.8%	26	1.0%	2	0.0%	0	3.6%	2	7.3%	7	0.6%	1	3.2%	3	2.8%	2	2.5%	3	11.1%	6	1.8%	1
Staff discount / work there	0.8%	7	0.4%	1	0.6%	1	1.4%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0	1.2%	1	2.3%	1	0.8%	1
Supporting local business	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.4%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Good shops / services nearby	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	2.5%	3	0.8%	0	0.0%	0
(Don't know / nothing)	4.4%	40	0.8%	1	8.8%	8	0.8%	0	6.3%	6	5.0%	5	7.1%	6	4.8%	4	5.8%	6	0.8%	0	3.2%	3
Weighted base:		919		174		91		48		94		105		89		82		104		53		80
Sample:		934		95		95		95		89		94		94		92		95		92		93

Q03 How do you normally travel to (LOCATION MENTIONED AT Q01)?
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	73.0%	671	63.7%	111	73.4%	67	77.0%	37	77.0%	72	61.1%	64	79.1%	70	67.8%	56	79.9%	83	85.9%	45	82.3%	66
Car / van (as passenger)	9.2%	84	6.8%	12	6.7%	6	9.6%	5	9.6%	9	7.4%	8	11.0%	10	19.7%	16	10.6%	11	9.6%	5	4.0%	3
Bus, minibus or coach	4.3%	39	3.5%	6	9.9%	9	2.0%	1	3.9%	4	1.7%	2	2.5%	2	3.3%	3	7.4%	8	3.0%	2	4.5%	4
Using park & ride facility	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	10.6%	98	23.4%	41	7.4%	7	5.9%	3	8.2%	8	22.9%	24	5.7%	5	1.9%	2	1.5%	2	0.8%	0	8.6%	7
Taxi	0.7%	6	2.2%	4	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.5%	0	0.0%	0	0.0%	0	0.8%	0	0.6%	1
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.9%	8	0.0%	0	0.5%	0	4.1%	2	0.0%	0	5.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / wheelchair	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Varies)	1.1%	10	0.0%	0	2.1%	2	1.3%	1	0.8%	1	0.0%	0	1.1%	1	6.6%	5	0.6%	1	0.0%	0	0.0%	0
Weighted base:		919		174		91		48		94		105		89		82		104		53		80
Sample:		934		95		95		95		89		94		94		92		95		92		93

Q04 When you visit (LOCATION MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? [MR]
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Yes - non-food shopping	9.4%	87	5.1%	9	4.9%	4	15.5%	7	13.1%	12	9.4%	10	16.1%	14	15.6%	13	2.0%	2	13.6%	7	9.0%	7
Yes - other food shopping	8.3%	76	7.6%	13	9.3%	8	10.8%	5	7.5%	7	16.0%	17	9.6%	9	7.6%	6	0.6%	1	4.2%	2	10.1%	8
Yes - bars / pubs	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - cafés	1.6%	15	0.0%	0	0.5%	0	0.7%	0	2.3%	2	4.0%	4	2.4%	2	1.4%	1	3.0%	3	0.0%	0	1.2%	1
Yes - cinemas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - get petrol	1.3%	12	0.0%	0	0.0%	0	1.9%	1	0.8%	1	0.0%	0	4.9%	4	0.7%	1	1.7%	2	2.3%	1	2.6%	2
Yes - go to park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - gyms / health and fitness	1.2%	11	3.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.4%	1	1.9%	2	0.8%	0	0.0%	0
Yes - library	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - markets	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.6%	1
Yes - meeting family	1.6%	14	0.0%	0	0.0%	0	2.6%	1	1.9%	2	0.6%	1	5.0%	4	6.8%	6	0.0%	0	1.4%	1	0.0%	0
Yes - meeting friends	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - museums / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - other service (e.g. travel agent, estate agent etc.)	0.9%	8	1.7%	3	0.6%	1	1.9%	1	0.0%	0	0.6%	1	0.0%	0	1.3%	1	0.0%	0	2.8%	1	0.6%	1
Yes - personal service (e.g. hairdressers, beauty salon etc.)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.5%	0	1.5%	1	1.1%	1	0.0%	0	2.5%	2
Yes - restaurants	1.2%	11	0.0%	0	4.4%	4	0.7%	0	2.6%	2	1.3%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	2.6%	2
Yes - swimming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Yes - theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting services such as banks and other financial institutions	1.7%	15	0.0%	0	2.1%	2	3.3%	2	3.1%	3	0.6%	1	2.7%	2	4.7%	4	0.0%	0	2.2%	1	1.4%	1
Yes - work	2.6%	24	5.1%	9	1.2%	1	8.4%	4	0.0%	0	0.0%	0	2.5%	2	0.7%	1	2.9%	3	4.6%	2	2.2%	2
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - school run	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Yes - visit health service	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Yes - window shopping / browsing	0.9%	8	1.7%	3	0.0%	0	0.8%	0	2.6%	2	0.0%	0	0.0%	0	1.3%	1	0.6%	1	0.0%	0	0.6%	1
(No)	71.2%	654	78.9%	137	73.3%	67	63.2%	30	68.9%	65	73.2%	77	57.0%	51	54.1%	44	83.3%	86	71.2%	37	73.8%	59
(Don't know)	2.5%	23	1.8%	3	4.4%	4	0.0%	0	1.6%	1	1.1%	1	4.9%	4	5.9%	5	4.0%	4	0.0%	0	0.0%	0
Weighted base:		919		174		91		48		94		105		89		82		104		53		80
Sample:		934		95		95		95		89		94		94		92		95		92		93

Q05 When you combine your trip with other activities, where do you normally go?

Those who combine their main food shopping trip with other activities at Q04: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Broadstairs Town Centre	0.5%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury Town Centre	14.3%	32	3.1%	1	20.3%	4	18.6%	3	0.0%	0	0.0%	0	3.1%	1	44.3%	14	4.8%	1	62.5%	8	3.5%	1
Deal Town Centre	23.9%	54	0.0%	0	2.3%	0	27.6%	5	69.3%	19	88.6%	23	13.3%	4	4.9%	2	4.8%	1	0.0%	0	0.0%	0
Dover Town Centre	27.7%	62	78.4%	23	53.5%	11	27.3%	5	17.5%	5	6.8%	2	24.2%	7	5.3%	2	66.9%	9	0.0%	0	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	8.8%	20	16.0%	5	2.9%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	3.5%	1	13.7%	2	0.0%	0	61.2%	11
Ramsgate Town Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	3.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	4	12.0%	4	0.0%	0	0.0%	0	0.0%	0
Ashford Designer Outlet, Ashford	0.1%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds)	0.6%	1	0.0%	0	0.0%	0	7.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone	2.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.2%	5
Sturry Road Retail Park, Canterbury	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	15.2%	2	0.0%	0
Westwood Cross Shopping Centre, Broadstairs	2.1%	5	0.0%	0	0.0%	0	1.9%	0	5.3%	1	0.0%	0	7.7%	2	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	6.6%	15	0.0%	0	18.1%	4	11.3%	2	0.0%	0	0.0%	0	26.5%	8	3.2%	1	4.8%	1	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	12.5%	2	0.0%	0
Other	2.1%	5	0.0%	0	0.0%	0	0.0%	0	7.9%	2	0.0%	0	0.0%	0	3.2%	1	4.8%	1	0.0%	0	5.2%	1
Aylesham Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Dover Business Park,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Whitfield, Dover																						
Canterbury - Other	1.1%	3	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	9.8%	1	0.0%	0
Nonington Village	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Walmer Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.5%	1	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		225		29		20		17		28		26		29		32		13		12		18
Sample:		261		20		17		34		33		24		30		40		17		25		21

Q06 In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Cherry Tree Avenue, Dover	15.9%	93	32.3%	37	23.5%	13	21.2%	8	13.8%	9	11.8%	8	5.2%	3	2.9%	2	29.0%	14	0.0%	0	0.0%	0
Aldi, Zion Place, Margate	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Boundary Road, Ramsgate	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Sturry Road, Canterbury	2.4%	14	0.0%	0	1.0%	1	1.6%	1	2.7%	2	0.0%	0	1.1%	1	13.5%	8	1.3%	1	5.8%	2	0.0%	0
Asda Supermarket, Charlton Green, Dover	2.7%	16	10.8%	12	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0	0.0%	0
Asda Supercentre, Bouverie Place, Folkestone	1.4%	8	0.0%	0	8.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	4
Co-op, The Street, Ash	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Market Square, Aylesham	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	4	0.0%	0	0.0%	0	0.0%	0
Co-op, Beauchamp Avenue, Mill Hill, Deal	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.9%	1	4.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Park Street, Deal	1.1%	6	0.0%	0	0.0%	0	1.7%	1	1.1%	1	6.3%	4	0.9%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Co-op, Queens Street, Deal	0.2%	1	0.0%	0	0.0%	0	0.9%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Moat Sole Road, Sandwich	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Farm Foods, Charlton Green, Dover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Iceland, Queen Street, Deal	1.8%	10	0.0%	0	0.0%	0	1.7%	1	10.4%	7	2.9%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Dover	0.8%	4	2.1%	2	1.0%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.3%	1	0.0%	0	0.0%	0
Iceland, Sandgate Lane Shopping Centre, West Terrace, Folkestone	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	5
Lidl, Sturry Road, Canterbury	0.8%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	9.7%	3	0.0%	0
Lidl, Shellons Street, Folkestone	1.9%	11	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.9%	8
Lidl, Haven Drive, Hawkinge	1.9%	11	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	16.4%	9
Lidl, Margate Road, Ramsgate	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.9%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer Simply Food, Maybrook Retail Park, Sturry Road, Canterbury	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0
Marks & Spencer, St Georges Street,	0.8%	5	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	2.0%	1	3.9%	2	0.0%	0	3.4%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Canterbury																						
Marks & Spencer, High Street, Deal	2.9%	17	0.0%	0	0.0%	0	5.4%	2	2.9%	2	16.7%	11	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Biggin Street, Dover	1.3%	8	2.7%	3	2.4%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	2	0.0%	0	0.0%	0
Morrisons, Ten Perch Road, Canterbury	2.4%	14	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	4	0.0%	0	18.4%	6	2.1%	1
Morrisons, Bridge Street, Dover	12.7%	74	26.2%	30	32.0%	18	23.8%	9	7.5%	5	1.7%	1	5.2%	3	1.8%	1	16.3%	8	0.0%	0	0.0%	0
Morrisons, Cheriton Road, Folkestone	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	8.7%	5
Sainsbury's Superstore, Simone Weil Avenue, Ashford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Sainsbury's Superstore, Margate Road, Broadstairs	1.0%	6	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0	2.2%	1	2.9%	2	1.3%	1	0.0%	0	0.0%	0
Sainsbury's Superstore, Kingsmead Road, Canterbury	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0	18.7%	6	1.2%	1
Sainsbury's Superstore, West Street, Deal	6.3%	37	0.0%	0	0.0%	0	12.3%	5	23.7%	16	18.8%	12	5.4%	3	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Park Farm Road, Folkestone	1.6%	9	1.4%	2	2.1%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	8.1%	4
Sainsbury's Superstore, Military Road, Hythe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, St. Lawrence Ground, Old Dover Road, Canterbury	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
Spar, Market Street, Sandwich	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hythe Road, Wilesborough, Ashford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Extra, Margate Road, Westwood, Broadstairs Retail Park, Broadstairs	0.6%	4	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.9%	1	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	13.1%	77	13.2%	15	15.0%	8	18.9%	7	19.9%	13	5.9%	4	21.8%	11	8.7%	5	23.7%	11	3.4%	1	0.0%	0
Tesco Extra, Millstrood Road, Whitstable	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Moat Field Meadow, Kingsnorth, Ashford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Superstore, Cheriton High Street, Folkestone	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	15.2%	8
Tesco Superstore, Manston Road, Ramsgate	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2	5.6%	3	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Mill Hill, Deal	0.4%	2	0.0%	0	1.0%	1	0.9%	0	1.6%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Canterbury Road, Hawkinge	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	4
Waitrose, St. Georges Centre, Canterbury	2.3%	13	0.0%	0	0.0%	0	1.9%	1	1.6%	1	1.7%	1	0.9%	0	6.0%	3	1.6%	1	14.7%	5	1.2%	1
Waitrose, Prospect Road, Hythe	0.2%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Waitrose, Queen Street, Ramsgate	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	4	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Deal - local stores	0.7%	4	0.0%	0	0.0%	0	0.0%	0	1.1%	1	5.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - local stores	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - markets	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich - local stores	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Wingham - local stores	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0
Other	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet - collection (click and collect)	0.8%	5	2.6%	3	0.0%	0	1.1%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet - delivered	3.5%	20	0.0%	0	12.2%	7	1.6%	1	0.0%	0	5.7%	4	9.6%	5	0.0%	0	3.7%	2	1.5%	0	3.9%	2
Canterbury Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Canterbury - Other	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	8.4%	5	0.0%	0	6.9%	2	0.9%	1
Deal Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham - Other	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Weighted base:		586		115		55		38		67		66		51		59		48		34		54
Sample:		571		63		49		69		61		59		57		62		40		58		53

Q06AWhich internet / home delivery retailer do you also use for your main food shopping?
Those who do their main food shopping via the Internet at Q06: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	11.7%	3	0.0%	0	27.9%	2	59.9%	1	0.0%	0	0.0%	0	9.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	16.5%	4	100.0%	3	0.0%	0	0.0%	0	0.0%	0	22.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	1	0.0%	0	0.0%	0	35.3%	1	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	25.9%	6	0.0%	0	12.6%	1	0.0%	0	0.0%	0	37.7%	2	0.0%	0	0.0%	0	64.7%	1	99.9%	0	100.0%	2
Tesco	40.9%	10	0.0%	0	59.5%	4	40.1%	0	0.0%	0	27.4%	1	90.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		25		3		7		1		0		5		5		0		2		0		2
Sample:		19		1		3		2		0		6		3		0		2		1		1

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Cherry Tree Avenue, Dover	6.2%	36	13.0%	14	14.7%	9	15.3%	4	5.7%	4	0.0%	0	0.0%	0	0.0%	0	11.8%	6	0.0%	0	0.0%	0
Asda Superstore, Sturry Road, Canterbury	0.8%	5	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	1.5%	1	5.9%	2	0.0%	0
Asda Supermarket, Charlton Green, Dover	2.6%	15	6.7%	7	8.0%	5	14.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Supercentre, Bouverie Place, Folkestone	0.9%	5	0.0%	0	6.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Co-op, The Street, Ash	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	8	0.0%	0	0.0%	0	0.0%	0
Co-op, Market Square, Aylesham	3.5%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.4%	19	0.0%	0	4.6%	2	0.0%	0
Co-op, Beauchamp Avenue, Mill Hill, Deal	3.0%	18	0.0%	0	0.0%	0	3.0%	1	19.3%	13	3.4%	2	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Park Street, Deal	1.1%	6	0.0%	0	0.0%	0	2.7%	1	0.0%	0	6.9%	5	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Queens Street, Deal	0.2%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Co-op, Lower Road, River, Dover	3.0%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.0%	17	0.0%	0	0.0%	0
Co-op, High Street, Cheriton, Folkestone	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Moat Sole Road, Sandwich	5.0%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	45.4%	25	2.0%	1	1.5%	1	4.6%	2	0.0%	0
Co-op, Eythorne Road, Shepherdswell	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3	0.0%	0	0.0%	0
Co-op, Tothill Street, Minster, Thanet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Costcutter, Bewsbury Cross Lane, Whitfield	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farm Foods, Charlton Green, Dover	0.1%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Queen Street, Deal	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Dover	0.3%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Shellons Street, Folkestone	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	6
Lidl, Haven Drive, Hawkinge	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	9
Marks & Spencer Simply Food, Maybrook Retail Park, Sturry Road, Canterbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Marks & Spencer, St Georges Street, Canterbury	0.4%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	2.1%	1	0.0%	0
Marks & Spencer, High	1.5%	9	0.0%	0	0.0%	0	5.3%	1	5.7%	4	3.2%	2	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Street, Deal																						
Marks & Spencer, Biggin Street, Dover	2.9%	17	7.9%	8	4.1%	2	4.6%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	7.9%	4	0.0%	0	0.0%	0
Marks & Spencer, Westwood Cross Centre, Margate Road, Thanet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ten Perch Road, Canterbury	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	6	1.1%	1
Morrisons, Bridge Street, Dover	11.8%	69	49.1%	52	17.5%	11	3.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	8.1%	4	2.1%	1	0.0%	0
Sainsbury's Superstore, Kingsmead Road, Canterbury	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	2.5%	1	0.0%	0
Sainsbury's Superstore, West Street, Deal	7.2%	42	0.0%	0	0.9%	1	6.4%	2	23.2%	16	26.5%	19	9.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Park Farm Road, Folkestone	2.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	19.6%	11
Sainsbury's Superstore, Bouverie Road West, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Spar, Blackbull Road, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	8.6%	50	12.2%	13	22.9%	14	19.7%	5	3.8%	3	0.0%	0	9.5%	5	10.8%	6	9.0%	5	0.0%	0	0.0%	0
Tesco Superstore, Cheriton High Street, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco Superstore, Manston Road, Ramsgate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	9.7%	3	0.0%	0
Tesco Express, Mill Hill, Deal	5.3%	31	6.1%	6	0.9%	1	3.0%	1	26.8%	18	3.1%	2	4.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Castle House, Bouverie Road West, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco Express, Canterbury Road, Hawkinge	3.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.3%	18
Waitrose, St. Georges Centre, Canterbury	1.0%	6	0.9%	1	0.0%	0	0.0%	0	1.6%	1	1.0%	1	0.0%	0	0.0%	0	1.3%	1	7.3%	3	0.0%	0
Waitrose, Prospect Road, Hythe	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Waitrose, Queen Street, Ramsgate	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash - local stores	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.4%	8	0.0%	0	0.0%	0	0.0%	0
Deal - local stores	6.4%	37	0.0%	0	0.8%	0	4.6%	1	10.2%	7	37.3%	26	0.8%	0	1.0%	1	2.3%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Deal - markets	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - local stores	1.5%	9	0.9%	1	3.2%	2	2.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	9.0%	5	0.0%	0	0.0%	0
Eastry - local stores	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich - local stores	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	7.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich - markets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham - local stores	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	5	0.0%	0	7.7%	3	0.0%	0
Other	0.8%	4	0.9%	1	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	3
Internet - delivered	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Aylesham	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0	0.0%	0
Canterbury - Other	2.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	31.8%	11	0.9%	1
Deal - Other	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Other	0.2%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elham	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	5.5%	3
Folkestone - Other	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Kingsdown	0.1%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
St. Margaret's - Other	0.3%	2	0.0%	0	0.0%	0	6.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walmer Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walmer - Other	0.1%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	1.4%	8	0.0%	0	13.1%	8	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield - Other	0.4%	2	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham - Other	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.2%	1	0.0%	0
Weighted base:		582		105		60		24		68		71		54		57		51		36		56
Sample:		556		52		61		46		62		61		57		64		48		49		56

Q07AWhich retailer do you purchase your top-up food internet / home delivery shopping from?
Those who do their top-up food shopping via the Internet at Q07: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		0		0		0		0		0		0		0		0		0		0		0
Sample:		0		0		0		0		0		0		0		0		0		0		0

Q08 In addition to (LOCATION MENTIONED AT Q07), is there anywhere else you regularly use for your household's small scale top-up food shopping?
Those who do top-up food shopping at Q07 AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Cherry Tree Avenue, Dover	8.8%	20	15.7%	6	1.9%	0	14.3%	2	25.3%	8	0.0%	0	0.0%	0	0.0%	0	21.2%	4	0.0%	0	0.0%	0
Asda Superstore, Sturry Road, Canterbury	3.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.7%	6	4.4%	1	8.6%	1	0.0%	0
Asda Supermarket, Charlton Green, Dover	5.9%	14	18.1%	7	18.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	1	4.3%	1	0.0%	0
Co-op, Market Square, Aylesham	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	3	0.0%	0	4.3%	1	0.0%	0
Co-op, Beauchamp Avenue, Mill Hill, Deal	8.1%	19	16.3%	6	0.0%	0	0.0%	0	16.6%	5	9.6%	2	22.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Park Street, Deal	3.0%	7	0.0%	0	0.0%	0	3.3%	0	0.0%	0	26.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lower Road, River, Dover	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.1%	3	0.0%	0	0.0%	0
Co-op, Moat Sole Road, Sandwich	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	1	4.6%	1	0.0%	0	0.0%	0	0.0%	0
Farm Foods, Charlton Green, Dover	0.6%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Maynard Road, Wincheap Indstrial Estate, Canterbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Queen Street, Deal	1.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	2	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Dover	1.5%	3	1.9%	1	0.0%	0	2.7%	0	7.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Sturry Road, Canterbury	1.7%	4	0.0%	0	16.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Margate Road, Ramsgate	0.1%	0	0.0%	0	0.0%	0	2.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, St Georges Street, Canterbury	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1
Marks & Spencer, High Street, Deal	2.4%	6	0.0%	0	0.0%	0	10.4%	1	6.4%	2	6.7%	2	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0
Marks & Spencer, Biggin Street, Dover	2.8%	7	4.2%	2	11.4%	3	2.7%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	7.2%	1	0.0%	0	0.0%	0
Morrisons, Ten Perch Road, Canterbury	1.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	1	19.5%	3	0.0%	0
Morrisons, Bridge Street, Dover	9.6%	22	25.2%	10	17.2%	4	20.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.1%	3	0.0%	0	13.4%	2
Sainsbury's Superstore, Margate Road, Broadstairs	0.2%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Kingsmead Road, Canterbury	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, West Street, Deal	5.2%	12	0.0%	0	0.0%	0	2.7%	0	16.1%	5	2.4%	1	29.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's Superstore, Park Farm Road, Folkestone	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	10.7%	2
Sainsbury's Local, St. Lawrence Ground, Old Dover Road, Canterbury	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.2%	3	0.0%	0
Spar, Market Street, Sandwich	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	5.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	4.3%	10	9.9%	4	4.6%	1	2.7%	0	5.2%	2	2.4%	1	2.2%	0	0.0%	0	6.6%	1	4.3%	1	0.0%	0
Tesco Superstore, Cheriton High Street, Folkestone	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.8%	3
Tesco Metro, Whitefriars Shopping Centre, Gravel Walk, Canterbury	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	6.6%	1	0.0%	0
Tesco Express, Mill Hill, Deal	4.4%	10	0.0%	0	0.0%	0	23.4%	3	4.5%	1	21.2%	5	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Canterbury Road, Hawkinge	2.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	37.5%	6
Waitrose, St. Georges Centre, Canterbury	0.6%	1	0.0%	0	0.0%	0	2.7%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Prospect Road, Hythe	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Queen Street, Ramsgate	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash - local stores	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	0.0%	0
Deal - local stores	2.4%	6	1.9%	1	0.0%	0	2.7%	0	7.5%	2	2.9%	1	2.7%	1	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Deal - markets	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - local stores	1.1%	3	3.4%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0
Sandwich - local stores	4.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	19.1%	4	17.9%	5	0.0%	0	0.0%	0	0.0%	0
Wingham - local stores	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	1	0.0%	0	0.0%	0	3.3%	1
Other	1.4%	3	0.0%	0	0.0%	0	0.0%	0	7.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Internet - collection (click and collect)	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aylesham	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	2	0.0%	0	0.0%	0	0.0%	0
Canterbury - Other	2.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	8.4%	2	0.0%	0	16.1%	3	4.1%	1
Deal - Other	1.0%	2	0.0%	0	2.3%	1	0.0%	0	0.0%	0	6.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Other	0.8%	2	0.0%	0	7.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Other	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds)	0.2%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsdown	0.1%	0	0.0%	0	0.0%	0	2.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Margaret's - Other	0.1%	0	0.0%	0	0.0%	0	2.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.8%	2	0.0%	0	7.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield - Other	0.8%	2	0.0%	0	7.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham - Other	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	2	0.0%	0	5.2%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Weighted base:		231		39		24		12		32		25		20		27		18		17		16
Sample:		210		21		22		20		24		23		22		24		18		20		16

Q08AWhich internet / home delivery retailer do you also use for your top-up food shopping?
Those who also do top-up shopping via the Internet at Q08: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury’s	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		0		0		0		0		0		0		0		0		0		0		0
Sample:		0		0		0		0		0		0		0		0		0		0		0

Meanscore: [%]

Q09 Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping? (those who do top-up food shopping)
Those who do top-up food shopping at Q07

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
1 - 10%	0.6%	4	0.0%	0	0.7%	0	0.0%	0	0.9%	1	1.9%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.9%	1
11 - 20%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
21 - 30%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
31 - 40%	1.2%	7	0.7%	1	0.7%	0	0.0%	0	2.4%	2	3.9%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	0	2.0%	1
41 - 50%	6.2%	38	7.4%	9	3.8%	2	10.2%	3	13.5%	9	5.3%	4	9.4%	6	4.0%	2	0.0%	0	4.6%	2	2.6%	1
51 - 60%	7.7%	47	11.9%	15	4.4%	3	8.5%	2	9.9%	7	3.9%	3	3.7%	2	9.6%	5	13.2%	7	1.1%	0	5.5%	3
61 - 70%	10.6%	65	10.7%	13	3.9%	2	5.2%	1	23.3%	16	5.1%	4	5.8%	4	9.6%	5	18.9%	10	7.2%	3	12.6%	7
71 - 80%	32.0%	197	33.1%	40	30.1%	19	43.3%	11	18.1%	13	29.3%	21	32.6%	20	38.1%	22	41.9%	21	32.1%	12	30.7%	18
81 - 90%	22.6%	139	29.3%	36	30.2%	19	22.9%	6	15.3%	11	29.6%	21	16.0%	10	24.7%	14	9.8%	5	23.1%	9	16.5%	9
91 - 99%	3.9%	24	0.0%	0	7.5%	5	1.2%	0	6.2%	4	0.8%	1	1.4%	1	3.0%	2	0.0%	0	20.0%	7	6.8%	4
100%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know)	14.5%	89	7.0%	9	17.8%	11	8.6%	2	10.4%	7	20.2%	14	30.1%	18	8.2%	5	11.6%	6	10.8%	4	22.4%	13
(Refused)	0.5%	3	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0	0.0%	0
Mean:		*76.36*		*76.21*		*80.07*		*76.58*		*71.38*		*76.00*		*75.72*		*76.15*		*75.19*		*82.16*		*77.52*
Weighted base:		615		122		62		26		70		71		61		57		51		37		57
Sample:		583		60		64		50		65		62		60		64		49		52		57

Meanscore: [%]

Q09X Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping? (all respondents)

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
1 - 10%	0.4%	4	0.0%	0	0.5%	0	0.0%	0	0.5%	1	1.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.6%	1
11 - 20%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
21 - 30%	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
31 - 40%	0.7%	7	0.5%	1	0.5%	0	0.0%	0	1.5%	2	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.3%	1
41 - 50%	3.8%	38	4.9%	9	2.4%	2	5.4%	3	8.3%	9	3.3%	4	6.2%	6	2.5%	2	0.0%	0	2.8%	2	1.6%	1
51 - 60%	4.7%	47	7.9%	15	2.8%	3	4.5%	2	6.0%	7	2.5%	3	2.5%	2	6.1%	5	6.2%	7	0.7%	0	3.5%	3
61 - 70%	6.5%	65	7.1%	13	2.5%	2	2.8%	1	14.3%	16	3.2%	4	3.8%	4	6.1%	5	8.9%	10	4.5%	3	8.1%	7
71 - 80%	19.6%	197	21.9%	40	19.0%	19	22.9%	11	11.1%	13	18.4%	21	21.4%	20	24.0%	22	19.8%	21	19.7%	12	19.7%	18
81 - 90%	13.9%	139	19.4%	36	19.1%	19	12.1%	6	9.4%	11	18.6%	21	10.5%	10	15.5%	14	4.6%	5	14.2%	9	10.6%	9
91 - 99%	2.4%	24	0.0%	0	4.8%	5	0.7%	0	3.8%	4	0.5%	1	0.9%	1	1.9%	2	0.0%	0	12.3%	7	4.4%	4
100%	38.6%	386	33.7%	62	36.8%	36	47.1%	24	38.8%	44	37.1%	42	34.4%	32	37.1%	33	52.8%	57	38.5%	23	35.7%	32
(Dont know)	8.9%	89	4.6%	9	11.3%	11	4.6%	2	6.4%	7	12.7%	14	19.7%	18	5.1%	5	5.5%	6	6.7%	4	14.4%	13
(Refused)	0.3%	3	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Mean:		*86.40*		*84.62*		*88.37*		*88.15*		*83.24*		*86.20*		*86.13*		*85.47*		*89.38*		*89.52*		*86.91*
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q10 Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford Town Centre	1.7%	17	3.8%	6	1.9%	2	0.7%	0	0.7%	1	1.3%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	6.2%	5
Canterbury Town Centre	34.9%	335	18.3%	31	40.0%	39	50.8%	22	23.2%	26	18.7%	21	24.8%	23	58.9%	51	52.3%	55	63.4%	38	34.3%	30
Deal Town Centre	4.2%	40	0.0%	0	0.5%	0	6.0%	3	4.9%	6	23.4%	26	2.9%	3	0.0%	0	3.1%	3	0.0%	0	0.0%	0
Dover Town Centre	5.0%	48	10.6%	18	12.6%	12	8.6%	4	0.7%	1	1.3%	1	0.9%	1	2.0%	2	8.5%	9	0.0%	0	0.6%	1
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	8.7%	84	22.5%	38	8.8%	8	2.1%	1	1.0%	1	1.0%	1	0.0%	0	0.6%	1	3.3%	4	0.0%	0	35.4%	30
Margate Town Centre	0.8%	8	0.5%	1	4.1%	4	0.0%	0	0.7%	1	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ramsgate Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.5%	1	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wingham Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashford Designer Outlet, Ashford (Clark's, Gap, M&S)	2.5%	24	10.8%	18	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	2.7%	2	1.3%	1
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.7%	7	0.0%	0	0.0%	0	0.9%	0	0.7%	1	5.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
De Bradelei Wharf Designer Outlet, Dover (Jacques Vert, Peter England, Julian Charles)	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.7%	1	0.7%	0	0.0%	0
Maybrook Retail Park, Canterbury (DW Sports Fitness, M&S Simply Food, Halfords)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Orbital Park, Ashford (Ashford Foods, Barretts of Ashford, McDonald's)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	0.5%	5	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Stour Retail Park, Canterbury (Home Bargains, Matalan, TK Maxx)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	5	0.0%	0	0.7%	0	0.0%	0
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	1.2%	1	0.0%	0
Warren Retail Park, Ashford (Currys, Harveys, Home	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bargains)																						
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	15.8%	152	4.0%	7	4.5%	4	12.5%	6	49.7%	55	26.3%	29	39.9%	37	8.2%	7	4.4%	5	1.5%	1	1.3%	1
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	1.0%	10	2.3%	4	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0	3.8%	4	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	0.6%	6	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	1.3%	1	3.2%	3	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0
Other	1.4%	14	0.4%	1	1.9%	2	0.7%	0	3.7%	4	0.7%	1	0.6%	1	1.3%	1	0.6%	1	4.5%	3	1.2%	1
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Internet / catalogue / TV shopping	19.4%	186	26.6%	45	19.7%	19	14.2%	6	13.2%	15	20.3%	22	20.6%	19	15.3%	13	17.7%	19	23.9%	14	16.3%	14
Canterbury - Other	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Weighted base:		961		168		96		44		112		110		92		87		105		61		86
Sample:		959		91		98		93		96		97		98		95		96		99		96

Q11 How do you normally travel to (STORE OR CENTRE MENTIONED AT Q10)?
Those who buy clothing and footwear (excluding via the Internet) at Q10:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	69.1%	552	59.8%	82	71.7%	56	77.7%	31	73.0%	71	55.4%	50	80.4%	59	76.2%	57	72.9%	64	61.5%	28	72.4%	52
Car / van (as passenger)	9.6%	77	9.8%	14	8.4%	7	8.5%	3	15.8%	15	12.5%	11	9.0%	7	6.2%	5	10.4%	9	5.1%	2	5.1%	4
Bus, minibus or coach	14.1%	112	20.7%	28	13.8%	11	8.1%	3	4.9%	5	14.3%	13	7.4%	5	14.8%	11	15.3%	13	13.9%	6	21.7%	16
Using park & ride facility	0.8%	6	0.0%	0	1.3%	1	0.8%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.4%	1	6.0%	3	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	3.0%	24	6.5%	9	3.7%	3	0.0%	0	0.0%	0	12.2%	11	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Taxi	0.2%	2	0.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Train	2.1%	16	2.0%	3	0.0%	0	1.8%	1	4.2%	4	2.0%	2	0.0%	0	1.4%	1	0.0%	0	11.9%	5	0.7%	1
Bicycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / wheelchair	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	0.4%	3	0.0%	0	1.1%	1	1.5%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	0.6%	5	0.7%	1	0.0%	0	1.6%	1	1.5%	1	0.0%	0	1.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		798		138		79		40		98		90		73		75		88		46		72
Sample:		811		75		80		84		83		81		84		82		82		79		81

Q12 Where do you normally do most of your household's shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (Excluding video games)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Screwfix, Dover Business Park, Whitfield, Dover	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashford Town Centre	0.4%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury Town Centre	11.9%	63	6.1%	4	10.3%	5	5.7%	2	0.8%	1	3.4%	2	16.9%	9	37.1%	16	10.6%	7	33.1%	12	13.7%	5
Deal Town Centre	4.2%	22	0.0%	0	0.9%	0	1.2%	0	5.5%	4	23.4%	16	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	4.2%	22	5.8%	4	16.2%	8	6.0%	2	2.4%	2	0.0%	0	1.6%	1	0.0%	0	7.8%	5	0.0%	0	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	3.5%	19	10.2%	7	3.7%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.3%	1	1.7%	1	0.0%	0	21.1%	7
Margate Town Centre	0.5%	3	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ramsgate Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	6.5%	3	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.2%	1	0.0%	0	0.0%	0	1.5%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	2
Stour Retail Park, Canterbury (Home Bargains, Matalan, TK Maxx)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	4.6%	24	4.2%	3	0.9%	0	7.4%	2	11.2%	8	3.8%	3	13.8%	7	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park,	0.7%	4	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)																						
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	4.4%	23	4.2%	3	3.2%	2	3.5%	1	8.3%	6	0.9%	1	7.3%	4	2.9%	1	8.1%	6	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.3%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Other	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	1.1%	1	0.0%	0	1.5%	1
Internet / catalogue / TV shopping	62.4%	329	63.1%	45	58.8%	30	73.5%	20	70.0%	53	65.9%	45	51.8%	28	44.7%	20	69.7%	48	62.7%	22	57.5%	19
Canterbury - Other	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.2%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Weighted base:		527		72		50		28		75		68		53		44		68		35		34
Sample:		480		42		43		50		60		48		54		47		50		48		38

Q13 Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as TVs, cameras, ipads, telephones etc) and all other domestic electrical goods (such as irons, kettles, fridges, freezers, dishwashers etc)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
B&Q, Honeywood Parkway, Whitfield, Dover	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Park Farm Road, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Sturry Road, Canterbury	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Homebase, Wincheap Industrial Estate, Canterbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Ash Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Ashford Town Centre	0.5%	4	0.0%	0	1.7%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Broadstairs Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury Town Centre	8.8%	73	3.2%	5	7.4%	6	4.0%	2	10.7%	10	6.6%	6	3.8%	3	15.4%	13	18.8%	18	19.7%	11	0.0%	0
Deal Town Centre	3.1%	25	0.0%	0	0.6%	0	3.8%	2	3.1%	3	18.8%	17	4.1%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	8.3%	68	18.2%	26	22.3%	18	2.3%	1	12.7%	12	2.8%	2	0.0%	0	0.0%	0	8.5%	8	1.3%	1	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	2.4%	20	2.3%	3	2.3%	2	6.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	13.1%	9
Margate Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Ramsgate Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Ashford Designer Outlet, Ashford (Clark's, Gap, M&S)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.9%	8	0.0%	0	0.0%	0	1.4%	1	0.0%	0	3.7%	3	0.6%	0	3.2%	3	0.8%	1	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.1%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maybrook Retail Park, Canterbury (DW Sports Fitness, M&S Simply Food, Halfords)	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	3.9%	2	0.8%	1
Orbital Park, Ashford (Ashford Foods, Barretts of Ashford, McDonald's)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1
Park Farm Retail Park,	3.9%	32	3.1%	4	5.7%	5	3.4%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	2.2%	2	0.0%	0	28.2%	19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Folkestone (Clark's, Halfords, WH Smith)																						
Stour Retail Park, Canterbury (Home Bargains, Matalan, TK Maxx)	0.2%	2	0.0%	0	0.6%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	4.9%	40	1.0%	1	1.8%	1	2.2%	1	3.1%	3	0.7%	1	2.3%	2	17.1%	14	0.7%	1	28.1%	16	0.9%	1
Warren Retail Park, Ashford (Currys, Harveys, Home Bargains)	0.3%	2	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.3%	1	0.8%	1
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	5.3%	43	0.0%	0	0.0%	0	1.4%	1	15.6%	15	6.6%	6	25.0%	18	3.6%	3	0.7%	1	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	1.0%	8	0.0%	0	1.0%	1	2.4%	1	2.1%	2	1.9%	2	1.4%	1	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	1.7%	14	4.5%	6	0.0%	0	4.5%	2	1.5%	1	1.7%	1	0.7%	1	0.0%	0	2.7%	3	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	4.3%	36	4.3%	6	3.8%	3	6.1%	3	6.9%	7	1.9%	2	6.5%	5	0.8%	1	10.0%	9	1.3%	1	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	1.1%	9	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.7%	1	0.0%	0	6.6%	5	0.0%	0	4.1%	2	0.0%	0
Other	1.6%	13	1.6%	2	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.6%	0	4.0%	3	0.7%	1	4.1%	2	4.6%	3
Abroad	0.4%	3	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / TV shopping	47.4%	391	58.7%	83	52.3%	43	54.7%	23	42.9%	41	54.1%	48	47.6%	35	34.5%	28	47.3%	45	33.4%	19	38.4%	26
Canterbury - Other	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Other	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	6
Sandwich - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Walmer - Other	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.6%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Weighted base:		825		141		83		43		96		88		74		82		95		57		68
Sample:		804		77		76		83		83		75		78		90		82		91		69

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3
Canterbury Town Centre	13.3%	103	5.3%	7	10.4%	8	8.8%	4	8.7%	8	0.8%	1	9.5%	7	34.8%	24	13.5%	12	46.1%	25	13.1%	8
Deal Town Centre	11.9%	92	0.0%	0	0.0%	0	8.8%	4	30.7%	28	51.3%	48	16.8%	12	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	19.9%	153	63.8%	80	49.3%	39	29.6%	12	0.0%	0	0.8%	1	1.1%	1	0.0%	0	21.9%	19	1.3%	1	1.6%	1
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	3.1%	24	0.7%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	3.6%	3	0.0%	0	27.9%	17
Ramsgate Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	2.0%	15	0.0%	0	5.0%	4	0.0%	0	0.0%	0	0.6%	1	11.2%	8	2.6%	2	0.9%	1	0.0%	0	0.0%	0
Ashford Designer Outlet, Ashford (Clark's, Gap, M&S)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.1%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maybrook Retail Park, Canterbury (DW Sports Fitness, M&S Simply Food, Halfords)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	2.7%	1	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	3.6%	28	0.0%	0	1.6%	1	1.0%	0	10.9%	10	2.4%	2	15.5%	11	2.0%	1	1.7%	1	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park,	0.3%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)																						
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	2.0%	15	0.7%	1	2.4%	2	2.3%	1	2.0%	2	0.0%	0	0.8%	1	1.0%	1	9.5%	8	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	5	0.0%	0	2.1%	1	0.0%	0
Other	1.6%	12	0.0%	0	2.3%	2	2.7%	1	2.7%	2	0.0%	0	0.0%	0	0.8%	1	1.7%	1	0.0%	0	8.6%	5
Internet / catalogue / TV shopping	38.9%	299	28.8%	36	26.5%	21	44.6%	19	45.0%	40	41.5%	38	39.9%	29	39.5%	27	47.3%	41	45.0%	25	40.1%	24
Aylesham Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0
Canterbury - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Dover - Charlton Green	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Weighted base:		769		125		80		42		90		93		72		69		86		55		59
Sample:		773		72		76		81		80		80		79		73		78		88		66

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ash Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Ashford Town Centre	0.5%	4	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Broadstairs Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury Town Centre	9.3%	64	4.0%	6	10.5%	7	5.5%	2	2.5%	2	0.8%	1	9.7%	6	30.6%	19	16.6%	12	19.2%	8	3.6%	2
Deal Town Centre	7.5%	52	4.4%	6	0.0%	0	10.0%	4	14.9%	11	37.7%	28	2.2%	1	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	16.6%	115	39.0%	57	43.3%	29	8.3%	3	4.3%	3	8.4%	6	2.1%	1	2.0%	1	17.2%	12	1.8%	1	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	3.3%	23	1.2%	2	0.0%	0	0.9%	0	0.0%	0	3.3%	2	0.0%	0	1.7%	1	2.0%	1	0.0%	0	29.5%	16
Margate Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ramsgate Town Centre	0.4%	3	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.9%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	1.0%	7	0.0%	0	5.9%	4	0.0%	0	0.0%	0	0.0%	0	3.4%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	3.0%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	2.0%	14	5.0%	7	2.8%	2	6.1%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Orbital Park, Ashford (Ashford Foods, Barretts of Ashford, McDonald's)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	1.8%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	21.0%	11
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	1.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	7	0.0%	0	8.1%	3	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	7.8%	54	2.0%	3	5.6%	4	6.9%	3	28.8%	21	6.4%	5	18.2%	11	8.1%	5	2.2%	2	1.8%	1	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.8%	6	0.0%	0	0.0%	0	1.9%	1	0.0%	0	1.5%	1	6.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs	1.0%	7	2.7%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.0%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
(Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)																						
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	5.5%	38	5.2%	8	2.8%	2	10.6%	4	13.0%	10	0.8%	1	7.3%	4	1.1%	1	12.9%	9	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.3%	2	0.0%	0	0.8%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	3.2%	22	0.0%	0	0.0%	0	7.4%	3	1.0%	1	0.0%	0	0.9%	1	2.0%	1	12.9%	9	17.2%	7	0.0%	0
Other	0.9%	6	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	4	2.7%	1
Internet / catalogue / TV shopping	33.2%	230	31.0%	45	26.9%	18	36.8%	14	34.1%	25	36.3%	27	33.8%	21	26.7%	17	32.7%	24	39.7%	16	42.0%	23
Canterbury - Other	0.9%	6	0.5%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	5	0.0%	0	1.0%	0	0.0%	0
Charlton Shopping Centre, Dover	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Charlton Green	0.5%	4	2.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walmer - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.1%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		692		147		68		38		74		74		61		62		72		42		55
Sample:		588		67		59		67		58		55		55		65		53		61		48

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
B&Q, Honeywood Parkway, Whitfield, Dover	1.1%	7	0.9%	1	6.7%	5	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Park Farm Road, Folkestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
B&Q, Sturry Road, Canterbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Carpetright, Granville Street, Dover	0.6%	4	1.4%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Homebase, Dover Business Park, Dover	0.5%	3	3.1%	3	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Wincheap Industrial Estate, Canterbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Ashford Town Centre	0.5%	3	1.4%	1	0.0%	0	2.0%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Canterbury Town Centre	20.5%	130	21.0%	20	9.9%	7	28.4%	8	8.5%	7	10.3%	8	13.6%	8	31.2%	17	24.2%	18	61.8%	26	22.6%	10
Deal Town Centre	10.5%	66	0.0%	0	0.6%	0	4.9%	1	33.7%	27	39.0%	29	9.2%	6	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Dover Town Centre	10.7%	68	28.2%	27	23.8%	17	11.1%	3	2.3%	2	4.4%	3	0.7%	0	1.3%	1	18.6%	13	0.0%	0	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	1.8%	12	2.6%	3	0.0%	0	2.4%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	3.6%	3	0.0%	0	9.9%	4
Margate Town Centre	0.2%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	1.3%	8	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	7.0%	4	0.0%	0	3.6%	3	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.6%	4	0.0%	0	2.6%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Charlton Shopping Centre, Dover (Country Carpets & Furniture, International Store, Sleepyhead Beds Ltd.)	0.7%	5	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	2.5%	2	0.0%	0	0.0%	0
De Bradelei Wharf Designer Outlet, Dover (Jacques Vert, Peter England, Julian Charles)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.6%	3	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's,	1.7%	10	1.7%	2	1.9%	1	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.5%	7

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Halfords, WH Smith)																						
Stour Retail Park, Canterbury (Home Bargains, Matalan, TK Maxx)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	2.3%	14	3.1%	3	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.9%	1	13.4%	7	0.0%	0	6.6%	3	0.0%	0
Warren Retail Park, Ashford (Currys, Harveys, Home Bargains)	0.6%	4	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	6.1%	39	0.0%	0	2.6%	2	0.0%	0	9.7%	8	4.2%	3	26.2%	16	5.5%	3	9.1%	7	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	4.4%	28	9.7%	9	0.0%	0	10.9%	3	7.1%	6	3.1%	2	8.1%	5	2.3%	1	1.1%	1	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	1.4%	9	0.9%	1	0.0%	0	0.0%	0	2.7%	2	1.5%	1	3.9%	2	2.9%	2	0.0%	0	1.8%	1	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	0.6%	4	0.8%	1	0.6%	0	3.4%	1	0.0%	0	0.8%	1	0.7%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	3.8%	24	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	3	12.1%	7	11.2%	8	10.9%	5	2.8%	1
Other	3.6%	22	0.0%	0	8.8%	6	5.6%	2	6.4%	5	0.0%	0	0.0%	0	0.0%	0	1.6%	1	5.8%	2	12.4%	6
Internet / catalogue / TV shopping	23.8%	150	22.2%	22	27.7%	20	16.1%	5	25.6%	21	33.4%	25	24.5%	15	22.9%	12	15.3%	11	12.1%	5	32.0%	15
Folkestone - Other	0.6%	4	0.0%	0	5.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walmer - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.7%	5	0.0%	0	2.6%	2	9.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		631		97		73		30		81		75		61		54		72		42		45
Sample:		616		54		67		55		71		59		69		63		59		65		54

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
B&Q, Honeywood Parkway, Whitfield, Dover	48.3%	407	75.8%	112	69.4%	55	56.4%	24	59.8%	61	37.5%	34	28.5%	22	21.2%	15	74.6%	77	5.8%	3	5.0%	4
B&Q, Norman Road, Ashford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Park Farm Road, Folkestone	1.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.6%	16
B&Q, Sturry Road, Canterbury	7.5%	63	2.0%	3	0.0%	0	6.5%	3	0.0%	0	0.0%	0	0.7%	1	34.1%	25	0.6%	1	55.3%	29	3.6%	3
B&Q, Westwood Industrial Estate, Enterprise Road, Margate	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	5	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Halfords, Granville Street, Dover	0.4%	4	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0
Homebase, Churchill Avenue, Folkestone	3.4%	29	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.2%	1	0.6%	0	0.0%	0	1.2%	1	0.0%	0	33.8%	25
Homebase, Dover Business Park, Dover	9.7%	82	5.5%	8	20.3%	16	13.3%	6	13.8%	14	11.8%	11	17.3%	14	1.5%	1	10.6%	11	2.2%	1	0.0%	0
Homebase, Westwood Gateway Retail Park, Westwood, Broadstairs	1.2%	10	0.0%	0	0.0%	0	1.4%	1	3.1%	3	0.0%	0	1.4%	1	7.5%	5	0.0%	0	0.0%	0	0.0%	0
Homebase, Wincheap Industrial Estate, Canterbury	1.7%	14	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.0%	1	11.8%	9	0.0%	0	9.0%	5	0.0%	0
Hutchings Timber Yard, Albert Road, Deal	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.4%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jewson, Coombe Valley Road, Dover	1.2%	10	4.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dover Business Park, Whitfield, Dover	1.5%	12	2.0%	3	0.6%	0	10.4%	4	0.7%	1	0.8%	1	2.1%	2	0.8%	1	0.6%	1	0.0%	0	0.0%	0
Canterbury Town Centre	1.7%	14	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.5%	1	1.6%	1	2.5%	2	1.5%	2	9.9%	5	3.5%	3
Deal Town Centre	4.6%	39	0.0%	0	0.0%	0	5.5%	2	9.9%	10	27.1%	25	1.7%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Dover Town Centre	2.2%	18	3.2%	5	1.9%	1	1.7%	1	1.3%	1	3.9%	4	4.8%	4	0.0%	0	2.8%	3	0.0%	0	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	0.7%	6	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.0%	0	4.5%	3
Sandwich Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.8%	7	4.2%	6	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	2.8%	24	2.0%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.7%	20
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.9%	2	4.9%	4	4.6%	3	0.0%	0	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.9%	2	0.6%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	1.3%	11	0.0%	0	2.9%	2	2.6%	1	3.1%	3	0.0%	0	3.8%	3	0.8%	1	0.8%	1	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	1	0.0%	0	8.8%	5	0.0%	0
Other	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	1	0.0%	0	0.8%	1	0.0%	0	1.5%	1	0.7%	1
Internet / catalogue / TV shopping	2.4%	20	0.0%	0	2.5%	2	0.0%	0	2.2%	2	2.7%	2	8.5%	7	7.2%	5	0.8%	1	0.8%	0	0.7%	1
Alkham Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Whitfield Village Centre	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Weighted base:		844		147		79		43		102		91		79		72		103		52		75
Sample:		826		81		82		81		85		77		82		83		92		83		80

Q18 Where do you normally do most of your household's shopping on all goods for personal care (including, electric razors, hair dryers, bathroom scales, cosmetics, perfume, toothpaste, etc), other medical and pharmaceutical products (e.g. vitamins, plasters) and therapeutic appliances (e.g. spectacles, hearing aids, wheelchairs, contact lenses etc)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ash Village Centre	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	9	0.0%	0	0.0%	0	0.7%	1
Ashford Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Broadstairs Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury Town Centre	9.8%	87	3.5%	6	5.2%	5	3.8%	2	0.0%	0	0.0%	0	5.7%	5	34.2%	25	9.5%	8	54.1%	30	8.3%	6
Deal Town Centre	24.4%	218	0.0%	0	1.1%	1	31.3%	15	74.9%	83	88.2%	94	25.0%	20	1.4%	1	3.9%	3	1.3%	1	0.0%	0
Dover Town Centre	29.5%	264	88.6%	144	56.5%	52	29.3%	14	6.7%	7	0.7%	1	7.2%	6	0.0%	0	45.2%	39	0.0%	0	2.0%	2
Eastry Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.4%	1	0.9%	1	0.0%	0	0.0%	0
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	5.4%	48	2.9%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	5.4%	5	0.0%	0	49.5%	38
Ramsgate Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	2.8%	25	0.0%	0	4.4%	4	0.0%	0	0.0%	0	0.6%	1	22.9%	19	1.5%	1	0.0%	0	1.3%	1	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Honeywood Retail Park, Whitfield, Dover (B&M, Bensons for Beds, Tesco Extra)	0.2%	2	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park Farm Retail Park, Folkestone (Clark's, Halfords, WH Smith)	1.1%	10	0.0%	0	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	6.4%	5
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	0.0%	0	1.3%	1	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	1.6%	15	0.0%	0	0.0%	0	0.7%	0	2.0%	2	1.1%	1	11.2%	9	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	0.6%	5	0.0%	0	0.0%	0	0.0%	0	4.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins, Buildbase)	9.7%	86	1.4%	2	27.2%	25	20.7%	10	4.6%	5	3.5%	4	21.1%	17	1.7%	1	25.7%	22	0.0%	0	0.0%	0
Whitefriars Shopping Centre, Canterbury (Boots, H&M,	0.6%	5	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0	2.8%	2	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
HMV)																						
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	16.5%	9	0.0%	0
Other	1.2%	10	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.4%	1	0.7%	1	1.4%	1	8.1%	6
Abroad	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / TV shopping	6.1%	54	2.7%	4	0.0%	0	5.2%	2	6.7%	7	3.9%	4	2.4%	2	14.7%	11	5.6%	5	6.4%	4	18.8%	14
Aylesham Village Centre	1.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	12	0.0%	0	0.0%	0	0.0%	0
Bridge Village Centre	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	6	0.0%	0
Canterbury - Other	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	2.8%	2	0.0%	0
Dover - Charlton Green	0.2%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Other	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	6.2%	5
Walmer - Other	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitfield Village Centre	0.4%	3	0.0%	0	0.0%	0	6.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Weighted base:		893		162		91		47		111		106		81		75		86		56		77
Sample:		897		90		88		93		96		94		84		87		81		93		91

Q19 Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses);
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford Town Centre	1.9%	10	6.3%	6	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	4.3%	2
Canterbury Town Centre	33.6%	171	21.3%	22	32.5%	21	41.6%	10	37.4%	27	22.0%	8	32.3%	13	40.8%	17	47.6%	23	70.3%	23	16.0%	8
Deal Town Centre	8.8%	45	0.0%	0	0.9%	1	18.0%	4	21.1%	15	29.4%	11	21.0%	8	5.0%	2	6.7%	3	0.0%	0	0.0%	0
Dover Town Centre	10.5%	53	16.4%	17	33.2%	21	7.8%	2	3.3%	2	0.0%	0	0.0%	0	3.9%	2	19.2%	9	0.0%	0	1.1%	1
Folkestone Town Centre (includes Bouverie Place - TK Maxx, Asda, Primemark)	6.8%	34	8.4%	9	0.0%	0	5.0%	1	0.0%	0	1.9%	1	0.0%	0	1.4%	1	2.9%	1	0.0%	0	45.5%	22
Ramsgate Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1	2.3%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Ashford Designer Outlet, Ashford (Clark's, Gap, M&S)	2.0%	10	6.9%	7	3.0%	2	5.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadstairs Retail Park, Westwood, Broadstairs (Tesco Extra, Currys, PC World, The Range, Wickes, Dreams, Laura Ashley)	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stour Retail Park, Canterbury (Home Bargains, Matalan, TK Maxx)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Sturry Road Retail Park, Canterbury (Asda, Halfords, Barretts Honda)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	1.2%	0	0.0%	0
Westwood Cross Shopping Centre, Broadstairs (Next, Primark, River Island)	2.7%	14	0.0%	0	0.7%	0	1.4%	0	6.7%	5	0.0%	0	16.0%	6	4.2%	2	0.0%	0	0.0%	0	0.0%	0
Westwood Gateway Retail Park, Westwood, Broadstairs (Homebase, Argos, Sports Direct, Maplin, Bathstore, Furnitureland)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood Retail Park, Westwood, Broadstairs (Matalan, Dunelm, Pets at Home, B&M, Halfords, Carpetwright, Harveys)	1.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	11.8%	5	0.0%	0	0.0%	0	0.0%	0
White Cliffs Business Park, Whitfield, Dover (Tesco Extra, Travis Perkins,	2.0%	10	0.0%	0	10.2%	6	6.7%	2	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Buildbase)																						
Whitefriars Shopping Centre, Canterbury (Boots, H&M, HMV)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Wincheap Retail Park, Canterbury (Clark's, Dunelm, Pets at Home)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0
Other	2.0%	10	0.9%	1	6.3%	4	0.0%	0	1.0%	1	2.9%	1	2.1%	1	0.0%	0	0.0%	0	1.2%	0	4.3%	2
Abroad	1.3%	7	0.0%	0	3.9%	2	2.7%	1	1.0%	1	3.5%	1	0.0%	0	0.0%	0	1.6%	1	2.7%	1	0.0%	0
Internet / catalogue / TV shopping	24.9%	127	39.7%	41	8.4%	5	11.3%	3	25.1%	18	30.4%	12	21.2%	8	22.7%	9	22.0%	11	18.7%	6	28.8%	14
Weighted base:		510		102		63		24		73		38		39		41		48		33		48
Sample:		475		52		58		47		51		32		42		50		42		51		50

Meanscore: [Number of visits per week]

Q20 How often do you or your household visit Dover for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	3.0%	30	12.1%	22	5.2%	5	0.7%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	0	0.0%	0
4-6 days a week	1.0%	10	1.6%	3	0.9%	1	1.8%	1	1.0%	1	0.6%	1	0.0%	0	1.1%	1	2.2%	2	0.0%	0	0.0%	0
2-3 days a week	7.1%	71	23.0%	43	12.2%	12	8.8%	4	2.1%	2	0.6%	1	0.5%	0	0.6%	1	7.0%	8	0.0%	0	0.7%	1
One day a week	16.9%	169	34.6%	64	35.2%	34	20.2%	10	2.9%	3	7.2%	8	8.4%	8	6.6%	6	28.1%	30	3.2%	2	3.1%	3
Every two weeks	8.2%	82	11.9%	22	8.5%	8	9.2%	5	6.6%	8	9.2%	10	9.3%	9	3.1%	3	15.1%	16	0.0%	0	1.1%	1
Monthly	8.1%	81	5.1%	9	9.9%	10	13.2%	7	13.0%	15	5.6%	6	7.6%	7	5.2%	5	16.9%	18	0.7%	0	4.6%	4
Once every two months	3.8%	38	4.1%	8	3.7%	4	17.1%	9	3.7%	4	1.2%	1	5.3%	5	1.8%	2	1.2%	1	1.9%	1	4.6%	4
Three-four times a year	6.3%	63	3.3%	6	3.9%	4	7.8%	4	4.2%	5	6.7%	8	12.5%	12	3.5%	3	8.7%	9	11.4%	7	6.1%	5
Once a year	4.3%	43	0.0%	0	1.1%	1	2.8%	1	3.8%	4	10.0%	11	6.7%	6	9.4%	8	0.6%	1	8.3%	5	4.8%	4
Less often	3.1%	31	0.9%	2	2.5%	2	2.3%	1	6.2%	7	2.0%	2	2.3%	2	5.7%	5	0.6%	1	1.2%	1	8.4%	7
Never	36.9%	369	2.5%	5	14.7%	14	16.2%	8	54.6%	62	56.8%	65	46.8%	43	62.9%	57	13.8%	15	71.8%	44	63.8%	57
(Don’t know)	0.8%	8	0.9%	2	1.5%	1	0.0%	0	0.6%	1	0.0%	0	0.5%	0	0.0%	0	3.1%	3	0.7%	0	0.0%	0
(Varies)	0.6%	6	0.0%	0	0.6%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	2.9%	3
Mean:		*0.69*		*1.95*		*1.18*		*0.67*		*0.26*		*0.19*		*0.19*		*0.18*		*0.81*		*0.11*		*0.08*
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q21 What do you like about Dover? [MR]

Those who visit Dover for shopping and other town centre uses at Q20

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	7.4%	46	9.7%	17	18.0%	15	11.3%	5	4.4%	2	5.2%	3	0.9%	0	5.0%	2	1.7%	2	4.7%	1	0.0%	0
Close to friends or relatives	2.0%	12	0.0%	0	4.8%	4	0.0%	0	2.1%	1	0.0%	0	12.5%	6	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Close to home	19.5%	123	41.6%	75	25.4%	21	21.8%	9	5.8%	3	1.5%	1	2.0%	1	1.7%	1	12.7%	12	0.0%	0	3.6%	1
Close to work	4.6%	29	13.2%	24	0.7%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	4.3%	1	6.5%	2
Compact	1.3%	8	1.8%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	8.2%	3	1.4%	1	0.0%	0	0.0%	0
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.9%	6	0.0%	0	2.2%	2	0.0%	0	2.1%	1	0.0%	0	4.8%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Easy to park	2.3%	15	0.5%	1	0.0%	0	7.8%	3	4.2%	2	2.2%	1	0.0%	0	8.9%	3	1.5%	1	4.3%	1	6.8%	2
Good facilities in general	1.6%	10	1.0%	2	3.8%	3	1.4%	1	2.1%	1	0.0%	0	0.0%	0	5.8%	2	0.7%	1	2.3%	0	1.6%	1
Good food stores	3.2%	20	0.4%	1	0.6%	0	1.0%	0	11.1%	6	22.3%	11	1.1%	1	1.7%	1	0.0%	0	0.0%	0	2.0%	1
Good pubs, cafés or restaurants	0.4%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.6%	1
Good range of non-food shops	3.2%	20	0.0%	0	1.9%	2	3.2%	1	4.7%	2	2.2%	1	4.6%	2	3.7%	1	8.7%	8	2.3%	0	4.9%	2
Good range of independent shops	0.6%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.5%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	2.0%	1
Good range of 'high street' retailers / multiples	4.3%	27	3.6%	6	1.0%	1	0.0%	0	12.8%	7	15.6%	8	1.8%	1	3.1%	1	0.7%	1	0.0%	0	9.7%	3
Affordable shops	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
High quality shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
The street market	0.4%	3	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Makes a change from other places	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	6.7%	1	0.0%	0
Quiet	0.5%	3	0.5%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.2%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0
Traditional	3.7%	24	2.6%	5	7.0%	6	4.4%	2	1.1%	1	3.9%	2	0.9%	0	6.8%	2	5.9%	6	2.3%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi store	0.6%	4	0.0%	0	0.0%	0	0.0%	0	3.5%	2	3.0%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Familiar / know where everything is	1.5%	9	2.5%	4	2.4%	2	1.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	2.9%	1
Free parking on a Sunday	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Friendly people / good atmosphere	0.6%	4	0.8%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.3%	0	3.6%	1
Good charity shops	0.1%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer store	1.3%	8	0.0%	0	1.2%	1	1.4%	1	4.7%	2	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	9.4%	3
Nice castle	0.7%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	2	0.0%	0	9.6%	2	2.0%	1
Nice fountain	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Nice seafront	3.1%	19	0.4%	1	4.1%	3	0.0%	0	1.1%	1	6.2%	3	2.6%	1	3.3%	1	5.2%	5	9.6%	2	8.1%	3
No traffic	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0
Pedestrianised	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
(Dont know)	1.4%	9	0.8%	1	1.1%	1	0.0%	0	6.1%	3	1.2%	1	1.7%	1	0.0%	0	0.0%	0	7.2%	1	1.6%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
(Nothing / very little)	46.3%	292	35.1%	63	43.6%	36	52.7%	22	50.9%	26	39.1%	19	66.8%	33	47.1%	16	59.0%	55	41.4%	7	44.5%	14
Weighted base:		631		180		83		42		52		49		49		33		93		17		32
Sample:		586		97		88		81		44		43		44		40		86		28		35

Q22 What could be improved about Dover that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	0.6%	6	0.0%	0	0.5%	0	5.7%	3	1.0%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.6%	1
Better public transport	0.6%	6	0.0%	0	0.9%	1	0.0%	0	2.1%	2	0.6%	1	0.5%	0	0.0%	0	0.0%	0	0.7%	0	1.2%	1
Better signposting	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.6%	1	2.7%	2	0.0%	0
Cleaner streets	5.9%	59	1.3%	2	3.8%	4	11.0%	5	14.5%	17	9.5%	11	2.5%	2	3.0%	3	9.7%	10	1.2%	1	4.1%	4
Facilities which would assist you if shopping with children	0.3%	3	0.5%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	1.9%	19	2.4%	4	0.5%	0	2.6%	1	0.5%	1	1.9%	2	1.2%	1	5.1%	5	2.2%	2	0.0%	0	2.4%	2
More / better town centre events	0.4%	4	1.6%	3	0.6%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	8.5%	85	10.1%	19	13.7%	13	11.1%	6	6.3%	7	4.1%	5	6.8%	6	2.9%	3	19.2%	21	0.7%	0	6.6%	6
More / better value or affordable shops	3.7%	37	9.8%	18	4.2%	4	7.8%	4	1.6%	2	0.0%	0	2.6%	2	0.0%	0	5.1%	6	1.9%	1	0.0%	0
More / better entertainment	0.4%	4	0.0%	0	0.5%	0	2.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
More / better places for eating out (e.g. cafes and restaurants)	1.8%	18	4.4%	8	2.8%	3	6.3%	3	1.5%	2	0.0%	0	0.6%	1	0.0%	0	1.1%	1	0.7%	0	0.0%	0
More / better food shops	3.5%	35	4.0%	7	3.4%	3	4.3%	2	0.6%	1	4.6%	5	1.8%	2	2.5%	2	9.4%	10	1.2%	1	1.4%	1
More / better parking	2.9%	29	1.4%	3	1.5%	1	3.2%	2	6.0%	7	1.0%	1	7.3%	7	7.7%	7	0.6%	1	0.0%	0	1.9%	2
More / better pedestrianised streets	0.3%	3	0.0%	0	2.4%	2	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	1.3%	13	3.5%	6	0.0%	0	0.0%	0	5.5%	6	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
More / better seats / flower displays	0.5%	5	0.5%	1	2.4%	2	1.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
More / better services	0.3%	3	0.0%	0	0.6%	1	1.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.7%	0	0.7%	1
More advertising	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	30.5%	306	58.3%	108	49.3%	48	38.7%	19	24.7%	28	12.9%	15	25.2%	23	19.6%	18	30.5%	33	4.4%	3	12.1%	11
More independent shops	24.3%	243	41.3%	76	36.6%	36	34.2%	17	20.3%	23	15.8%	18	24.1%	22	13.1%	12	24.1%	26	2.6%	2	12.7%	11
Street markets - physical improvements	0.9%	9	3.5%	6	0.6%	1	0.7%	0	0.0%	0	0.5%	1	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.2%	2	0.5%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Protection from the weather (ie. covered shopping malls)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	2.9%	3	0.7%	1	0.0%	0	0.0%	0
Shops / services open on Sundays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better leisure facilities	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Better security / more police	1.6%	16	0.7%	1	1.1%	1	3.6%	2	4.7%	5	2.2%	3	0.0%	0	1.8%	2	0.6%	1	2.5%	2	0.6%	1
Better street lighting	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Complete the St James development	0.7%	7	0.0%	0	2.5%	2	0.0%	0	1.7%	2	0.5%	1	1.8%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Dorothy Perkins store	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve the De Bradelei Wharf outlet centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Improve the link between the centre and the seafront	0.4%	4	0.7%	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Improve the seafront	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved pavements	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0
John Lewis store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Less charity shops	1.4%	14	3.9%	7	2.8%	3	0.7%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Less empty shops	1.8%	18	0.0%	0	0.9%	1	4.3%	2	5.2%	6	1.2%	1	0.0%	0	0.6%	1	5.4%	6	0.0%	0	1.1%	1
Less homeless people	0.4%	4	0.4%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.0%	0	0.0%	0
Less traffic congestion	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.6%	1	0.0%	0	1.5%	1	0.0%	0
Make it look more attractive	3.3%	33	0.5%	1	1.4%	1	4.1%	2	14.3%	16	1.0%	1	0.5%	0	0.6%	1	2.4%	3	7.9%	5	3.1%	3
Make the town centre more spread out	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
More compact shopping area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Next store	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Nicer people / atmosphere	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
No HGV park	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Revamp it	4.5%	45	5.5%	10	11.0%	11	4.1%	2	3.4%	4	3.4%	4	8.1%	8	0.6%	1	5.1%	6	1.2%	1	0.0%	0
Sainsbury's store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Starbucks coffee shop	0.3%	3	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wilko store	0.3%	3	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	12.3%	123	4.4%	8	0.0%	0	5.9%	3	8.4%	10	11.0%	12	17.9%	17	29.4%	27	2.8%	3	28.1%	17	30.4%	27
(Nothing)	26.2%	262	15.1%	28	12.8%	12	9.9%	5	28.5%	33	51.0%	58	22.3%	21	32.6%	29	12.8%	14	44.8%	27	39.9%	35
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Meanscore: [Number of visits per week]

Q23 How often do you or your household visit Deal for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	3.8%	38	0.7%	1	4.1%	4	2.0%	1	7.4%	8	14.6%	17	2.5%	2	0.0%	0	0.0%	0	0.0%	0	5.0%	4
4-6 days a week	3.2%	32	3.5%	6	0.5%	0	3.8%	2	3.9%	4	12.1%	14	5.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	10.3%	103	0.7%	1	0.5%	0	18.6%	9	30.0%	34	41.7%	47	10.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One day a week	15.2%	152	5.6%	10	7.0%	7	34.5%	17	45.3%	52	15.9%	18	26.5%	24	7.8%	7	12.6%	14	4.3%	3	0.0%	0
Every two weeks	5.4%	54	3.8%	7	2.9%	3	8.7%	4	2.9%	3	10.8%	12	10.1%	9	6.9%	6	4.7%	5	2.7%	2	1.8%	2
Monthly	7.3%	73	6.1%	11	6.3%	6	7.5%	4	1.9%	2	0.6%	1	20.6%	19	12.3%	11	11.0%	12	4.0%	2	5.1%	4
Once every two months	4.2%	42	2.7%	5	5.5%	5	1.3%	1	0.0%	0	1.0%	1	5.4%	5	6.2%	6	12.2%	13	7.1%	4	1.9%	2
Three-four times a year	5.5%	55	6.7%	12	9.3%	9	3.3%	2	0.0%	0	0.6%	1	3.1%	3	8.3%	7	6.2%	7	17.6%	11	4.2%	4
Once a year	4.9%	49	2.0%	4	8.3%	8	10.1%	5	0.0%	0	0.0%	0	6.2%	6	12.2%	11	3.7%	4	7.1%	4	8.3%	7
Less often	3.2%	32	8.4%	15	6.5%	6	1.8%	1	1.3%	1	1.0%	1	0.6%	1	1.2%	1	0.0%	0	2.5%	2	4.2%	4
Never	35.9%	360	59.0%	109	48.9%	48	7.7%	4	2.8%	3	0.5%	1	8.1%	7	45.1%	41	48.2%	52	54.6%	33	69.5%	62
(Don’t know)	0.3%	3	0.4%	1	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
(Varies)	0.8%	8	0.4%	1	0.0%	0	0.7%	0	4.5%	5	1.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.90*		*0.35*		*0.44*		*1.22*		*2.03*		*2.92*		*1.12*		*0.16*		*0.20*		*0.09*		*0.38*
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q24 What do you like about Deal? [MR]
Those who visit Deal for shopping and other town centre uses at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	48.0%	308	50.5%	38	53.4%	27	58.9%	27	43.7%	49	46.1%	52	29.5%	25	41.3%	20	63.0%	35	42.6%	12	83.9%	23
Close to friends or relatives	2.6%	17	8.5%	6	4.9%	2	0.0%	0	0.0%	0	1.5%	2	5.2%	4	3.2%	2	0.0%	0	1.5%	0	0.0%	0
Close to home	14.2%	91	8.5%	6	0.0%	0	9.9%	5	25.1%	28	33.4%	38	14.7%	13	2.1%	1	0.0%	0	2.7%	1	0.0%	0
Close to work	1.9%	12	7.0%	5	8.0%	4	0.0%	0	0.7%	1	0.7%	1	1.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Compact	6.9%	45	3.0%	2	3.7%	2	20.4%	9	8.1%	9	7.8%	9	8.8%	8	3.4%	2	5.7%	3	2.9%	1	0.0%	0
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.2%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.4%	2	0.0%	0	0.0%	0	0.7%	0	0.5%	1	0.5%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to park	2.7%	18	0.0%	0	0.0%	0	3.7%	2	8.5%	10	0.7%	1	0.6%	1	5.3%	3	2.3%	1	4.1%	1	0.0%	0
Good facilities in general	2.3%	15	0.0%	0	9.8%	5	3.6%	2	1.6%	2	2.2%	2	1.0%	1	1.1%	1	1.4%	1	5.9%	2	0.0%	0
Good food stores	1.3%	9	0.0%	0	0.0%	0	0.7%	0	0.5%	1	0.5%	1	3.7%	3	2.5%	1	2.1%	1	5.3%	1	0.0%	0
Good pubs, cafés or restaurants	7.0%	45	5.8%	4	0.0%	0	15.0%	7	8.3%	9	7.6%	9	13.4%	11	0.0%	0	4.8%	3	4.7%	1	1.9%	1
Good range of non-food shops	6.6%	43	1.2%	1	4.7%	2	15.5%	7	5.1%	6	3.6%	4	6.3%	5	5.7%	3	21.7%	12	7.4%	2	0.0%	0
Good range of independent shops	21.8%	140	18.1%	14	13.5%	7	23.9%	11	18.7%	21	22.6%	25	15.9%	13	22.8%	11	25.3%	14	32.5%	9	52.4%	14
Good range of 'high street' retailers / multiples	4.2%	27	3.2%	2	0.9%	0	7.0%	3	6.9%	8	6.8%	8	1.7%	1	3.6%	2	3.7%	2	0.0%	0	0.0%	0
Affordable shops	1.2%	7	0.0%	0	0.0%	0	7.0%	3	0.0%	0	0.0%	0	1.5%	1	2.1%	1	1.4%	1	4.1%	1	0.0%	0
High quality shops	3.7%	23	7.9%	6	14.2%	7	3.1%	1	0.5%	1	2.8%	3	3.8%	3	0.0%	0	0.0%	0	1.5%	0	5.7%	2
The street markets	0.7%	4	1.8%	1	0.9%	0	2.0%	1	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Makes a change from other places	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.4%	1	1.5%	0	1.9%	1
Quiet	3.1%	20	1.0%	1	1.8%	1	1.4%	1	2.2%	2	5.7%	6	5.2%	4	6.2%	3	0.0%	0	1.5%	0	2.3%	1
Safe and secure	1.3%	8	1.0%	1	0.9%	0	0.7%	0	2.7%	3	2.2%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traditional	9.9%	63	14.3%	11	8.2%	4	7.7%	4	5.5%	6	10.4%	12	5.2%	4	12.4%	6	2.1%	1	14.2%	4	41.6%	11
Traffic free shopping centre	0.6%	4	0.0%	0	0.0%	0	1.3%	1	0.7%	1	0.0%	0	0.5%	0	1.1%	1	1.1%	1	2.7%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clean	1.0%	6	1.0%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	4.6%	3	0.0%	0	0.0%	0
Cultural	0.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Doesn't have any empty shops	0.4%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Familiar / know where everything is	1.5%	10	0.0%	0	1.1%	1	0.0%	0	1.6%	2	2.0%	2	5.1%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Friendly people / good atmosphere	4.0%	25	0.0%	0	2.1%	1	0.0%	0	6.0%	7	6.7%	8	7.2%	6	2.3%	1	3.2%	2	4.1%	1	0.0%	0
Good charity shops	0.3%	2	1.2%	1	0.0%	0	0.9%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good festivals / events	1.0%	6	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Good recreational areas for the family	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Marks & Spencer store	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nice seafront / beach	4.9%	31	4.0%	3	3.7%	2	0.7%	0	3.2%	4	1.5%	2	6.1%	5	7.8%	4	2.5%	1	35.5%	10	1.9%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know)	1.7%	11	2.0%	1	0.9%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	13.7%	7	1.1%	1	2.7%	1	0.0%	0
(Nothing / very little)	6.9%	44	16.8%	13	13.0%	6	2.0%	1	5.8%	6	4.4%	5	9.2%	8	1.1%	1	7.3%	4	0.0%	0	0.0%	0
Weighted base:		641		76		50		46		111		113		85		50		56		28		27
Sample:		673		48		59		93		98		100		91		58		53		45		28

Q25 What could be improved about Deal that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	0.6%	6	0.0%	0	0.0%	0	3.8%	2	1.6%	2	1.5%	2	0.0%	0	0.0%	0	0.6%	1	0.7%	0	0.0%	0
Better public transport	0.4%	4	0.4%	1	1.9%	2	0.7%	0	0.0%	0	0.5%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets	1.2%	12	0.0%	0	0.0%	0	0.7%	0	1.3%	1	3.2%	4	4.8%	4	1.1%	1	0.6%	1	1.2%	1	0.0%	0
Facilities which would assist you if shopping with children	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2
Free car parking	3.0%	30	1.3%	2	0.0%	0	7.7%	4	4.0%	5	4.1%	5	7.3%	7	2.4%	2	3.1%	3	1.3%	1	1.3%	1
More / better town centre events	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	1.9%	19	0.0%	0	0.5%	0	0.0%	0	2.8%	3	8.9%	10	2.3%	2	0.6%	1	2.4%	3	0.0%	0	0.0%	0
More / better value or affordable shops	0.4%	4	0.5%	1	0.0%	0	0.7%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
More / better entertainment	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better places for eating out (e.g. cafes and restaurants)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.5%	1	1.3%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better food shops	1.1%	11	0.0%	0	0.5%	0	0.8%	0	0.0%	0	5.5%	6	0.9%	1	3.1%	3	0.0%	0	0.0%	0	0.0%	0
More / better parking	5.4%	54	2.4%	4	0.0%	0	8.2%	4	12.7%	15	4.8%	5	10.2%	9	5.6%	5	3.0%	3	5.2%	3	5.6%	5
More / better pedestrianised streets	0.6%	6	0.0%	0	0.0%	0	1.8%	1	2.8%	3	1.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
More / better public conveniences	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	0	0.0%	0
More / better seats / flower displays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More advertising	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	7.7%	77	11.5%	21	8.6%	8	15.2%	8	9.8%	11	6.3%	7	14.0%	13	6.4%	6	0.7%	1	0.0%	0	2.4%	2
More independent shops	3.7%	37	4.9%	9	3.0%	3	2.8%	1	6.4%	7	6.0%	7	5.3%	5	4.5%	4	0.0%	0	1.3%	1	0.0%	0
Street markets - physical improvements	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A cinema	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A sandy beach	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi store	0.8%	8	0.0%	0	1.2%	1	0.0%	0	0.0%	0	5.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
An ice cream parlour	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Better security / more police	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better street lighting	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bigger Sainsbury's store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve the pier	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Less cafes	0.6%	6	0.0%	0	0.0%	0	1.5%	1	0.5%	1	2.2%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity shops	1.4%	14	0.0%	0	0.5%	0	2.0%	1	5.2%	6	3.2%	4	2.6%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Less crowded / busy	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less restaurants	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Lower business rates	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower the speed limit to 20 mph	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better parks	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More activities for young people	0.2%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More information about the markets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
More pedestrian crossings	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Stop building new houses	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Swimming Pool	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Use the old Regent Bingo Hall for something	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Viable slipway allowing access to the water	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wider roads	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	16.5%	165	38.0%	70	11.5%	11	5.4%	3	0.0%	0	2.1%	2	8.5%	8	17.6%	16	14.4%	16	19.5%	12	30.5%	27
(Nothing)	59.0%	591	46.3%	86	75.3%	73	56.3%	28	61.2%	70	47.6%	54	51.2%	47	63.7%	58	74.6%	81	70.0%	43	57.9%	51
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Meanscore: [Number of visits per week]

Q26 How often do you or your household visit Sandwich for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	1.9%	19	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.5%	1	12.6%	12	3.1%	3	0.0%	0	0.0%	0	0.0%	0
4-6 days a week	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.9%	6	7.3%	7	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	7	16.3%	15	5.6%	5	0.7%	1	0.0%	0	0.0%	0
One day a week	4.3%	43	3.5%	6	0.5%	0	1.3%	1	0.0%	0	0.6%	1	26.6%	25	8.3%	7	1.9%	2	1.2%	1	0.0%	0
Every two weeks	2.0%	20	0.0%	0	0.0%	0	3.4%	2	1.6%	2	3.5%	4	2.0%	2	3.5%	3	4.8%	5	4.2%	3	0.0%	0
Monthly	3.9%	39	0.0%	0	2.9%	3	2.1%	1	6.5%	7	5.4%	6	10.6%	10	4.2%	4	2.6%	3	7.0%	4	0.7%	1
Once every two months	3.5%	35	0.0%	0	3.3%	3	5.7%	3	12.3%	14	4.2%	5	1.9%	2	5.5%	5	0.6%	1	3.5%	2	1.3%	1
Three-four times a year	6.5%	65	3.6%	7	6.0%	6	12.9%	6	8.1%	9	10.8%	12	9.3%	9	4.9%	4	1.8%	2	11.7%	7	2.7%	2
Once a year	3.1%	31	4.2%	8	0.6%	1	7.0%	3	3.2%	4	2.0%	2	0.0%	0	3.5%	3	3.5%	4	6.3%	4	3.0%	3
Less often	3.5%	35	7.2%	13	4.1%	4	3.1%	2	5.8%	7	1.1%	1	0.0%	0	1.8%	2	0.7%	1	3.8%	2	4.1%	4
Never	65.5%	656	81.2%	150	76.7%	75	63.8%	32	59.3%	68	61.8%	70	11.4%	11	52.4%	47	82.8%	90	61.6%	38	85.8%	76
(Don’t know)	0.7%	7	0.4%	1	0.5%	0	0.7%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0	2.4%	2
(Varies)	0.9%	9	0.0%	0	1.4%	1	0.0%	0	3.3%	4	0.6%	1	2.6%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Mean:		*0.35*		*0.04*		*0.32*		*0.06*		*0.05*		*0.29*		*2.00*		*0.85*		*0.07*		*0.07*		*0.01*
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q27 What do you like about Sandwich? [MR]
Those who visit Sandwich for shopping and other town centre uses at Q26

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	44.2%	153	19.4%	7	70.4%	16	71.1%	13	68.1%	32	51.1%	22	30.4%	25	24.0%	10	57.7%	11	39.9%	9	61.9%	8
Close to friends or relatives	1.1%	4	0.0%	0	2.0%	0	0.0%	0	1.3%	1	1.4%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to home	12.8%	44	0.0%	0	17.6%	4	0.0%	0	0.0%	0	1.7%	1	34.5%	28	24.5%	11	0.0%	0	3.2%	1	0.0%	0
Close to work	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	1.0%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Compact	6.1%	21	0.0%	0	2.5%	1	3.6%	1	12.7%	6	9.7%	4	10.7%	9	0.0%	0	0.0%	0	3.8%	1	0.0%	0
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	1.5%	5	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	3.4%	3	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Easy to park	1.7%	6	0.0%	0	0.0%	0	0.0%	0	2.8%	1	1.4%	1	1.8%	1	4.5%	2	0.0%	0	0.0%	0	5.0%	1
Good facilities in general	2.6%	9	0.0%	0	2.0%	0	0.0%	0	2.3%	1	0.0%	0	2.6%	2	9.0%	4	0.0%	0	6.3%	1	0.0%	0
Good food stores	2.1%	7	0.0%	0	2.0%	0	0.0%	0	0.0%	0	5.6%	2	0.0%	0	8.2%	4	0.0%	0	3.2%	1	0.0%	0
Good pubs, cafés or restaurants	10.2%	35	0.0%	0	2.0%	0	17.5%	3	12.5%	6	12.1%	5	6.5%	5	6.6%	3	38.1%	7	9.1%	2	24.1%	3
Good range of non-food shops	4.4%	15	0.0%	0	4.5%	1	1.8%	0	0.0%	0	0.0%	0	7.4%	6	8.7%	4	0.0%	0	14.4%	3	4.1%	1
Good range of independent shops	15.5%	54	11.3%	4	7.0%	2	15.6%	3	9.6%	4	22.7%	10	13.1%	11	16.9%	7	17.3%	3	19.6%	5	40.6%	5
Good range of 'high street' retailers/ multiples	1.4%	5	0.0%	0	0.0%	0	1.8%	0	1.3%	1	0.0%	0	4.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affordable shops	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
High quality shops	0.7%	2	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.7%	0	4.1%	1
The street markets	2.7%	9	3.9%	1	2.0%	0	1.8%	0	0.0%	0	2.5%	1	2.1%	2	2.6%	1	7.6%	1	8.1%	2	0.0%	0
Makes a change from other places	0.3%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quiet	9.4%	32	25.0%	9	5.8%	1	5.4%	1	15.5%	7	13.3%	6	6.4%	5	2.9%	1	0.0%	0	4.9%	1	5.0%	1
Safe and secure	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Traditional	16.2%	56	36.5%	13	26.6%	6	20.7%	4	6.2%	3	34.3%	15	3.2%	3	9.5%	4	9.7%	2	19.3%	5	21.5%	3
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clean	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op store	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Familiar / know where everything is	0.1%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Friendly people / good atmosphere	2.4%	8	0.0%	0	2.5%	1	0.0%	0	0.0%	0	12.0%	5	0.5%	0	1.6%	1	3.4%	1	1.7%	0	4.1%	1
Good charity shops	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0
Good cinema	0.3%	1	0.0%	0	0.0%	0	1.8%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good festivals / events	2.2%	8	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	5.7%	5	1.3%	1	6.3%	1	1.7%	0	0.0%	0
(Dont know)	4.3%	15	8.6%	3	6.5%	1	5.5%	1	1.3%	1	5.6%	2	0.0%	0	6.1%	3	0.0%	0	7.0%	2	16.6%	2
(Nothing / very little)	6.6%	23	11.3%	4	5.8%	1	1.8%	0	9.6%	4	2.8%	1	8.9%	7	7.6%	3	4.2%	1	1.7%	0	0.0%	0
Weighted base:		345		35		23		18		47		43		82		43		19		23		13
Sample:		375		20		27		44		37		42		81		50		17		41		16

Dover Household Survey
For Carter Jonas

Q28 What could be improved about Sandwich that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	1.2%	12	0.0%	0	1.5%	1	3.3%	2	0.0%	0	0.6%	1	5.1%	5	0.8%	1	0.7%	1	2.0%	1	1.3%	1
Better public transport	0.3%	3	0.4%	1	0.0%	0	0.7%	0	0.0%	0	0.5%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Cleaner streets	0.6%	6	0.0%	0	4.1%	4	0.0%	0	0.6%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Facilities which would assist you if shopping with children	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Free car parking	2.2%	22	0.7%	1	1.1%	1	0.0%	0	1.2%	1	1.0%	1	11.6%	11	3.1%	3	2.0%	2	1.6%	1	0.0%	0
More / better town centre events	0.6%	6	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	5	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	0.8%	8	0.0%	0	4.1%	4	0.0%	0	0.6%	1	0.0%	0	0.6%	1	0.0%	0	2.4%	3	0.0%	0	0.0%	0
More / better value or affordable shops	0.5%	5	0.5%	1	0.0%	0	0.0%	0	1.0%	1	1.5%	2	0.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
More / better entertainment	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better places for eating out (e.g. cafes and restaurants)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better food shops	1.1%	11	0.0%	0	4.1%	4	0.0%	0	1.0%	1	0.0%	0	3.3%	3	3.1%	3	0.0%	0	0.7%	0	0.0%	0
More / better parking	4.6%	46	0.0%	0	0.0%	0	11.6%	6	8.6%	10	5.2%	6	9.9%	9	11.3%	10	0.0%	0	2.5%	2	3.6%	3
More / better pedestrianised streets	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
More / better seats / flower displays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More advertising	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	2.9%	29	0.9%	2	2.4%	2	1.6%	1	0.0%	0	3.7%	4	13.0%	12	6.1%	6	0.0%	0	3.1%	2	1.1%	1
More independent shops	1.5%	15	1.0%	2	0.9%	1	0.8%	0	0.5%	1	2.0%	2	2.2%	2	4.7%	4	0.0%	0	3.8%	2	1.1%	1
Street markets - physical improvements	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Protection from the weather (ie. covered shopping malls)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Improved pavements	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less cafes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Less charity shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Less empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion	0.3%	3	0.0%	0	0.0%	0	0.7%	0	0.5%	1	0.5%	1	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Make the town centre more spread out	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More banks	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park and ride facilities	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	24.2%	243	45.6%	84	19.5%	19	24.5%	12	7.6%	9	14.4%	16	8.0%	7	16.8%	15	28.2%	31	23.5%	14	39.1%	35
(Nothing)	61.1%	612	51.4%	95	71.5%	70	53.5%	27	78.7%	90	70.8%	80	46.0%	43	53.6%	48	65.9%	71	62.8%	38	55.5%	49
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Q29 Do you or your household visit the following leisure attractions? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bingo / casino / bookmaker	7.2%	72	13.9%	26	10.4%	10	1.3%	1	5.7%	6	6.2%	7	11.1%	10	6.9%	6	3.6%	4	0.0%	0	2.0%	2
Cinema	53.8%	539	62.7%	116	52.4%	51	55.7%	28	49.8%	57	55.8%	63	58.0%	54	37.3%	34	55.5%	60	46.9%	29	53.5%	47
Gym / health club / sports facility	15.5%	155	17.3%	32	18.0%	18	24.3%	12	12.1%	14	15.7%	18	11.8%	11	10.3%	9	13.1%	14	15.8%	10	19.5%	17
Theatre / concert / music venue	28.8%	288	13.6%	25	33.8%	33	45.5%	23	31.3%	36	29.0%	33	17.3%	16	44.9%	41	29.0%	31	46.3%	28	25.4%	22
Museum / gallery or place of historical / cultural interest	20.9%	209	12.1%	22	26.7%	26	32.7%	16	27.4%	31	22.9%	26	21.4%	20	18.7%	17	11.2%	12	33.1%	20	20.1%	18
Pub / bar / nightclub	41.2%	413	36.9%	68	24.5%	24	46.3%	23	40.0%	46	60.4%	69	45.0%	42	36.5%	33	43.0%	47	51.3%	31	34.8%	31
Restaurant / café	61.2%	613	59.4%	110	71.0%	69	61.5%	31	63.2%	72	71.7%	81	51.3%	47	57.7%	52	55.9%	61	69.7%	42	52.9%	47
Family entertainment (e.g. tenpin bowling, skating rink)	16.8%	168	20.4%	38	20.3%	20	23.9%	12	21.1%	24	30.0%	34	8.9%	8	18.2%	16	0.0%	0	6.6%	4	12.9%	11
Other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't visit ANY leisure activities)	14.8%	149	9.5%	18	15.4%	15	11.3%	6	15.2%	17	14.0%	16	21.0%	19	17.9%	16	17.9%	19	13.4%	8	15.6%	14
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

Meanscore: [Number of visits per month]

Q30 How often do you or your household play bingo or visit casinos or bookmakers?
Those who visit bingo / casino / bookmakers at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	10.4%	7	27.8%	7	0.0%	0	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	4.4%	3	0.0%	0	0.0%	0	0.0%	0	9.2%	1	0.0%	0	12.4%	1	0.0%	0	32.9%	1	0.0%	0	0.0%	0
Once a fortnight	4.4%	3	3.5%	1	5.6%	1	0.0%	0	0.0%	0	8.6%	1	0.0%	0	18.0%	1	0.0%	0	0.0%	0	0.0%	0
Once a month	27.2%	20	32.0%	8	39.4%	4	0.0%	0	0.0%	0	8.6%	1	22.2%	2	54.5%	3	0.0%	0	0.0%	0	64.4%	1
Once every two months	29.8%	22	36.6%	9	44.9%	5	50.0%	0	0.0%	0	8.6%	1	23.2%	2	16.5%	1	67.1%	3	0.0%	0	35.5%	1
Once every six months	22.5%	16	0.0%	0	5.6%	1	0.0%	0	90.8%	6	74.3%	5	37.9%	4	11.0%	1	0.0%	0	0.0%	0	0.0%	0
Once a year or less	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	1.3%	1	0.0%	0	4.5%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.37*		*2.24*		*0.78*		*3.25*		*0.55*		*0.45*		*0.95*		*1.01*		*1.65*		*0.00*		*0.82*
Weighted base:		72		26		10		1		6		7		10		6		4		0		2
Sample:		44		8		6		2		3		4		8		7		3		0		3

Q31 Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?
Those who visit bingo / casino / bookmakers at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford - Mecca	0.6%	0	0.0%	0	4.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Regent Bingo & Social Club	1.9%	1	0.0%	0	0.0%	0	50.0%	0	0.0%	0	8.6%	1	4.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Gala Bingo	25.1%	18	56.3%	14	16.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.9%	1	0.0%	0	35.5%	1
Margate - Beacon Bingo	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood Cross - Grosvenor Casino	17.6%	13	24.9%	6	0.0%	0	0.0%	0	79.6%	5	0.0%	0	0.0%	0	18.0%	1	0.0%	0	0.0%	0	0.0%	0
Westwood Cross - Mecca	50.5%	36	18.8%	5	78.7%	8	0.0%	0	20.4%	1	91.4%	6	73.5%	8	82.0%	5	67.1%	3	0.0%	0	35.5%	1
Alkham Village Centre	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arpinge Village Centre	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.9%	1
Cheriton Village Centre	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal Town Centre	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	0.5%	0	0.0%	0	0.0%	0	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		72		26		10		1		6		7		10		6		4		0		2
Sample:		44		8		6		2		3		4		8		7		3		0		3

Meanscore: [Number of visits per month]

Q32 How often do you or your household go to the cinema?
Those who visit the cinema at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.3%	2	0.8%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	3.3%	18	9.7%	11	0.0%	0	5.5%	2	1.9%	1	0.9%	1	2.7%	1	0.0%	0	1.9%	1	0.0%	0	1.1%	1
Once a fortnight	14.1%	76	17.5%	20	17.9%	9	23.8%	7	16.9%	10	13.2%	8	17.6%	9	2.0%	1	3.9%	2	7.8%	2	15.1%	7
Once a month	33.8%	182	40.6%	47	37.0%	19	13.1%	4	39.0%	22	23.7%	15	36.9%	20	17.0%	6	39.2%	24	29.9%	9	37.4%	18
Once every two months	23.5%	127	9.8%	11	22.1%	11	40.2%	11	24.0%	14	27.4%	17	22.1%	12	24.7%	8	34.4%	21	38.6%	11	20.6%	10
Once every six months	16.3%	88	5.9%	7	16.2%	8	14.2%	4	13.2%	8	27.6%	17	14.7%	8	33.4%	11	14.4%	9	18.3%	5	22.7%	11
Once a year or less	4.9%	26	12.1%	14	1.1%	1	3.3%	1	2.3%	1	0.9%	1	1.0%	1	18.1%	6	0.0%	0	4.0%	1	2.0%	1
(Dont know / varies)	3.8%	21	3.6%	4	5.7%	3	0.0%	0	1.3%	1	6.1%	4	4.9%	3	4.8%	2	6.3%	4	1.4%	0	1.1%	1
Mean:		*0.96*		*1.31*		*0.92*		*1.06*		*1.05*		*0.78*		*1.02*		*0.44*		*0.80*		*0.70*		*0.88*
Weighted base:		539		116		51		28		57		63		54		34		60		29		47
Sample:		441		57		37		44		43		47		47		32		50		40		44

Q33 Where do you or members of your household normally go to the cinema?
Those who visit the cinema at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford - Cineworld Cinema, Eureka Entertainment Centre	24.5%	130	47.3%	53	16.1%	8	18.7%	5	12.9%	7	2.7%	2	0.8%	0	1.7%	1	23.7%	14	7.0%	2	81.9%	37
Canterbury - Curzon	2.2%	12	0.0%	0	1.1%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	4.3%	3	20.3%	5	3.2%	1
Canterbury - Gulbenkian, University of Kent	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	10.2%	3	0.0%	0
Canterbury - Odeon Cinema	2.6%	14	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	1	5.2%	3	29.4%	8	1.1%	1
Dover - Silver Screen Cinema	14.3%	76	34.2%	38	43.3%	22	15.9%	4	1.3%	1	1.2%	1	0.0%	0	0.0%	0	15.0%	9	0.0%	0	1.4%	1
Folkestone - Silver Screen Cinema	0.6%	3	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	5.0%	2
Ramsgate - Granville Cinema	0.9%	5	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Sandwich - Empire Cinema	8.8%	46	0.0%	0	0.0%	0	6.9%	2	6.6%	4	13.3%	8	37.8%	20	22.3%	7	1.9%	1	14.0%	4	0.0%	0
Westwood Cross - Vue Cinemas	43.0%	227	15.0%	17	38.3%	20	51.4%	14	73.0%	42	80.7%	51	53.1%	28	60.3%	19	46.0%	28	19.1%	5	7.3%	3
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hawkhurst - Kino	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Royal Tunbridge Wells - Odeon Cinema	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westgate-on-Sea - Carlton Cinema	2.1%	11	0.0%	0	0.0%	0	1.4%	0	6.2%	4	1.2%	1	8.3%	4	4.3%	1	1.3%	1	0.0%	0	0.0%	0
Weighted base:		529		111		51		28		57		63		54		32		60		27		46
Sample:		433		55		37		44		43		47		47		30		50		39		41

Meanscore: [Number of visits per month]

Q34 How often do you or your household use a gym / healthclub / sports facility?
Those who go to the gym / healthclub / sports facilities at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	68.7%	106	58.3%	19	65.4%	11	65.7%	8	81.6%	11	92.5%	16	57.0%	6	51.6%	5	79.1%	11	54.3%	5	74.7%	13
Once a week	20.9%	32	32.3%	10	18.1%	3	24.5%	3	13.1%	2	7.5%	1	30.3%	3	36.4%	3	9.9%	1	36.3%	3	6.6%	1
Once a fortnight	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	1	6.0%	1	0.0%	0	5.1%	0	0.0%	0
Once a month	4.1%	6	9.4%	3	2.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	1	0.0%	0	12.1%	2
Once every two months	2.7%	4	0.0%	0	3.2%	1	9.8%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	1	5.5%	1	0.0%	0	6.6%	1
Once every six months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year or less	1.2%	2	0.0%	0	10.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	1.1%	2	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	5.1%	1	0.0%	0	0.0%	0	4.2%	0	0.0%	0
Mean:		*5.10*		*4.89*		*4.70*		*4.97*		*5.72*		*5.85*		*5.04*		*4.70*		*5.23*		*5.03*		*4.90*
Weighted base:		155		32		18		12		14		18		11		9		14		10		17
Sample:		138		17		13		21		10		13		13		10		13		17		11

Q35 Where do you or members of your household normally go to use a gym / healthclub / sports facility?
Those who go to the gym / healthclub / sports facilities at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford - Ashford International Hotel	0.7%	1	0.0%	0	0.0%	0	0.0%	0	7.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aylesham - Aylesham Welfare Leisure Centre	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	1	0.0%	0	13.0%	1	0.0%	0
Bannatyne Health Club & SPA, Unit 2, Lower Terrace, Eureka Leisure Park, Ashford TN25 4BN	1.7%	2	0.0%	0	0.0%	0	3.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	2
Broadstairs - Bannatyne Health Club	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Broadstairs - DW Fitness	0.5%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury - DW Fitness, Maybrook Retail Park	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	22.4%	2	0.0%	0
Canterbury - Fit4less	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	1	5.5%	1	0.0%	0	0.0%	0
Canterbury - King's Recreation Centre,	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	1	0.0%	0	14.8%	1	0.0%	0
Canterbury - Kingsmead Leisure Centre	4.8%	7	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.4%	3	0.0%	0	36.9%	3	0.0%	0
Deal - The Body Works Gym	1.9%	3	0.0%	0	0.0%	0	3.4%	0	5.3%	1	10.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Tides Swimming Centre	10.3%	15	0.0%	0	0.0%	0	5.5%	1	72.0%	10	6.7%	1	15.9%	2	6.0%	1	8.2%	1	0.0%	0	0.0%	0
Dover - Dover Leisure Centre	13.7%	20	29.5%	9	37.8%	6	18.4%	2	5.3%	1	0.0%	0	0.0%	0	0.0%	0	12.7%	2	0.0%	0	3.8%	1
Dover - Dover Marina Hotel & SPA	0.9%	1	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0
Dover - Hourglass Fitness Club	4.3%	6	5.8%	2	12.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.2%	3	0.0%	0	0.0%	0
Dover - The Weights Room	7.4%	11	30.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	1	0.0%	0	0.0%	0
Folkestone - Folkestone Sports Centre	4.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.3%	7
Folkestone - Spindles Health & Leisure Club	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Sandwich - Sandwich Leisure Centre	7.3%	11	0.0%	0	26.9%	4	0.0%	0	0.0%	0	0.0%	0	52.4%	5	0.0%	0	5.5%	1	0.0%	0	3.8%	1
Sandwich - The Fitness Connection	5.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	6	27.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Margaret's at Cliffe - Balance SPA & Health Club (Dover)	15.2%	22	12.1%	4	18.8%	3	63.8%	8	0.0%	0	18.6%	3	0.0%	0	0.0%	0	5.5%	1	0.0%	0	26.8%	4
Ashford - Bannatyne Health Club & Spa	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0
Ashford - Eastwell Manor a Champneys Spa Hotel	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	1	0.0%	0

Dover Household Survey
For Carter Jonas

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Canterbury - Active Lives	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	0	0.0%	0
Deal - Betteshanger Park	2.3%	3	9.7%	3	0.0%	0	2.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Betteshanger Social & Sports Club	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Royal Cinque Ports Golf Club	0.4%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Studio 30 Fitness	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - The Pilates Shed	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	0.0%	0
Deal - Walmer & Kingsdown Golf Club	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deal - Warden House Primary School	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Fightin' Fit Boxing & Fitness Gym	2.0%	3	9.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - St Edmund's Catholic School	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Dover - Town Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	1	0.0%	0	0.0%	0	0.0%	0
Dover - White Cliffs CrossFit	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.2%	3	0.0%	0	0.0%	0
Hawkinge - Hawkinge Community Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Ramsgate - Ramsgate Croquet Club	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0
Sandwich - The Retreat	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sittingbourne - Sittingbourne & Milton Regis Golf Club	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	1	0.0%	0	0.0%	0	0.0%	0
Walmer - Walmer & Kingsdown Golf Club	0.2%	0	0.0%	0	0.0%	0	2.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		147		31		15		12		14		16		10		9		14		9		17
Sample:		128		16		11		20		10		11		12		10		13		15		10

Meanscore: [Number of visits per month]

Q36 How often do you or your household visit a theatre / concert / music venue?
Those who visit the theatre / concert / music venues at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.1%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.6%	2	3.6%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	2.3%	7	5.4%	1	0.0%	0	13.9%	3	0.0%	0	5.1%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Once a month	7.4%	21	0.0%	0	6.7%	2	8.1%	2	18.5%	7	5.6%	2	2.8%	0	4.5%	2	2.0%	1	14.8%	4	7.4%	2
Once every two months	27.8%	80	52.0%	13	30.3%	10	26.4%	6	17.5%	6	26.0%	9	32.5%	5	17.6%	7	28.4%	9	29.0%	8	30.0%	7
Once every six months	40.4%	117	23.4%	6	50.4%	17	33.2%	8	45.8%	16	47.8%	16	47.1%	8	26.1%	11	41.6%	13	42.0%	12	50.5%	11
Once a year or less	18.6%	54	15.6%	4	5.1%	2	13.7%	3	14.5%	5	13.2%	4	12.0%	2	47.9%	19	25.9%	8	11.0%	3	12.1%	3
(Dont know / varies)	2.8%	8	0.0%	0	7.4%	2	3.2%	1	3.7%	1	0.0%	0	5.6%	1	4.0%	2	2.0%	1	1.4%	0	0.0%	0
Mean:		*0.40*		*0.58*		*0.35*		*0.68*		*0.39*		*0.49*		*0.31*		*0.24*		*0.28*		*0.43*		*0.34*
Weighted base:		288		25		33		23		36		33		16		41		31		28		22
Sample:		333		19		32		44		33		37		17		40		30		49		32

Q37 Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?
Those who visit the theatre / concert / music venues at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Canterbury - Canterbury Cathedral	0.9%	2	0.0%	0	2.9%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Canterbury - Gulbenkian Theatre, University of Kent	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	6.3%	2	0.0%	0
Canterbury - The Marlow Theatre	73.0%	196	80.3%	16	73.1%	23	70.5%	16	65.9%	23	53.5%	16	81.2%	13	79.0%	30	75.3%	22	86.0%	22	72.9%	16
Deal - The Astor Theatre	4.4%	12	0.0%	0	0.0%	0	5.6%	1	9.9%	3	17.9%	5	0.0%	0	2.7%	1	2.2%	1	0.0%	0	0.0%	0
Folkestone - Leas Cliff Hall	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	2.9%	1
Folkestone - The Tower Theatre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	2.3%	1
Margate - Theatre Royal	2.9%	8	0.0%	0	5.9%	2	0.0%	0	6.9%	2	11.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate - Winter Gardens	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury City Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	13.2%	35	4.6%	1	16.2%	5	21.2%	5	15.3%	5	10.6%	3	5.3%	1	11.1%	4	19.8%	6	6.1%	2	17.6%	4
Dartford - Orchard Theatre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
London - The O2	0.8%	2	0.0%	0	1.8%	1	0.0%	0	0.0%	0	2.5%	1	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London - Theatre Royal	0.2%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1
Walmer -The Royal Marines Association	0.3%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wembley - Wembley Stadium	1.1%	3	15.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		268		20		32		22		35		30		16		38		29		25		22
Sample:		315		16		30		43		32		35		16		37		29		46		31

Meanscore: [Number of visits per month]

Q38 How often do you or your household go to a museum, gallery, or other place of historical / cultural interest?
Those who visit museum / gallery or place of historical / cultural interest at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Once a week	0.9%	2	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	6.0%	12	17.5%	4	2.2%	1	4.0%	1	2.3%	1	0.0%	0	21.9%	4	4.1%	1	9.6%	1	2.0%	0	0.0%	0
Once a month	9.2%	19	13.4%	3	3.2%	1	5.6%	1	13.8%	4	0.0%	0	7.0%	1	10.3%	2	0.0%	0	18.7%	4	18.1%	3
Once every two months	23.9%	50	14.7%	3	35.0%	9	30.5%	5	24.6%	8	30.4%	8	26.2%	5	18.8%	3	16.1%	2	23.8%	5	9.9%	2
Once every six months	29.6%	62	19.5%	4	25.5%	7	35.7%	6	31.2%	10	44.3%	12	20.4%	4	7.4%	1	63.7%	8	32.8%	7	22.3%	4
Once a year or less	24.2%	50	34.9%	8	22.5%	6	18.5%	3	22.3%	7	16.4%	4	20.3%	4	43.8%	7	5.3%	1	18.3%	4	38.0%	7
(Dont know / varies)	6.1%	13	0.0%	0	11.5%	3	0.0%	0	5.8%	2	8.8%	2	4.2%	1	9.5%	2	5.3%	1	2.5%	0	11.7%	2
Mean:		*0.49*		*0.63*		*0.37*		*0.60*		*0.42*		*0.28*		*0.73*		*0.64*		*0.43*		*0.56*		*0.36*
Weighted base:		209		22		26		16		31		26		20		17		12		20		18
Sample:		209		13		18		29		23		24		18		18		13		34		19

Q39 Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest?
Those who visit museum / gallery or place of historical / cultural interest at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Canterbury - Canterbury Cathedral	1.0%	2	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0
Canterbury - Canterbury Heritage Museum	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Canterbury - Sidney Cooper Gallery	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury - The Beaney	5.6%	9	0.0%	0	2.3%	1	0.0%	0	11.2%	3	0.0%	0	5.8%	1	0.0%	0	7.6%	1	19.1%	3	4.6%	1
Deal - Deal Castle	2.0%	3	0.0%	0	0.0%	0	0.0%	0	4.7%	1	6.0%	1	0.0%	0	0.0%	0	9.4%	1	0.0%	0	0.0%	0
Deal Maritime and local History Museum	1.2%	2	0.0%	0	0.0%	0	5.3%	1	2.6%	1	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Archcliffe Fort	3.5%	6	26.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	3	0.0%	0	0.0%	0
Dover - Dover Castle	6.5%	10	6.5%	1	23.0%	6	0.0%	0	0.0%	0	3.2%	1	9.6%	2	0.0%	0	21.6%	2	0.0%	0	0.0%	0
Dover - Dover Museum and Bronze Age Boat Gallery	6.6%	11	6.5%	1	16.1%	4	2.6%	0	0.0%	0	0.0%	0	22.7%	4	9.4%	1	7.6%	1	0.0%	0	0.0%	0
Dover - Dover Transport Museum	3.2%	5	0.0%	0	2.3%	1	25.4%	3	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	1
Dover - Maison Dieu (Town Hall)	1.9%	3	26.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - White Cliffs of Dover (Heritage Coast)	1.7%	3	0.0%	0	0.0%	0	2.6%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	15.2%	1	0.0%	0	0.0%	0
Folkestone - Elham Valley Railway Museum	3.2%	5	0.0%	0	0.0%	0	0.0%	0	18.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate - Shell Grotto	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1	0.0%	0	0.0%	0	0.0%	0
Margate - Turner Contemporary	6.4%	10	0.0%	0	0.0%	0	40.9%	5	0.0%	0	9.2%	2	0.0%	0	20.9%	2	0.0%	0	4.8%	1	3.8%	1
Sandwich - The Guildhall Museum	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Margarets - St Margarets Musuem	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0
Walmer - Walmer Castle	1.4%	2	0.0%	0	0.0%	0	0.0%	0	6.0%	2	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	0	6.9%	1
Bridge - St Peters Church	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Canterbury - Artique Gallery	0.2%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	43.8%	70	34.3%	4	56.3%	14	15.7%	2	44.6%	13	50.8%	9	53.8%	9	64.6%	7	0.0%	0	40.7%	6	44.7%	6
Deal - Timeball Tower	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	1	0.0%	0	0.0%	0
Deal Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	0.9%	1	0.0%	0	0.0%	0	4.8%	1	0.0%	0	0.0%	0	4.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.4%	2	0.0%	0	0.0%	0	0.0%	0	3.9%	1	6.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maidstone - Leeds Castle	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	2
Lerwick, Shetland	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
London - Natural History Museum	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	1
London - The British Library	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
London - The National Gallery	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	2
London - The Tate Gallery	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0
London - The Wallace Collection	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0
London - V&A Museum	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Weighted base:		160		11		25		12		28		18		17		11		8		15		14
Sample:		152		6		16		20		19		18		14		13		9		25		12

Meanscore: [Number of visits per month]

Q40 How often do you or your household go to pubs / bars / nightclubs?
Those who visit pubs / bars / nightclubs at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	14.7%	61	12.8%	9	7.1%	2	10.3%	2	29.2%	13	11.6%	8	16.4%	7	10.7%	4	9.7%	5	19.6%	6	17.8%	5
Once a week	26.3%	109	21.3%	15	7.8%	2	35.6%	8	33.6%	15	26.9%	18	42.8%	18	14.0%	5	26.9%	13	21.9%	7	27.6%	9
Once a fortnight	23.2%	96	30.6%	21	33.5%	8	35.1%	8	10.1%	5	20.0%	14	12.4%	5	28.9%	10	25.1%	12	13.8%	4	31.0%	10
Once a month	18.6%	77	21.8%	15	23.8%	6	9.4%	2	22.7%	10	21.6%	15	2.6%	1	16.5%	5	18.9%	9	34.2%	11	9.8%	3
Once every two months	9.6%	40	5.7%	4	14.9%	4	9.7%	2	1.6%	1	18.2%	12	19.0%	8	5.1%	2	6.9%	3	9.1%	3	3.7%	1
Once every six months	4.2%	17	6.4%	4	0.0%	0	0.0%	0	1.3%	1	0.0%	0	3.5%	1	21.6%	7	8.1%	4	0.0%	0	0.0%	0
Once a year or less	0.2%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
(Dont know / varies)	3.1%	13	1.3%	1	10.5%	3	0.0%	0	1.6%	1	1.7%	1	3.3%	1	3.2%	1	4.4%	2	0.0%	0	10.1%	3
Mean:		*2.73*		*2.53*		*1.93*		*2.88*		*3.59*		*2.52*		*3.17*		*2.08*		*2.51*		*2.72*		*3.23*
Weighted base:		413		68		24		23		46		69		42		33		47		31		31
Sample:		357		33		27		40		33		49		29		33		35		45		33

Q41 What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to when visiting pubs / bars / nightclubs?
Those who visit pubs / bars / nightclubs at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Canterbury - Dane John Gardens	1.3%	4	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	3	0.0%	0	0.0%	0
Canterbury - Duidstone Park	0.8%	3	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	1	0.0%	0	0.0%	0	0.0%	0
Deal - Betteshanger Park	19.9%	65	2.3%	1	2.2%	0	32.0%	7	71.0%	29	45.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Christmas Ice Rink (Dover Harbour)	0.7%	2	0.0%	0	6.6%	1	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Dover - Goodnestone Park Gardens	0.5%	2	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	1.8%	0	0.0%	0
Dover - Kearsney Abbey	3.5%	11	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.6%	11	0.0%	0	0.0%	0
Dover - Pencester garden	0.3%	1	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Brockhill Country park	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	2
Folkestone - Radnor Park	0.4%	1	0.0%	0	0.0%	0	6.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - The Leas Country Park	0.7%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	1
Folkestone - The Warren	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	3
Sandwich - Secret Garden	7.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	55.2%	21	0.0%	0	3.0%	1	0.0%	0	0.0%	0
St Margarets - The Pines Garden	2.2%	7	0.0%	0	0.0%	0	9.9%	2	12.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	16.0%	52	0.0%	0	11.2%	2	0.0%	0	0.0%	0	9.8%	6	2.9%	1	41.8%	9	9.8%	3	65.2%	18	46.4%	13
Alkham Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Aylesham Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	2	0.0%	0	0.0%	0	0.0%	0
Canterbury City Centre	6.5%	21	7.6%	3	35.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	2	0.0%	0	28.5%	8	4.0%	1
Canterbury - Other	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Capel-le-Ferne Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Deal Town Centre	14.9%	48	7.6%	3	0.0%	0	10.0%	2	7.9%	3	40.4%	24	24.5%	9	2.7%	1	4.4%	1	0.0%	0	15.4%	4
Deal - Other	0.6%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	7.1%	23	36.9%	15	21.1%	4	0.0%	0	0.0%	0	1.2%	1	2.1%	1	0.0%	0	9.3%	2	0.0%	0	0.0%	0
Dover - Other	1.6%	5	11.7%	5	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eythorne Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Folkestone Town Centre	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	3
Kingsdown Village Centre	1.0%	3	0.0%	0	0.0%	0	11.8%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	4.1%	13	16.1%	6	0.0%	0	0.0%	0	1.4%	1	0.0%	0	13.0%	5	5.9%	1	0.0%	0	0.0%	0	0.0%	0
Sandwich - Other	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shepherdswell Village Centre	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	3	0.0%	0	0.0%	0
St. Margaret's-at-Cliffe Village Centre	1.2%	4	0.0%	0	0.0%	0	19.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staple Village Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	2	0.0%	0	0.0%	0	0.0%	0
Stourmouth Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Walmer Town Centre	1.5%	5	9.8%	4	0.0%	0	1.9%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood - Westwood	0.2%	1	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Cross																						
Whitfield Village Centre	1.7%	5	0.0%	0	15.7%	3	0.0%	0	2.7%	1	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Wingham Village Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0	4.5%	1	0.0%	0
Weighted base:		326		40		21		21		41		61		39		21		26		27		29
Sample:		282		19		22		36		27		43		24		25		18		38		30

Meanscore: [Number of visits per month]

Q42 How often do you or your household eat out (e.g. visit cafes and restaurants)?
Those who visit restaurants / cafés at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	7.9%	48	11.3%	12	14.9%	10	12.0%	4	7.7%	6	7.8%	6	7.7%	4	3.0%	2	1.3%	1	4.6%	2	4.4%	2
Once a week	21.2%	130	22.1%	24	7.4%	5	22.3%	7	23.0%	17	22.0%	18	32.1%	15	12.2%	6	21.3%	13	26.6%	11	28.9%	14
Once a fortnight	19.8%	121	20.0%	22	24.6%	17	9.8%	3	20.2%	15	18.7%	15	5.9%	3	17.2%	9	32.6%	20	29.0%	12	12.4%	6
Once a month	25.8%	158	15.3%	17	30.3%	21	30.0%	9	29.6%	21	31.6%	26	25.3%	12	30.0%	16	22.2%	13	18.8%	8	32.5%	15
Once every two months	14.2%	87	19.6%	22	10.8%	7	12.0%	4	8.7%	6	9.5%	8	23.2%	11	17.8%	9	12.8%	8	16.5%	7	11.1%	5
Once every six months	4.2%	26	1.7%	2	9.3%	6	3.7%	1	0.0%	0	2.1%	2	0.9%	0	18.6%	10	2.3%	1	0.0%	0	6.2%	3
Once a year or less	0.3%	2	1.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	6.5%	40	8.8%	10	2.7%	2	10.2%	3	9.8%	7	8.2%	7	4.8%	2	1.1%	1	7.5%	5	4.5%	2	4.5%	2
Mean:		*2.20*		*2.43*		*2.12*		*2.42*		*2.36*		*2.28*		*2.35*		*1.46*		*2.02*		*2.29*		*2.16*
Weighted base:		613		110		69		31		72		81		47		52		61		42		47
Sample:		601		59		60		64		66		70		46		61		59		66		50

Q43 What location (e.g. town centre, shopping centre, retail/ leisure park) do you or members of your household normally go to for eating out (e.g. cafes and restaurants)?
Those who visit restaurants / cafés at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford - AMF Bowling	0.4%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Broadstairs - Revolution Skate Park	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Canterbury - Dane John Gardens	1.7%	8	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.6%	7	0.0%	0	1.4%	1
Canterbury - Duidstone Park	3.0%	13	0.0%	0	2.0%	1	1.6%	0	0.0%	0	0.0%	0	10.9%	4	7.5%	2	3.3%	1	6.2%	2	4.6%	2
Deal - Betteshanger Park	16.0%	70	0.0%	0	2.2%	1	34.4%	8	43.6%	28	38.3%	26	1.3%	0	0.0%	0	15.6%	6	1.1%	0	0.0%	0
Dover - Christmas Ice Rink (Dover Harbour)	0.3%	1	0.0%	0	0.9%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Connaught Park	1.3%	6	7.5%	4	2.0%	1	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Goodnestone Park Gardens	0.7%	3	1.7%	1	0.0%	0	2.6%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Dover - Kearsney Abbey	0.5%	2	1.7%	1	1.7%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Pencester garden	0.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone - Brockhill Country park	0.3%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Folkestone - Radnor Park	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Folkestone - The Leas Country Park	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	3
Hythe - Royal Military Canal	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Margate - Quex Maise Maze	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Sandwich - Secret Garden	4.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	47.4%	17	0.0%	0	6.1%	2	0.0%	0	0.0%	0
St Margarets - The Pines Garden	1.7%	7	0.0%	0	0.0%	0	8.5%	2	8.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	8.5%	37	2.6%	1	4.8%	2	5.4%	1	2.3%	1	1.6%	1	0.0%	0	8.5%	3	6.4%	2	33.0%	12	34.5%	12
Ashford Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Ashford - Other	0.3%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Aylesham Village Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	3	0.0%	0	0.0%	0	0.0%	0
Canterbury City Centre	15.0%	66	3.5%	2	30.0%	15	6.2%	2	4.9%	3	1.1%	1	2.8%	1	44.1%	15	14.2%	5	53.7%	19	7.9%	3
Canterbury - Other	0.6%	3	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	3.1%	1	0.0%	0	0.0%	0
Capel-le-Ferne Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Deal Town Centre	15.0%	66	18.1%	9	1.8%	1	19.0%	5	24.9%	16	44.8%	31	11.0%	4	0.0%	0	0.0%	0	1.4%	0	0.0%	0
Deal - Other	0.5%	2	0.0%	0	0.0%	0	1.6%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover Town Centre	11.4%	50	44.8%	23	29.1%	15	1.3%	0	4.7%	3	4.5%	3	0.0%	0	4.8%	2	10.5%	4	0.0%	0	0.0%	0
Dover - Other	3.4%	15	5.8%	3	5.4%	3	7.3%	2	1.7%	1	0.0%	0	10.9%	4	0.0%	0	6.8%	3	0.0%	0	0.0%	0
Folkestone Town Centre	3.4%	15	3.2%	2	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	28.3%	10
Folkestone - Other	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1
Kingsdown Village Centre	0.1%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nonington Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Sandwich Town Centre	2.8%	12	0.0%	0	0.0%	0	2.9%	1	2.1%	1	0.9%	1	12.0%	4	8.4%	3	3.3%	1	2.3%	1	1.8%	1
Sandwich - Other	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staple Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stodmarsh Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Stourmouth Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Westwood - Westwood Cross	3.6%	16	5.8%	3	12.5%	6	0.0%	0	4.2%	3	4.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Whitfield Village Centre	0.9%	4	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.7%	1	1.7%	1	1.1%	0	0.0%	0
Wingham Village Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	1.4%	1
Weighted base:		438		52		51		25		64		68		36		33		38		36		36
Sample:		447		30		42		55		56		61		27		43		40		54		39

Meanscore: [Number of visits per month]

Q44 How often do you or your household go to family entertainment venues?
Those who partake in family entertainment activities at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.5%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	7.6%	13	0.0%	0	0.0%	0	0.0%	0	21.4%	5	22.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	9.5%	16	35.4%	13	0.0%	0	0.0%	0	0.0%	0	5.0%	2	6.7%	1	0.0%	0	0.0%	0	10.0%	0	0.0%	0
Once a month	13.3%	22	25.0%	9	20.1%	4	6.7%	1	3.0%	1	3.2%	1	64.3%	5	6.2%	1	0.0%	0	0.0%	0	0.0%	0
Once every two months	15.1%	25	16.4%	6	2.8%	1	6.7%	1	17.6%	4	22.4%	8	22.3%	2	0.0%	0	0.0%	0	18.4%	1	29.4%	3
Once every six months	30.7%	52	10.4%	4	74.2%	15	66.6%	8	45.9%	11	24.7%	8	6.7%	1	10.4%	2	0.0%	0	12.3%	0	23.9%	3
Once a year or less	17.8%	30	2.4%	1	2.8%	1	11.7%	1	9.1%	2	17.0%	6	0.0%	0	83.3%	14	0.0%	0	49.2%	2	28.4%	3
(Dont know / varies)	5.4%	9	8.0%	3	0.0%	0	8.3%	1	3.0%	1	5.4%	2	0.0%	0	0.0%	0	0.0%	0	10.0%	0	18.3%	2
Mean:		*0.86*		*1.31*		*0.37*		*0.27*		*1.11*		*1.27*		*0.90*		*0.17*		*0.00*		*0.41*		*0.27*
Weighted base:		168		38		20		12		24		34		8		16		0		4		11
Sample:		97		15		10		14		13		15		6		8		0		7		9

Q45 Where do you or members of your household normally go for family entertainment?
Those who partake in family entertainment activities at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Ashford - Imagine Play Centre	10.1%	11	43.7%	6	0.0%	0	4.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.4%	3
Ashford - Rooting Street Equestrian Centre, Little Chart	1.3%	1	9.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birchington - Nelson Park Riding Centre Ltd	2.8%	3	20.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury - Play Islands	7.4%	8	0.0%	0	0.0%	0	28.3%	3	22.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Wingham Wildlife Park	3.7%	4	0.0%	0	20.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate - Dreamland	1.2%	1	0.0%	0	0.0%	0	13.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate - Ollies Indoor Play Centre	5.4%	6	0.0%	0	0.0%	0	28.3%	3	10.3%	2	0.0%	0	17.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ramsgate - Bumble Beez	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashford - AMF Bowling	11.5%	12	0.0%	0	25.3%	5	8.0%	1	0.0%	0	0.0%	0	0.0%	0	11.9%	1	0.0%	0	66.7%	1	53.6%	4
Canterbury	4.4%	5	0.0%	0	20.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0
Canterbury - Wingham Wildlife Park	2.8%	3	20.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cliftonville	1.0%	1	0.0%	0	0.0%	0	0.0%	0	4.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dover - Christmas Ice Rink (Dover Harbour)	0.4%	0	0.0%	0	0.0%	0	4.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Folkestone	3.7%	4	0.0%	0	20.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gillingham - Silver Blades	0.4%	0	0.0%	0	0.0%	0	4.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hastings	0.8%	1	6.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manchester - Namco Funscape	0.6%	1	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manston - Manston Golf Centre	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate	1.7%	2	0.0%	0	0.0%	0	0.0%	0	7.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate - Bugsy's Ten Pin Bowling	20.5%	22	0.0%	0	9.7%	2	4.0%	0	20.7%	5	39.3%	7	82.8%	3	50.8%	6	0.0%	0	0.0%	0	0.0%	0
Sandwich	4.8%	5	0.0%	0	0.0%	0	0.0%	0	22.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tunbridge Wells - Bowlplex	0.5%	1	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westwood - Westwood Cross	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whitstable	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.6%	2	0.0%	0	0.0%	0	0.0%	0
Whitstable - MFA Bowl	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.7%	2	0.0%	0	0.0%	0	0.0%	0
Whitstable - Seafront	4.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woburn Forest - Centre Parcs	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		108		15		19		10		23		17		3		12		0		2		7
Sample:		62		5		9		10		12		6		3		7		0		3		7

Meanscore: [Number of visits per month]

Q46 How often do you or your household do (OTHER ACTIVITY FROM Q29)?
Those who go to other leisure attractions at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every two months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every six months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year or less	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*		*0.00*
Weighted base:		0		0		0		0		0		0		0		0		0		0		0
Sample:		0		0		0		0		0		0		0		0		0		0		0

Q48 What improvements could be made to the leisure offer in the Dover District Council area that would make you visit / partake in leisure activities more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
A casino	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A swimming pool	12.9%	129	12.7%	23	18.0%	18	13.2%	7	17.3%	20	13.9%	16	14.2%	13	10.4%	9	11.5%	12	5.2%	3	8.5%	8
A theatre	1.5%	15	0.0%	0	6.5%	6	5.1%	3	2.2%	3	0.0%	0	0.0%	0	0.8%	1	1.1%	1	2.4%	1	0.6%	1
A multi-screen cinema	8.6%	86	4.2%	8	9.4%	9	7.2%	4	20.5%	23	20.2%	23	4.4%	4	4.4%	4	3.8%	4	3.4%	2	5.8%	5
An art house cinema	1.0%	10	0.0%	0	0.9%	1	0.0%	0	2.7%	3	3.8%	4	0.0%	0	0.6%	1	0.0%	0	1.2%	1	0.0%	0
Bingo	0.7%	7	3.5%	6	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	3.0%	30	5.5%	10	5.2%	5	1.8%	1	1.3%	1	2.1%	2	1.4%	1	0.8%	1	5.8%	6	2.0%	1	0.7%	1
Improved access by foot and cycle	0.4%	4	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.7%	1	1.2%	1	0.6%	1
Improved public transport	0.8%	8	0.4%	1	0.0%	0	6.3%	3	0.6%	1	1.7%	2	1.0%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Improved security / CCTV	0.5%	5	1.6%	3	0.5%	0	0.7%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Improved street furniture	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Improvements in the built environment	1.3%	13	0.4%	1	4.7%	5	1.5%	1	1.0%	1	1.1%	1	0.5%	0	1.4%	1	2.2%	2	0.0%	0	0.6%	1
More / better car parking	2.4%	24	2.9%	5	3.8%	4	4.0%	2	0.0%	0	0.0%	0	1.0%	1	1.1%	1	8.8%	10	3.1%	2	0.0%	0
More / better cultural facilities	1.5%	15	4.9%	9	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.5%	0	1.1%	1	3.1%	3	0.0%	0	0.0%	0
More / better disabled access	0.5%	5	0.9%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.2%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0
More / better health clubs / gyms	2.7%	27	6.3%	12	1.1%	1	2.8%	1	7.3%	8	0.6%	1	0.0%	0	1.5%	1	2.4%	3	0.0%	0	0.0%	0
More / better policing	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public houses	0.4%	4	0.5%	1	0.9%	1	0.0%	0	0.0%	0	0.6%	1	0.9%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
More / better seats	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better signposting and information	1.8%	18	1.6%	3	2.9%	3	0.0%	0	5.5%	6	0.6%	1	0.0%	0	1.5%	1	0.6%	1	3.9%	2	0.7%	1
More better parks / green spaces	0.9%	9	0.5%	1	5.5%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.6%	1	1.4%	2	0.0%	0	0.0%	0
More for children	9.6%	96	20.0%	37	14.6%	14	7.6%	4	2.4%	3	7.4%	8	4.4%	4	4.1%	4	16.5%	18	0.8%	0	4.1%	4
More local sports & recreation facilities	4.8%	49	11.9%	22	15.0%	15	3.6%	2	0.6%	1	2.1%	2	1.2%	1	1.4%	1	1.8%	2	0.7%	0	2.4%	2
More nightclubs	0.3%	3	0.5%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
More pavement cafes	0.8%	8	4.0%	7	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
More quality restaurants	1.8%	18	2.7%	5	0.9%	1	2.3%	1	0.0%	0	0.6%	1	0.5%	0	0.8%	1	7.8%	8	0.7%	0	0.7%	1
More street cleaning	0.6%	6	0.4%	1	1.5%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.4%	1	0.7%	1
Provision of public toilets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Ten-pin bowling	7.9%	79	15.7%	29	3.7%	4	13.8%	7	8.6%	10	9.8%	11	6.0%	6	0.0%	0	7.5%	8	0.0%	0	5.9%	5
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A mini / crazy golf course	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.1%	2	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A skatepark	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A sports / leisure centre	2.5%	25	2.1%	4	2.5%	2	4.5%	2	4.0%	5	0.0%	0	0.0%	0	0.0%	0	11.3%	12	0.0%	0	0.0%	0
A velodrome	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
An ice rink	1.0%	10	0.0%	0	0.5%	0	0.7%	0	2.8%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0	2.7%	2	1.8%	2
An outdoor gym	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Develop the seafront / beach area more	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	1	0.6%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Free parking at leisure facilities	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.5%	0	0.0%	0	0.7%	1	0.0%	0	2.4%	2
Improve the current sports / leisure centre facilities in the area	2.8%	28	7.7%	14	4.7%	5	0.8%	0	0.6%	1	0.0%	0	2.0%	2	3.3%	3	3.1%	3	0.0%	0	0.0%	0
Improved access by road	0.2%	2	0.0%	0	0.5%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.7%	1
More beach cafes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More dog-friendly beaches	0.2%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
More festivals / outdoor events	0.4%	4	0.4%	1	2.5%	2	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More for older people	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
More for teenagers	1.1%	11	4.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3
More live music venues	0.6%	6	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	1.2%	1	0.0%	0
More motorsport events	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
More watersports	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do leisure activities)	4.7%	47	4.5%	8	4.5%	4	0.7%	0	2.7%	3	3.1%	3	8.8%	8	7.8%	7	5.2%	6	7.4%	4	2.8%	2
(Don’t know)	10.9%	109	8.9%	16	4.0%	4	7.9%	4	11.4%	13	1.7%	2	22.8%	21	20.3%	18	10.5%	11	12.4%	8	12.5%	11
(Nothing)	34.4%	344	22.0%	41	26.9%	26	36.1%	18	30.3%	35	43.1%	49	33.1%	31	43.2%	39	24.6%	27	52.8%	32	52.9%	47
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

GEN Gender of respondent:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Male	33.3%	333	30.0%	55	24.7%	24	39.2%	20	30.0%	34	36.6%	41	35.9%	33	38.2%	34	43.4%	47	29.0%	18	28.8%	26
Female	66.7%	668	70.0%	129	75.3%	74	60.8%	30	70.0%	80	63.4%	72	64.1%	59	61.8%	56	56.6%	61	71.0%	43	71.2%	63
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

AGE Can I ask how old you are please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
18-24	5.1%	51	3.5%	6	8.2%	8	0.0%	0	0.0%	0	4.6%	5	16.8%	16	5.4%	5	0.0%	0	11.5%	7	5.0%	4
25-34	17.8%	178	31.2%	58	20.4%	20	17.0%	8	22.6%	26	18.3%	21	16.8%	16	10.8%	10	10.2%	11	0.0%	0	10.1%	9
35-44	21.2%	212	29.3%	54	24.9%	24	8.0%	4	23.3%	27	19.3%	22	13.8%	13	12.6%	11	28.6%	31	8.1%	5	23.6%	21
45-54	18.4%	184	20.6%	38	15.1%	15	16.0%	8	25.6%	29	14.9%	17	17.3%	16	14.5%	13	26.0%	28	8.1%	5	17.1%	15
55-64	13.8%	138	7.3%	14	7.8%	8	22.7%	11	10.5%	12	19.3%	22	10.7%	10	21.6%	20	11.8%	13	27.9%	17	13.8%	12
65+	21.0%	210	8.0%	15	18.4%	18	35.2%	18	16.1%	18	22.6%	26	17.4%	16	31.6%	29	22.3%	24	37.0%	23	27.2%	24
(Refused)	2.7%	27	0.0%	0	5.3%	5	1.2%	1	1.9%	2	1.0%	1	7.2%	7	3.5%	3	1.1%	1	7.4%	4	3.2%	3
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

CAR How many cars does your household own or have the use of?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	10.8%	108	24.2%	45	9.9%	10	5.8%	3	5.0%	6	14.5%	16	4.3%	4	12.5%	11	2.0%	2	4.6%	3	9.7%	9
One	35.5%	355	33.6%	62	50.8%	50	42.4%	21	38.1%	44	33.5%	38	26.2%	24	38.5%	35	29.1%	31	35.2%	21	32.6%	29
Two	38.1%	381	30.9%	57	25.5%	25	38.0%	19	37.6%	43	39.3%	45	39.2%	36	40.7%	37	58.0%	63	35.4%	22	39.8%	35
Three or more	12.1%	121	5.7%	11	12.0%	12	11.9%	6	13.8%	16	11.7%	13	25.2%	23	6.1%	5	9.8%	11	17.2%	10	15.7%	14
(Refused)	3.5%	35	5.5%	10	1.8%	2	1.8%	1	5.5%	6	1.0%	1	5.1%	5	2.3%	2	1.1%	1	7.6%	5	2.2%	2
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

EMP Which of the following best describes the chief wage earner of your household's current employment situation? [PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Working full time	51.1%	512	53.8%	99	52.1%	51	38.9%	19	57.5%	66	53.8%	61	58.8%	54	45.2%	41	57.5%	62	33.0%	20	42.3%	37
Working part time	10.4%	104	16.7%	31	5.3%	5	7.4%	4	9.3%	11	1.2%	1	8.6%	8	12.0%	11	13.4%	14	12.4%	8	12.8%	11
Unemployed	2.4%	24	4.4%	8	1.9%	2	1.2%	1	3.7%	4	5.5%	6	0.0%	0	1.1%	1	2.2%	2	0.0%	0	0.0%	0
Retired	23.7%	237	6.3%	12	24.5%	24	40.3%	20	19.6%	22	29.8%	34	22.3%	21	35.3%	32	22.8%	25	41.5%	25	26.0%	23
A housewife	0.8%	8	3.5%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A student	0.5%	5	0.5%	1	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Self employed	3.5%	35	1.2%	2	0.6%	1	4.3%	2	3.4%	4	2.6%	3	2.6%	2	3.4%	3	0.0%	0	8.2%	5	14.0%	12
Sick / disabled	2.0%	20	6.5%	12	3.8%	4	1.2%	1	0.0%	0	0.6%	1	0.9%	1	0.6%	1	1.7%	2	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carer	0.3%	3	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	5.3%	53	5.5%	10	7.8%	8	6.7%	3	6.4%	7	5.6%	6	6.3%	6	2.3%	2	2.5%	3	4.9%	3	5.0%	4
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Zone 1	18.4%	185	100.0%	185	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	9.8%	98	0.0%	0	100.0%	98	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	5.0%	50	0.0%	0	0.0%	0	100.0%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	11.4%	114	0.0%	0	0.0%	0	0.0%	0	100.0%	114	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	11.3%	114	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	114	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6	9.2%	93	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	93	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	9.0%	90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	90	0.0%	0	0.0%	0	0.0%	0
Zone 8	10.8%	108	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	108	0.0%	0	0.0%	0
Zone 9	6.1%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	61	0.0%	0
Zone 10	8.9%	89	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	89
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

PC Postcode Sector

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
CT130	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.9%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT139	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT140	3.1%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	7	26.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT146	4.3%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.6%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT147	5.1%	52	0.0%	0	0.0%	0	0.0%	0	40.2%	46	4.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT148	1.4%	14	0.0%	0	0.0%	0	24.1%	12	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT149	13.2%	132	0.0%	0	0.0%	0	0.0%	0	57.7%	66	51.2%	58	8.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT154	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	11.5%	10	23.3%	25	0.0%	0	0.0%	0
CT155	1.6%	16	0.0%	0	0.6%	1	15.0%	8	0.0%	0	0.0%	0	9.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT156	3.0%	30	0.0%	0	0.0%	0	60.9%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT157	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.6%	20	0.0%	0	2.4%	2
CT161	2.1%	21	11.4%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT162	7.3%	73	6.5%	12	62.7%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT163	5.8%	58	0.0%	0	36.7%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.7%	22	0.0%	0	0.0%	0
CT170	10.5%	106	37.4%	69	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.6%	36	0.0%	0	0.0%	0
CT179	8.2%	83	44.7%	83	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CT187	8.0%	80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4	0.0%	0	85.8%	76
CT188	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
CT3 1	3.2%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.5%	20	0.0%	0	19.9%	12	0.0%	0
CT3 2	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.3%	20	0.0%	0	0.0%	0	0.0%	0
CT3 3	4.8%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.7%	39	0.0%	0	14.0%	9	0.0%	0
CT3 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
CT4 5	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.9%	24	0.0%	0
CT4 6	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.0%	15	10.6%	9
Weighted base:		1001		185		98		50		114		114		93		90		108		61		89
Sample:		1001		100		100		100		100		101		100		100		100		100		100

APPENDIX 5: CONVENIENCE GOODS MARKET SHARES

TABLE 1: ALL CONVENIENCE GOODS - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)												
Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, High Street, Dover	0.9%	0.2%	0.4%	0.7%	0.2%	0.0%	0.1%	0.5%	0.0%	0.0%	0.4%	0.3%
Marks & Spencer, Biggin Street, Dover	2.2%	2.1%	1.6%	0.0%	0.0%	0.3%	0.3%	2.7%	0.0%	0.0%	1.2%	1.0%
Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.8%	1.8%	0.4%	0.0%	0.5%	0.0%	0.0%	1.7%	0.0%	0.0%	0.7%	0.6%
Subtotal	3.9%	4.0%	2.4%	0.7%	0.7%	0.3%	0.4%	4.9%	0.0%	0.0%	2.2%	1.9%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)												
Co-op, Park Street, Deal	0.0%	0.0%	1.0%	0.5%	6.5%	0.4%	0.0%	0.0%	0.2%	0.0%	1.1%	0.9%
Co-op, Queens Street, Deal	0.0%	0.0%	1.3%	0.6%	0.6%	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%	0.2%
Iceland, Queen Street, Deal	0.0%	0.0%	0.6%	3.4%	6.4%	0.2%	0.2%	0.0%	0.0%	0.0%	1.4%	1.2%
Marks & Spencer, High Street, Deal	0.0%	0.0%	3.0%	2.6%	5.3%	1.4%	0.7%	0.4%	0.0%	0.0%	1.6%	1.3%
Sainsbury's Superstore, West Street, Deal	0.0%	0.4%	12.3%	32.6%	40.7%	12.0%	1.7%	0.4%	0.0%	0.0%	12.6%	10.6%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.2%	0.3%	1.0%	3.1%	9.7%	0.4%	0.1%	0.3%	0.4%	0.0%	2.0%	1.7%
Subtotal	0.2%	0.8%	19.3%	42.8%	69.2%	14.4%	2.7%	1.4%	0.6%	0.0%	19.0%	16.0%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)												
Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	0.2%	18.2%	3.8%	0.7%	0.7%	0.0%	2.7%	2.3%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.5%	3.7%	1.9%	0.0%	0.0%	0.0%	0.7%	0.6%
Subtotal	0.0%	0.0%	0.0%	0.0%	1.1%	22.8%	5.8%	0.7%	0.7%	0.0%	3.6%	3.1%
AYLESHAM (RURAL SERVICE CENTRE)												
Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	1.5%	0.0%	0.9%	0.9%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.2%	0.1%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%	1.5%	0.0%	1.1%	1.0%
LOCAL CENTRES												
ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.6%	0.5%
CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%	0.1%
WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	2.3%	0.3%	0.5%	0.6%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	9.4%	1.0%	2.3%	0.3%	1.3%	1.3%
VILLAGES & HAMLETS												
ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.8%	0.0%	0.1%
KINGSDOWN	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
ST.MARGARET'S AT CLIFFE	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Subtotal	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.8%	0.4%	0.4%
OUT-OF-CENTRE												
Dover Aldi, Cherry Tree Avenue, Dover	24.8%	17.3%	10.9%	9.9%	3.9%	8.7%	1.4%	23.9%	0.0%	0.4%	13.4%	11.3%
Asda Supermarket, Charlton Green, Dover	9.1%	4.4%	3.2%	0.4%	3.6%	0.0%	0.7%	1.5%	0.4%	0.0%	3.2%	2.7%
Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	1.1%	0.9%
Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Farm Foods, Charlton Green, Dover	0.3%	0.0%	0.6%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Morrisons, Bridge Street, Dover	33.8%	18.5%	9.3%	2.7%	2.2%	2.3%	0.3%	14.7%	0.3%	1.8%	11.7%	10.0%
Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	14.6%	38.5%	35.9%	12.7%	4.0%	22.1%	14.2%	31.4%	1.3%	2.1%	20.0%	17.1%
Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	4.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
Deal Co-op, Beauchamp Avenue, Mill Hill, Deal	1.6%	0.0%	0.4%	8.0%	3.1%	2.6%	0.0%	0.0%	0.0%	0.0%	2.1%	1.8%
Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Mill Hill, Deal	0.9%	0.3%	2.9%	5.0%	2.6%	1.1%	0.0%	0.0%	0.0%	0.0%	1.6%	1.3%
Walmer-Local Stores	0.0%	0.0%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Sandwich N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	85.2%	83.3%	63.7%	39.0%	19.7%	37.2%	16.5%	79.4%	2.1%	4.3%	53.7%	45.8%
DOVER DISTRICT COUNCIL AREA	89.3%	88.1%	90.4%	82.5%	90.6%	75.2%	44.4%	87.4%	7.2%	5.4%	81.3%	69.5%
OTHER STORES OUTSIDE DDC AREA												
Ashford	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.3%	0.1%	0.1%
Broadstairs / Westwood	0.3%	0.0%	2.1%	1.7%	1.3%	7.8%	2.8%	0.2%	0.8%	0.0%	1.9%	1.6%
Canterbury	1.7%	2.2%	2.1%	2.3%	0.7%	3.1%	39.4%	3.8%	81.0%	3.9%	6.6%	11.1%
Folkestone	4.4%	3.7%	1.6%	0.0%	0.0%	0.3%	0.4%	4.3%	0.5%	59.6%	2.0%	7.3%
Hawkinge	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%	0.4%	0.0%	0.6%	22.0%	0.1%	2.2%
Hythe	0.0%	0.0%	0.2%	0.5%	0.0%	0.1%	0.0%	0.4%	0.0%	1.8%	0.1%	0.3%
Margate	0.0%	0.0%	0.0%	0.0%	1.7%	1.2%	0.4%	0.0%	0.0%	0.0%	0.4%	0.4%
Ramsgate	0.0%	0.0%	0.3%	0.9%	0.0%	7.8%	5.1%	0.2%	0.0%	0.0%	1.7%	1.4%
ALL OTHER CENTRES / STORES:	0.1%	0.0%	0.2%	1.3%	0.0%	0.3%	1.4%	0.6%	1.2%	0.7%	0.5%	0.6%
All other Centres / stores	6.9%	5.9%	6.5%	6.6%	4.0%	20.6%	50.1%	9.5%	84.2%	88.2%	13.4%	24.9%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	3.8%	6.0%	3.1%	10.8%	5.4%	4.2%	5.4%	3.1%	8.6%	6.4%	5.3%	5.6%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 2: MAIN FOOD PURCHASES - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Iceland, High Street, Dover	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%	0.1%
	Marks & Spencer, Biggin Street, Dover	0.4%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.8%	0.0%	0.7%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.0%	0.4%	0.3%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0%	0.0%	0.0%	0.5%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
	Co-op, Queens Street, Deal	0.0%	0.0%	1.3%	0.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
	Iceland, Queen Street, Deal	0.0%	0.0%	0.7%	3.1%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	1.2%
	Marks & Spencer, High Street, Deal	0.0%	0.0%	0.7%	1.2%	2.8%	0.6%	1.1%	0.0%	0.0%	0.0%	0.8%	0.7%
	Sainsbury's Superstore, West Street, Deal	0.0%	0.5%	15.4%	40.0%	56.0%	11.4%	2.4%	0.7%	0.0%	0.0%	16.0%	13.5%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.6%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
	Subtotal	0.0%	0.5%	18.0%	45.9%	70.9%	12.0%	3.5%	0.7%	0.0%	0.0%	19.2%	16.2%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	13.9%	4.9%	0.7%	0.0%	0.0%	2.3%	2.0%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	4.9%	0.7%	0.0%	0.0%	2.4%	2.0%
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.7%	0.0%	0.1%	0.2%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.7%	0.0%	0.1%	0.2%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.1%	0.1%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.2%	0.2%
VILLAGES & HAMLETS													
	ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	KINGSDOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ST.MARGARET'S AT CLIFFE	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
	Subtotal	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	27.4%	19.0%	6.7%	7.4%	3.5%	13.2%	1.5%	26.1%	0.0%	0.7%	14.2%	12.0%
	Asda Supermarket, Charlton Green, Dover	7.7%	1.7%	1.8%	0.6%	6.1%	0.0%	1.1%	0.0%	0.0%	0.0%	2.8%	2.3%
	Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.2%	0.2%
	Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Farm Foods, Charlton Green, Dover	0.0%	0.0%	0.7%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Morrisons, Bridge Street, Dover	33.4%	15.5%	5.3%	2.6%	3.3%	2.1%	0.0%	15.2%	0.0%	0.7%	11.2%	9.5%
	Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	16.4%	53.8%	49.7%	14.4%	4.8%	28.7%	18.9%	43.1%	0.7%	3.4%	26.1%	22.4%
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.0%	0.0%	0.0%	5.5%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%
	Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Express, Mill Hill, Deal	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Walmer-Local Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sandwich	N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	84.8%	90.1%	64.2%	31.1%	19.2%	44.5%	21.5%	85.8%	0.7%	4.8%	55.6%	47.4%
DOVER DISTRICT COUNCIL AREA		85.6%	90.6%	88.6%	77.0%	90.8%	70.8%	33.1%	87.8%	1.3%	4.8%	78.3%	66.5%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%	0.1%
	Broadstairs / Westwood	0.5%	0.0%	2.5%	1.9%	2.0%	11.2%	3.9%	0.0%	1.3%	0.0%	2.6%	2.3%
	Canterbury	1.6%	0.6%	2.0%	2.1%	0.0%	4.2%	45.4%	3.0%	81.7%	2.4%	7.0%	11.3%
	Folkestone	6.2%	1.9%	2.5%	0.0%	0.0%	0.5%	0.6%	3.6%	0.8%	68.6%	2.1%	8.2%
	Hawkinge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	12.3%	0.1%	1.2%
	Hythe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	2.2%	0.1%	0.3%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.6%	0.0%	0.0%	0.0%	0.3%	0.3%
	Ramsgate	0.0%	0.0%	0.0%	1.0%	0.0%	7.3%	6.1%	0.0%	0.0%	0.0%	1.7%	1.4%
ALL OTHER CENTRES / STORES:		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.2%	0.0%	0.1%	0.2%
All other Centres / stores		8.7%	2.5%	6.9%	5.0%	2.0%	25.2%	57.8%	7.8%	85.0%	85.5%	14.1%	25.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		5.7%	6.9%	4.5%	18.0%	7.2%	3.9%	9.1%	4.3%	13.7%	9.7%	7.6%	8.2%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 3: OTHER ('SECONDARY') MAIN FOOD PURCHASES - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)												
Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, High Street, Dover	2.1%	1.0%	0.9%	0.0%	0.0%	0.0%	1.0%	1.3%	0.0%	0.0%	0.8%	0.7%
Marks & Spencer, Biggin Street, Dover	2.7%	2.4%	1.7%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	1.6%	1.3%
Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
Subtotal	6.8%	3.4%	2.6%	0.0%	0.0%	0.0%	1.0%	6.4%	0.0%	0.0%	2.7%	2.3%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)												
Co-op, Park Street, Deal	0.0%	0.0%	1.7%	1.1%	6.3%	0.9%	0.0%	0.0%	1.2%	0.0%	1.2%	1.1%
Co-op, Queens Street, Deal	0.0%	0.0%	0.9%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
Iceland, Queen Street, Deal	0.0%	0.0%	1.7%	10.4%	2.9%	1.6%	0.0%	0.0%	0.0%	0.0%	2.1%	1.8%
Marks & Spencer, High Street, Deal	0.0%	0.0%	5.4%	2.9%	16.7%	4.4%	0.0%	0.0%	0.0%	0.0%	3.6%	3.0%
Sainsbury's Superstore, West Street, Deal	0.0%	0.0%	12.3%	23.7%	18.8%	5.4%	1.8%	0.0%	0.0%	0.0%	7.5%	6.3%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	1.1%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.9%
Subtotal	0.0%	0.0%	22.0%	40.7%	51.6%	12.3%	1.8%	0.0%	1.2%	0.0%	15.8%	13.4%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)												
Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	16.5%	1.0%	0.0%	0.0%	0.0%	2.1%	1.7%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.0%	0.0%	0.0%	0.0%	0.3%	0.3%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	20.3%	1.9%	0.0%	0.0%	0.0%	2.6%	2.2%
AYLESHAM (RURAL SERVICE CENTRE)												
Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.8%	0.7%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.8%	0.7%
LOCAL CENTRES												
ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.1%	0.1%
CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	1.2%	0.0%	0.7%	0.6%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	0.0%	1.2%	0.0%	0.8%	0.7%
VILLAGES & HAMLETS												
ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
KINGSDOWN	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ST.MARGARET'S AT CLIFFE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE												
Dover Aldi, Cherry Tree Avenue, Dover	32.3%	23.5%	21.2%	13.8%	11.8%	5.2%	2.9%	29.0%	0.0%	0.0%	18.2%	15.3%
Asda Supermarket, Charlton Green, Dover	10.8%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	2.9%	2.4%
Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Farm Foods, Charlton Green, Dover	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Morrisons, Bridge Street, Dover	26.2%	32.0%	23.8%	7.5%	1.7%	5.2%	1.8%	16.3%	0.0%	0.0%	14.1%	11.9%
Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	13.2%	15.0%	18.9%	19.9%	5.9%	21.8%	8.7%	23.7%	3.4%	0.0%	15.6%	13.4%
Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deal Co-op, Beauchamp Avenue, Mill Hill, Deal	0.0%	0.0%	0.0%	0.9%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.6%
Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Mill Hill, Deal	0.0%	1.0%	0.9%	1.6%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
Walmer-Local Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sandwich N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	82.5%	73.1%	64.7%	43.8%	25.7%	33.1%	13.4%	74.4%	3.4%	0.0%	52.2%	44.2%
DOVER DISTRICT COUNCIL AREA	89.3%	76.6%	89.3%	84.5%	77.3%	65.7%	31.7%	80.8%	5.7%	0.0%	74.9%	63.5%
OTHER STORES OUTSIDE DDC AREA												
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	2.3%	0.0%	0.3%
Broadstairs / Westwood	0.0%	0.0%	1.7%	3.6%	0.9%	6.8%	2.9%	1.3%	0.0%	0.0%	2.1%	1.7%
Canterbury	3.3%	1.0%	4.4%	5.2%	1.7%	3.9%	46.4%	2.9%	89.4%	5.4%	8.2%	13.1%
Folkestone	4.0%	10.2%	0.9%	0.0%	0.0%	0.0%	0.0%	9.6%	0.0%	62.8%	3.2%	8.6%
Hawkinge	0.8%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	2.2%	24.6%	0.3%	2.7%
Hythe	0.0%	0.0%	1.1%	1.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.9%	0.3%	0.4%
Margate	0.0%	0.0%	0.0%	0.0%	11.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.4%
Ramsgate	0.0%	0.0%	0.0%	2.0%	0.0%	13.0%	9.7%	1.6%	0.0%	0.0%	3.2%	2.7%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	9.3%	0.0%	0.0%	0.0%	1.6%	1.3%
All other Centres / stores	8.1%	11.2%	8.0%	15.5%	15.3%	24.7%	68.3%	15.5%	92.8%	96.1%	20.4%	32.1%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	2.6%	12.2%	2.7%	0.0%	7.4%	9.6%	0.0%	3.7%	1.5%	3.9%	4.6%	4.4%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 4: TOP UP FOOD PURCHASES - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Iceland, High Street, Dover	0.9%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
	Marks & Spencer, Biggin Street, Dover	7.9%	4.1%	4.6%	0.0%	0.0%	0.0%	1.8%	7.9%	0.0%	0.0%	3.5%	2.9%
	Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.9%	5.1%	2.4%	0.0%	0.8%	0.0%	0.0%	9.0%	0.0%	0.0%	2.2%	1.9%
	Subtotal	9.6%	9.2%	7.0%	0.0%	1.9%	0.0%	1.8%	16.9%	0.0%	0.0%	5.9%	5.0%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0%	0.0%	2.7%	0.0%	6.9%	1.5%	0.0%	0.0%	0.0%	0.0%	1.3%	1.1%
	Co-op, Queens Street, Deal	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.4%	0.3%
	Iceland, Queen Street, Deal	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%
	Marks & Spencer, High Street, Deal	0.0%	0.0%	5.3%	5.7%	3.2%	2.5%	0.0%	0.0%	0.0%	0.0%	1.9%	1.6%
	Sainsbury's Superstore, West Street, Deal	0.0%	0.9%	6.4%	23.2%	26.5%	9.5%	0.0%	0.0%	0.0%	0.0%	8.5%	7.1%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.8%	4.6%	11.8%	44.6%	0.8%	1.0%	2.3%	0.0%	0.0%	8.7%	7.3%
	Subtotal	0.0%	1.7%	21.6%	40.7%	87.9%	14.3%	1.0%	3.9%	0.0%	0.0%	21.6%	18.2%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	1.0%	45.4%	2.0%	1.5%	4.6%	0.0%	6.0%	5.3%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	1.6%	8.2%	0.0%	0.0%	0.0%	0.0%	1.2%	1.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	2.6%	53.5%	2.0%	1.5%	4.6%	0.0%	7.2%	6.3%
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	33.4%	0.0%	4.6%	0.0%	3.9%	3.6%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.4%	0.4%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	37.1%	0.0%	4.6%	0.0%	4.3%	4.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.6%	0.0%	0.0%	0.0%	3.2%	2.7%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.0%	0.9%	0.8%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.8%	0.0%	10.9%	0.0%	1.1%	1.7%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	37.3%	6.7%	10.9%	0.0%	5.7%	5.5%
VILLAGES & HAMLETS													
	ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	5.5%	0.2%	0.7%
	KINGSDOWN	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	ST.MARGARET'S AT CLIFFE	0.0%	0.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%
	Subtotal	0.0%	0.0%	7.5%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	5.5%	0.8%	1.2%
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	13.0%	14.7%	15.3%	5.7%	0.0%	0.0%	0.0%	11.8%	0.0%	0.0%	7.3%	6.2%
	Asda Supermarket, Charlton Green, Dover	6.7%	8.0%	14.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	2.6%
	Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	34.0%	0.0%	0.0%	4.6%	3.9%
	Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Farm Foods, Charlton Green, Dover	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Morrisons, Bridge Street, Dover	49.1%	17.5%	3.3%	0.0%	0.0%	1.8%	0.0%	8.1%	2.1%	0.0%	12.3%	10.5%
	Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	12.2%	22.9%	19.7%	3.8%	0.0%	9.5%	10.8%	9.0%	0.0%	0.0%	10.1%	8.5%
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	17.7%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.7%
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.0%	0.0%	3.0%	19.3%	3.4%	2.5%	0.0%	0.0%	0.0%	0.0%	3.6%	3.0%
	Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Express, Mill Hill, Deal	6.1%	0.9%	3.0%	26.8%	3.1%	4.9%	0.0%	0.0%	0.0%	0.0%	6.0%	5.1%
	Walmer-Local Stores	0.0%	0.0%	1.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
Sandwich	N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	87.1%	81.8%	62.2%	57.7%	6.5%	18.7%	10.8%	62.9%	2.1%	0.0%	49.4%	41.8%
DOVER DISTRICT COUNCIL AREA		96.7%	92.6%	98.4%	98.4%	99.0%	90.0%	92.8%	91.9%	22.1%	5.5%	95.0%	82.0%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Broadstairs / Westwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Canterbury	1.7%	0.8%	0.0%	1.6%	1.0%	0.0%	7.2%	4.4%	76.8%	3.7%	2.2%	7.1%
	Folkestone	0.7%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	36.3%	1.2%	4.4%
	Hawkinge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	47.6%	0.0%	4.5%
	Hythe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.2%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	0.0%	0.0%	0.0%	1.0%	0.8%
ALL OTHER CENTRES / STORES:		0.9%	0.0%	1.6%	0.0%	0.0%	1.8%	0.0%	1.3%	0.0%	4.8%	0.7%	1.0%
All other Centres / stores		3.3%	7.4%	1.6%	1.6%	1.0%	10.0%	7.2%	8.1%	76.8%	94.5%	5.0%	17.9%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.1%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 5: OTHER TOP UP FOOD PURCHASES - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)												
Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, High Street, Dover	1.9%	0.0%	2.7%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.3%
Marks & Spencer, Biggin Street, Dover	4.2%	11.4%	2.7%	0.0%	0.0%	2.7%	0.0%	7.2%	0.0%	0.0%	3.5%	2.9%
Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	3.4%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	2.2%	1.8%
Subtotal	9.5%	21.4%	5.4%	7.5%	0.0%	2.7%	0.0%	10.8%	0.0%	0.0%	7.2%	6.0%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)												
Co-op, Park Street, Deal	0.0%	0.0%	3.3%	0.0%	26.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	3.2%
Co-op, Queens Street, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Queen Street, Deal	0.0%	0.0%	0.0%	0.0%	9.6%	0.0%	2.1%	0.0%	0.0%	0.0%	1.6%	1.3%
Marks & Spencer, High Street, Deal	0.0%	0.0%	10.4%	6.4%	6.7%	0.0%	0.0%	3.6%	0.0%	0.0%	3.0%	2.5%
Sainsbury's Superstore, West Street, Deal	0.0%	0.0%	2.7%	16.1%	2.4%	29.7%	0.0%	0.0%	0.0%	0.0%	6.2%	5.2%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	1.9%	2.3%	2.7%	7.5%	12.5%	2.7%	0.0%	0.0%	4.3%	0.0%	3.8%	3.5%
Subtotal	1.9%	2.3%	19.1%	30.0%	57.2%	32.5%	2.1%	3.6%	4.3%	0.0%	18.4%	15.8%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)												
Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	4.3%	5.5%	0.0%	0.0%	0.0%	0.0%	1.3%	1.1%
Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	4.6%	0.0%	0.0%	0.0%	1.3%	1.1%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	2.4%	19.1%	17.9%	0.0%	0.0%	0.0%	4.7%	4.0%
Subtotal	0.0%	0.0%	0.0%	0.0%	6.7%	30.9%	22.4%	0.0%	0.0%	0.0%	7.2%	6.1%
AYLESHAM (RURAL SERVICE CENTRE)												
Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%	0.0%	4.3%	0.0%	1.2%	1.3%
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	0.9%	0.8%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.8%	0.0%	4.3%	0.0%	2.1%	2.0%
LOCAL CENTRES												
ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%	0.0%	0.0%	0.7%	0.6%
CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	0.0%	5.2%	3.3%	1.3%	1.7%
Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%	5.2%	3.3%	2.0%	2.3%
VILLAGES & HAMLETS												
ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
KINGSDOWN	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ST.MARGARET'S AT CLIFFE	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Subtotal	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
OUT-OF-CENTRE												
Dover Aldi, Cherry Tree Avenue, Dover	15.7%	1.9%	14.3%	25.3%	0.0%	0.0%	0.0%	21.2%	0.0%	0.0%	10.3%	8.7%
Asda Supermarket, Charlton Green, Dover	18.1%	18.6%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	4.3%	0.0%	6.2%	5.5%
Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.1%	0.0%	0.0%	2.6%	2.2%
Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Farm Foods, Charlton Green, Dover	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%
Morrisons, Bridge Street, Dover	25.2%	17.2%	20.9%	0.0%	0.0%	0.0%	0.0%	19.1%	0.0%	13.4%	10.4%	10.0%
Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	9.9%	4.6%	2.7%	5.2%	2.4%	2.2%	0.0%	6.6%	4.3%	0.0%	4.7%	4.2%
Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	17.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	1.6%
Deal Co-op, Beauchamp Avenue, Mill Hill, Deal	16.3%	0.0%	0.0%	16.6%	9.6%	22.1%	0.0%	0.0%	0.0%	0.0%	9.1%	7.7%
Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Mill Hill, Deal	0.0%	0.0%	23.4%	4.5%	21.2%	2.7%	0.0%	0.0%	0.0%	0.0%	5.5%	4.6%
Walmer-Local Stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sandwich N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Subtotal	88.6%	60.0%	61.4%	51.6%	33.2%	27.0%	0.0%	73.2%	8.6%	13.4%	51.3%	45.0%
DOVER DISTRICT COUNCIL AREA	100.0%	83.7%	91.3%	89.1%	97.1%	93.1%	59.1%	87.6%	22.3%	16.7%	88.5%	77.6%
OTHER STORES OUTSIDE DDC AREA												
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Broadstairs / Westwood	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
Canterbury	0.0%	16.3%	2.7%	0.0%	2.9%	0.0%	40.9%	8.8%	71.1%	10.2%	8.3%	12.5%
Folkestone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	35.5%	0.5%	3.7%
Hawkinge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	37.5%	0.0%	3.7%
Hythe	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ramsgate	0.0%	0.0%	2.7%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	1.0%	1.1%
All other Centres / stores	0.0%	16.3%	8.7%	10.9%	2.9%	2.7%	40.9%	12.4%	77.7%	83.3%	11.0%	22.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

APPENDIX 6: COMPARISON GOODS MARKET SHARES

TABLE 1: ALL COMPARISON GOODS - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	31.2%	28.9%	11.2%	3.9%	2.8%	2.0%	1.3%	17.6%	0.5%	0.6%	12.7%	10.6%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%	0.0%	0.2%	0.3%	0.0%	0.1%	0.1%
Edge-of Centre	Charlton SC	0.1%	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.1%	0.1%
	Subtotal	31.4%	29.3%	11.4%	3.9%	2.8%	2.3%	1.3%	18.1%	0.8%	0.6%	12.9%	10.7%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.7%	0.5%	11.2%	22.4%	37.7%	9.0%	1.2%	2.3%	0.2%	0.0%	11.1%	9.2%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	1.8%	0.0%	0.4%	0.6%	6.5%	1.2%	0.5%	0.2%	0.0%	1.3%	1.1%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.3%	0.2%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.7%	0.0%	0.2%	0.1%	0.2%	0.2%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.1%	0.0%	0.0%	0.1%	0.1%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.9%	0.1%	0.2%	0.1%	0.3%	0.3%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.6%	0.3%	0.0%	0.0%	0.3%	0.0%	0.0%	0.3%	0.0%	0.0%	0.2%	0.2%
	B&Q, Honeywood Parkway, Whitfield	3.4%	4.1%	3.4%	3.3%	1.9%	1.7%	1.4%	4.4%	0.4%	0.2%	3.0%	2.5%
	Homebase, Dover Business Park, Whitfield	0.6%	1.0%	0.9%	0.7%	0.6%	1.0%	0.1%	0.6%	0.1%	0.0%	0.7%	0.6%
	Screwfix, Dover Business Park, Whitfield, Dover	0.1%	0.0%	0.6%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Jewson, Coombe Valley Road, Dover	0.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	1.0%	0.5%	1.5%	0.3%	0.0%	0.1%	0.1%	0.7%	0.0%	0.0%	0.5%	0.4%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	1.7%	6.3%	6.7%	4.2%	1.1%	5.4%	1.0%	8.5%	0.2%	0.0%	4.1%	3.4%
	Whitfield-Other	0.0%	0.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.2%	0.2%
	Subtotal	7.5%	12.5%	15.4%	8.5%	4.0%	8.6%	2.7%	14.7%	0.6%	0.2%	8.8%	7.4%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.4%	0.2%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
DOVER DISTRICT COUNCIL AREA		39.6%	44.1%	38.0%	35.5%	45.4%	27.1%	10.6%	35.8%	2.0%	0.9%	34.8%	29.0%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	2.5%	0.9%	0.6%	0.3%	0.4%	0.1%	0.3%	0.4%	0.1%	3.6%	0.8%	1.0%
	Ashford- Ashford Designer Outlet	3.8%	0.4%	0.7%	0.0%	0.1%	0.1%	0.0%	0.8%	0.6%	0.3%	0.8%	0.8%
	Westwood	4.4%	3.0%	8.2%	25.2%	14.5%	28.4%	9.0%	4.2%	0.8%	0.3%	12.3%	10.3%
	Canterbury	12.1%	20.0%	25.8%	13.2%	9.6%	15.8%	54.6%	30.9%	66.4%	16.5%	21.7%	24.1%
	Folkestone	9.3%	6.2%	2.7%	0.3%	1.2%	0.2%	1.0%	3.9%	0.1%	46.3%	3.2%	7.6%
	Margate	0.2%	1.2%	0.1%	0.2%	0.5%	1.5%	0.3%	0.0%	0.0%	0.0%	0.5%	0.4%
	Ramsgate	0.0%	0.0%	0.5%	0.0%	0.0%	0.7%	0.9%	0.0%	0.0%	0.0%	0.2%	0.2%
	ALL OTHER CENTRES / STORES:	0.7%	2.8%	1.6%	2.3%	1.0%	1.6%	1.1%	0.8%	6.3%	4.6%	1.4%	2.1%
All other Centres / stores		33.0%	34.6%	40.2%	41.5%	27.2%	48.5%	67.2%	41.0%	74.5%	71.7%	41.0%	46.5%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		27.5%	21.4%	21.8%	23.0%	27.4%	24.5%	22.2%	23.2%	23.5%	27.4%	24.2%	24.5%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 2: **CLOTHING & FOOTWEAR - 2017 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	10.6%	12.6%	8.6%	0.7%	1.3%	0.9%	2.0%	8.5%	0.0%	0.6%	5.6%	4.7%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.7%	0.0%	0.0%	0.5%	0.0%	0.7%	0.7%	0.0%	0.2%	0.2%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	10.6%	12.6%	9.3%	0.7%	1.3%	1.4%	2.0%	9.2%	0.7%	0.6%	5.8%	4.9%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.5%	6.0%	4.9%	23.4%	2.9%	0.0%	3.1%	0.0%	0.0%	5.4%	4.5%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	0.0%	0.0%	1.1%	0.5%	3.8%	0.0%	0.0%	0.0%	0.0%	0.7%	0.6%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	1.3%	3.2%	0.0%	0.0%	0.7%	0.6%
	Whitfield-Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.6%	0.0%	0.0%	0.5%	0.0%	1.3%	3.2%	0.0%	0.0%	0.7%	0.6%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DOVER DISTRICT COUNCIL AREA		10.6%	13.6%	15.4%	6.7%	25.8%	8.7%	3.3%	15.5%	0.7%	0.6%	12.6%	10.6%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	3.8%	1.9%	0.7%	0.7%	1.3%	0.6%	0.6%	0.0%	0.0%	6.8%	1.4%	1.9%
	Ashford- Ashford Designer Outlet	10.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	2.7%	1.3%	2.3%	2.2%
	Westwood	6.3%	4.5%	16.1%	50.3%	32.2%	41.0%	8.2%	8.2%	1.5%	1.3%	21.4%	18.1%
	Canterbury	18.3%	40.6%	50.8%	23.2%	18.7%	24.8%	70.6%	52.3%	66.1%	34.3%	34.5%	36.4%
	Folkestone	22.5%	13.0%	2.1%	1.0%	1.0%	0.0%	0.6%	3.3%	0.0%	38.2%	6.4%	9.4%
	Margate	0.5%	4.1%	0.0%	0.7%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	ALL OTHER CENTRES / STORES:	0.4%	1.9%	0.7%	4.3%	0.7%	0.6%	1.3%	0.6%	5.2%	1.2%	1.3%	1.6%
All other Centres / stores		62.8%	66.7%	70.5%	80.2%	53.9%	70.7%	81.5%	66.8%	75.5%	83.1%	68.3%	70.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		26.6%	19.7%	14.2%	13.2%	20.3%	20.6%	15.3%	17.7%	23.9%	16.3%	19.1%	19.1%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Carter Jonas

TABLE 3: **RECORDING MEDIA - 2017 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	5.8%	16.2%	6.0%	2.4%	0.0%	1.6%	0.0%	7.8%	0.0%	0.0%	4.5%	3.7%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	5.8%	16.2%	6.0%	2.4%	0.0%	1.6%	0.0%	7.8%	0.0%	0.0%	4.5%	3.7%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.9%	1.2%	5.5%	23.4%	1.9%	0.0%	0.0%	0.0%	0.0%	4.0%	3.3%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	1.5%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	4.2%	3.2%	3.5%	8.3%	0.9%	7.3%	2.9%	8.1%	0.0%	0.0%	5.0%	4.1%
	Whitfield-Other	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.2%	0.2%
	Subtotal	4.2%	3.2%	6.2%	9.3%	1.9%	7.3%	2.9%	9.1%	0.0%	0.0%	5.6%	4.5%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DOVER DISTRICT COUNCIL AREA		10.0%	20.3%	13.3%	17.2%	25.4%	12.3%	2.9%	16.8%	0.0%	0.0%	14.3%	11.7%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westwood	9.4%	0.9%	7.4%	11.2%	5.4%	14.7%	2.9%	0.0%	0.0%	0.0%	6.5%	5.3%
	Canterbury	6.1%	12.5%	5.7%	0.8%	3.4%	16.9%	39.4%	10.6%	37.3%	13.7%	12.8%	14.7%
	Folkestone	10.2%	3.7%	0.0%	0.8%	0.0%	0.0%	1.3%	1.7%	0.0%	27.3%	2.4%	4.9%
	Margate	1.3%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	6.5%	0.0%	0.0%	0.0%	1.1%	0.9%
	ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	1.1%	0.0%	1.5%	0.5%	0.6%
All other Centres / stores		26.9%	20.9%	13.1%	12.7%	8.7%	35.9%	52.4%	13.4%	37.3%	42.5%	24.2%	27.2%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		63.1%	58.8%	73.5%	70.0%	65.9%	51.8%	44.7%	69.7%	62.7%	57.5%	61.4%	61.1%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 4: AUDIO VISUAL, PHOTOGRAPHIC & COMPUTER ITEMS - 2017 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	18.2%	22.3%	2.3%	12.7%	2.8%	0.0%	0.0%	8.5%	1.3%	0.0%	8.6%	7.1%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	18.2%	22.3%	2.3%	12.7%	2.8%	0.0%	0.0%	8.5%	1.3%	0.0%	8.6%	7.1%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.6%	3.8%	3.1%	18.8%	4.1%	0.7%	0.0%	0.0%	0.0%	4.1%	3.3%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	2.5%	0.0%	0.0%	0.0%	0.4%	0.3%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.7%	0.0%	0.2%	0.2%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.7%	0.0%	0.2%	0.2%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.1%	0.1%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	4.3%	3.8%	6.1%	6.9%	1.9%	6.5%	0.8%	10.0%	1.3%	0.0%	5.1%	4.3%
	Whitfield-Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	4.3%	3.8%	7.6%	6.9%	1.9%	6.5%	1.5%	10.0%	1.3%	0.0%	5.3%	4.5%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.6%	0.0%	0.6%	0.0%	0.7%	0.0%	0.0%	0.3%	0.2%
	Subtotal	0.0%	0.0%	0.0%	0.6%	0.0%	0.6%	0.0%	0.7%	0.0%	0.0%	0.3%	0.2%
DOVER DISTRICT COUNCIL AREA		22.4%	26.7%	13.7%	23.4%	23.4%	13.6%	4.7%	19.1%	3.3%	0.0%	18.8%	15.7%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	2.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.8%	1.3%	5.7%	0.5%	1.1%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.7%	0.6%	0.0%	2.2%	0.0%	0.0%	0.5%	0.4%
	Westwood	4.5%	1.0%	9.7%	19.3%	13.9%	27.8%	7.5%	5.1%	0.0%	0.0%	11.3%	9.3%
	Canterbury	5.2%	9.7%	7.8%	13.8%	7.9%	6.2%	44.3%	19.5%	57.8%	1.7%	14.3%	16.0%
	Folkestone	5.4%	7.9%	9.5%	0.0%	0.0%	0.6%	0.7%	5.4%	0.0%	49.6%	3.3%	8.0%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	1.5%	0.0%	0.0%	0.0%	0.6%	0.5%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.3%	0.3%
	ALL OTHER CENTRES / STORES:	3.7%	0.0%	3.1%	0.6%	0.0%	0.6%	4.0%	0.7%	4.1%	4.6%	1.5%	2.0%
All other Centres / stores		18.9%	21.0%	31.7%	33.8%	22.5%	38.8%	60.8%	33.6%	63.2%	61.6%	32.2%	37.5%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		58.7%	52.3%	54.7%	42.9%	54.1%	47.6%	34.5%	47.3%	33.4%	38.4%	49.0%	46.8%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 5: BOOKS, STATIONERY & DRAWING MATERIALS - 2017 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	63.8%	49.3%	29.6%	0.0%	0.8%	1.1%	0.0%	21.9%	1.3%	1.6%	19.7%	16.4%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	63.8%	49.3%	29.6%	0.0%	0.8%	1.1%	0.0%	21.9%	1.3%	1.6%	19.7%	16.4%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.0%	8.8%	30.7%	51.3%	16.8%	1.5%	0.0%	0.0%	0.0%	14.6%	12.0%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	5.0%	0.0%	0.0%	0.6%	11.2%	2.6%	0.9%	0.0%	0.0%	2.5%	2.1%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.3%	0.2%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	0.7%	2.4%	2.3%	2.0%	0.0%	0.8%	1.0%	9.5%	0.0%	0.0%	2.5%	2.0%
	Whitfield-Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	1.3%	2.4%	3.8%	2.0%	0.0%	0.8%	1.0%	9.5%	0.0%	0.0%	2.7%	2.2%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DOVER DISTRICT COUNCIL AREA		65.1%	56.7%	42.1%	32.7%	52.7%	29.9%	7.6%	32.3%	1.3%	1.6%	39.8%	32.9%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.6%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Westwood	0.0%	1.6%	1.7%	10.9%	4.3%	19.1%	2.0%	1.7%	0.0%	0.0%	5.5%	4.5%
	Canterbury	5.3%	10.4%	8.8%	8.7%	0.8%	10.3%	47.7%	13.5%	53.7%	13.1%	12.7%	15.7%
	Folkestone	0.7%	2.3%	0.0%	0.0%	0.0%	0.0%	2.3%	3.6%	0.0%	31.4%	1.1%	4.3%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	ALL OTHER CENTRES / STORES:	0.0%	2.3%	2.7%	2.7%	0.0%	0.0%	0.8%	1.7%	0.0%	8.6%	1.2%	1.9%
All other Centres / stores		6.1%	16.8%	13.2%	22.3%	5.8%	30.2%	52.9%	20.4%	53.7%	58.3%	20.7%	27.2%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		28.8%	26.5%	44.6%	45.0%	41.5%	39.9%	39.5%	47.3%	45.0%	40.1%	39.5%	39.9%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 6: **PET PRODUCTS, HOBBY ITEMS, SPORTSWEAR, CAMPING, CYCLING & MUSICAL INSTRUMENTS - 2017 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	39.0%	43.3%	8.3%	4.3%	8.4%	2.1%	2.0%	17.2%	1.8%	0.0%	15.8%	13.2%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	39.9%	43.3%	8.3%	4.3%	8.4%	2.1%	2.0%	17.2%	1.8%	0.0%	16.0%	13.3%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	4.4%	0.0%	10.0%	14.9%	37.7%	2.2%	2.6%	0.0%	0.0%	0.0%	9.2%	7.6%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	5.9%	0.0%	0.0%	0.0%	3.4%	1.7%	0.0%	0.0%	0.0%	1.3%	1.0%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	2.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	5.0%	2.8%	6.1%	1.5%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.9%	1.6%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	5.2%	2.8%	10.6%	13.0%	0.8%	7.3%	1.1%	12.9%	0.0%	0.0%	6.6%	5.4%
	Whitfield-Other	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	12.3%	5.5%	18.2%	14.5%	1.8%	7.3%	1.1%	14.5%	0.0%	0.0%	9.1%	7.5%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
DOVER DISTRICT COUNCIL AREA		56.5%	54.8%	36.5%	33.7%	48.7%	15.0%	7.3%	31.7%	2.8%	0.0%	35.6%	29.6%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	1.2%	0.5%	0.5%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westwood	4.7%	5.6%	8.8%	28.8%	11.0%	30.5%	10.1%	2.2%	1.8%	0.0%	12.8%	10.7%
	Canterbury	4.5%	12.1%	13.8%	3.5%	0.8%	10.6%	52.6%	29.6%	45.5%	3.6%	15.8%	16.5%
	Folkestone	1.2%	0.0%	0.9%	0.0%	3.3%	0.0%	1.7%	2.9%	0.0%	50.5%	1.3%	6.6%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
	Ramsgate	0.0%	0.0%	3.3%	0.0%	0.0%	0.9%	1.7%	0.0%	0.0%	0.0%	0.6%	0.5%
	ALL OTHER CENTRES / STORES:	0.0%	0.7%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	10.3%	2.7%	0.9%	1.7%
All other Centres / stores		12.5%	18.4%	26.7%	32.3%	15.1%	51.3%	66.0%	35.7%	57.5%	58.0%	32.2%	36.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		31.0%	26.9%	36.8%	34.1%	36.3%	33.8%	26.7%	32.7%	39.7%	42.0%	32.1%	33.7%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 7: FURNITURE, CARPETS, OTHER FLOOR COVERINGS AND HOUSEHOLD TEXTILES - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

			Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)														
Town Centre	DOVER		28.2%	23.8%	11.1%	2.3%	4.4%	0.7%	1.3%	18.6%	0.0%	0.0%	11.4%	9.5%
	De Bradlei Wharf Designer Outlet		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
Edge-of Centre	Charlton SC		0.0%	3.2%	0.0%	0.0%	0.0%	0.9%	0.0%	2.5%	0.0%	0.0%	0.8%	0.7%
		Subtotal	28.2%	27.0%	11.1%	2.3%	4.4%	1.6%	1.3%	21.1%	1.0%	0.0%	12.2%	10.2%
DEAL (DISTRICT CENTRE)														
Town Centre	DEAL		0.0%	0.6%	4.9%	33.7%	39.0%	9.2%	0.0%	2.8%	0.0%	0.0%	12.5%	10.4%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)														
Town Centre	SANDWICH		0.0%	0.0%	0.0%	1.4%	0.0%	7.0%	0.0%	3.6%	0.0%	0.0%	1.6%	1.3%
AYLESHAM (RURAL SERVICE CENTRE)														
	RSC-AYLESHAM		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES														
	ASH		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES & HAMLETS														
	ALKHAM		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE														
Dover	Dover, Granville St (Carpetright/Halfords)		1.4%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.6%	0.5%
	B&Q, Honeywood Parkway, Whitfield		0.9%	6.7%	0.0%	0.9%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	1.0%	0.9%
	Homebase, Dover Business Park, Whitfield		3.1%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%
	Screwfix, Dover Business Park, Whitfield, Dover		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	3.6%	0.0%	0.0%	0.6%	0.5%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield		0.8%	0.6%	3.4%	0.0%	0.8%	0.7%	0.0%	1.1%	0.0%	0.0%	0.8%	0.7%
	Whitfield-Other		0.0%	2.6%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.8%
		Subtotal	6.2%	12.7%	14.0%	0.9%	0.8%	0.7%	2.1%	5.5%	0.0%	0.0%	4.6%	3.8%
Deal	Out-of-centre		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer		0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
		Subtotal	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
DOVER DISTRICT COUNCIL AREA			34.4%	40.3%	30.0%	39.0%	44.2%	18.5%	3.3%	33.0%	1.0%	0.0%	31.0%	25.8%
OTHER STORES OUTSIDE DDC AREA														
	Ashford		4.5%	0.0%	2.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	1.0%	1.2%
	Ashford- Ashford Designer Outlet		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westwood		10.6%	5.1%	10.9%	19.6%	9.7%	38.2%	12.8%	10.2%	1.8%	0.0%	14.9%	12.5%
	Canterbury		24.0%	10.7%	30.8%	8.5%	10.3%	18.8%	59.9%	36.3%	79.4%	25.4%	24.2%	28.1%
	Folkestone		4.3%	7.4%	3.5%	0.0%	1.0%	0.0%	1.0%	3.6%	0.0%	26.8%	2.4%	4.8%
	Margate		0.0%	0.0%	1.1%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
	Ramsgate		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER CENTRES / STORES:		0.0%	8.8%	5.6%	6.4%	0.0%	0.0%	0.0%	1.6%	5.8%	12.4%	2.4%	3.7%
All other Centres / stores			43.4%	32.1%	53.9%	35.4%	22.4%	57.0%	73.7%	51.7%	87.0%	68.0%	45.2%	50.4%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:			22.2%	27.7%	16.1%	25.6%	33.4%	24.5%	22.9%	15.3%	12.1%	32.0%	23.8%	23.8%
TOTAL			**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 8: **DIY GOODS, DECORATING SUPPLIES AND GARDEN PRODUCTS - 2017 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	3.2%	1.9%	1.7%	1.3%	3.9%	4.8%	0.0%	2.8%	0.0%	0.0%	2.5%	2.1%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	3.2%	1.9%	1.7%	1.3%	3.9%	4.8%	0.0%	2.8%	0.0%	0.0%	2.5%	2.1%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.0%	5.5%	9.9%	27.1%	1.7%	0.0%	0.6%	0.0%	0.0%	5.9%	4.9%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.8%	0.0%	0.0%	0.0%	0.7%	0.6%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.1%	0.1%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.5%	0.4%
	B&Q, Honeywood Parkway, Whitfield	75.8%	69.4%	56.4%	59.8%	37.5%	28.5%	21.2%	74.6%	5.8%	5.0%	52.8%	44.4%
	Homebase, Dover Business Park, Whitfield	5.5%	20.3%	13.3%	13.8%	11.8%	17.3%	1.5%	10.6%	2.2%	0.0%	11.5%	9.6%
	Screwfix, Dover Business Park, Whitfield, Dover	2.0%	0.6%	10.4%	0.7%	0.8%	2.1%	0.8%	0.6%	0.0%	0.0%	1.9%	1.6%
	Jewson, Coombe Valley Road, Dover	4.4%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	1.2%	1.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	4.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	0.0%	2.9%	2.6%	3.1%	0.0%	3.8%	0.8%	0.8%	0.0%	0.0%	1.6%	1.4%
	Whitfield-Other	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%	0.2%
	Subtotal	92.8%	93.9%	82.6%	77.3%	50.9%	56.7%	24.3%	90.3%	8.0%	5.0%	70.4%	59.1%
Deal	Out-of-centre	0.0%	0.0%	0.0%	2.4%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	2.4%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.5%
DOVER DISTRICT COUNCIL AREA		95.9%	95.7%	89.8%	90.9%	83.9%	67.5%	25.1%	94.5%	8.0%	5.0%	80.3%	67.2%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.2%	0.2%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westwood	0.0%	0.0%	1.4%	4.4%	3.7%	17.9%	15.2%	0.0%	0.0%	0.0%	5.5%	4.6%
	Canterbury	2.0%	0.0%	8.1%	0.7%	1.5%	4.5%	49.2%	2.1%	89.7%	7.1%	8.2%	14.4%
	Folkestone	2.0%	1.8%	0.8%	0.0%	1.2%	1.6%	0.0%	2.6%	0.0%	86.5%	1.3%	9.6%
	Margate	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	1.7%	0.0%	0.0%	0.0%	1.0%	0.8%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	0.7%	1.3%	0.0%	0.8%	0.0%	1.5%	0.7%	0.4%	0.5%
All other Centres / stores		4.1%	1.8%	10.2%	6.9%	13.5%	24.0%	67.7%	4.8%	91.2%	94.3%	16.7%	30.1%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		0.0%	2.5%	0.0%	2.2%	2.7%	8.5%	7.2%	0.8%	0.8%	0.7%	3.1%	2.7%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 9: **PERSONAL CARE, NON-ELECTRIC APPLIANCES, COSMETICS - 2017 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	88.6%	56.5%	29.3%	6.7%	0.7%	7.2%	0.0%	45.2%	0.0%	2.0%	31.5%	26.4%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	88.6%	56.5%	29.3%	6.7%	0.7%	7.2%	0.0%	45.2%	0.0%	2.0%	31.5%	26.4%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	1.1%	31.3%	74.9%	88.2%	25.0%	1.4%	3.9%	1.3%	0.0%	28.9%	24.1%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	4.4%	0.0%	0.0%	0.6%	22.9%	1.5%	0.0%	1.3%	0.0%	3.5%	3.0%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.8%	0.0%	0.0%	0.0%	1.7%	1.4%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%	0.0%	0.7%	1.4%	1.2%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	1.4%	0.9%	0.0%	0.0%	0.5%	0.4%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	14.0%	0.9%	0.0%	0.7%	1.8%	1.6%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.5%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	2.4%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	1.4%	27.2%	20.7%	4.6%	3.5%	21.1%	1.7%	25.7%	0.0%	0.0%	12.2%	10.1%
	Whitfield-Other	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.5%	0.5%
	Subtotal	1.8%	27.2%	29.1%	4.6%	4.2%	21.6%	1.7%	26.5%	0.0%	0.0%	13.1%	10.9%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
DOVER DISTRICT COUNCIL AREA		90.5%	89.2%	89.7%	86.7%	93.7%	78.4%	34.3%	76.5%	2.6%	2.7%	80.7%	67.5%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.1%	0.1%
	Ashford- Ashford Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westwood	0.0%	0.0%	0.7%	6.6%	1.8%	11.7%	2.3%	0.0%	0.0%	0.0%	2.9%	2.4%
	Canterbury	3.5%	5.2%	4.4%	0.0%	0.0%	5.7%	45.6%	9.5%	77.4%	8.3%	8.4%	12.9%
	Folkestone	2.9%	5.0%	0.0%	0.0%	0.0%	0.0%	0.8%	6.8%	0.9%	62.1%	2.1%	8.2%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.9%	0.0%	0.0%	0.0%	0.2%	0.2%
	ALL OTHER CENTRES / STORES:	0.5%	0.6%	0.0%	0.0%	0.6%	1.1%	1.4%	0.7%	12.7%	8.1%	0.6%	2.2%
All other Centres / stores		6.8%	10.8%	5.1%	6.6%	2.4%	19.2%	50.9%	17.9%	91.0%	78.5%	14.3%	26.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		2.7%	0.0%	5.2%	6.7%	3.9%	2.4%	14.7%	5.6%	6.4%	18.8%	5.0%	6.5%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 10: ALL OTHER GOODS (JEWLLERY,GLASSWARE, TABLEWARE HOUSEHOLD UTENSILS - 2017 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	16.4%	33.2%	7.8%	3.3%	0.0%	0.0%	3.9%	19.2%	0.0%	1.1%	10.2%	8.4%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edge-of Centre	Charlton SC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	16.4%	33.2%	7.8%	3.3%	0.0%	0.0%	3.9%	19.2%	0.0%	1.1%	10.2%	8.4%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.0%	0.9%	18.0%	21.1%	29.4%	21.0%	5.0%	6.7%	0.0%	0.0%	12.9%	10.4%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	0.0%	0.0%	0.0%	3.5%	2.3%	3.0%	0.0%	0.0%	0.0%	1.1%	0.9%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q, Honeywood Parkway, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Homebase, Dover Business Park, Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Screwfix, Dover Business Park, Whitfield, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Jewson, Coombe Valley Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	0.0%	10.2%	6.7%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	1.7%
	Whitfield-Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	10.2%	6.7%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	1.7%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
DOVER DISTRICT COUNCIL AREA		16.4%	44.3%	32.4%	27.8%	32.9%	23.3%	11.9%	25.9%	0.0%	1.1%	26.3%	21.5%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	6.3%	0.9%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	4.3%	1.2%	1.5%
	Ashford- Ashford Designer Outlet	6.9%	3.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	1.6%
	Westwood	0.0%	0.7%	1.4%	7.7%	6.4%	19.7%	16.0%	0.0%	0.0%	0.0%	6.3%	5.1%
	Canterbury	21.3%	32.5%	41.6%	37.4%	22.0%	32.3%	46.7%	47.6%	77.4%	16.0%	34.3%	35.3%
	Folkestone	8.4%	0.0%	5.0%	0.0%	1.9%	0.0%	1.4%	2.9%	0.0%	45.5%	2.6%	7.4%
	Margate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Ramsgate	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
	ALL OTHER CENTRES / STORES:	0.9%	10.2%	2.7%	2.0%	6.4%	2.1%	0.0%	1.6%	3.9%	4.3%	3.1%	3.3%
All other Centres / stores		43.8%	47.3%	56.2%	47.1%	36.7%	55.5%	65.4%	52.1%	81.3%	70.2%	49.6%	54.4%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:		39.7%	8.4%	11.3%	25.1%	30.4%	21.2%	22.7%	22.0%	18.7%	28.8%	24.0%	24.2%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

APPENDIX 7: FORECAST CONVENIENCE GOODS TURNOVER

Convenience Goods: Turnover (Excluding SFT) (£m)

TABLE 1: ALL CONVENIENCE GOODS - 2017 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Costcutter, Pencester Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Iceland, High Street, Dover	0.9%	0.2%	0.4%	0.8%	0.2%	0.0%	0.2%	0.6%	0.0%	0.0%	0.4%	0.4%
	Marks & Spencer, Biggin Street, Dover	2.3%	2.2%	1.7%	0.0%	0.0%	0.3%	0.3%	2.8%	0.0%	0.0%	1.2%	1.0%
	Spar, Folkestone Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.8%	1.9%	0.4%	0.0%	0.5%	0.0%	0.0%	1.8%	0.0%	0.0%	0.7%	0.6%
	Subtotal	4.0%	4.3%	2.5%	0.8%	0.7%	0.3%	0.4%	5.1%	0.0%	0.0%	2.4%	2.0%
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0%	0.0%	1.0%	0.5%	6.9%	0.4%	0.0%	0.0%	0.2%	0.0%	1.1%	1.0%
	Co-op, Queens Street, Deal	0.0%	0.0%	1.4%	0.6%	0.6%	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%	0.2%
	Iceland, Queen Street, Deal	0.0%	0.0%	0.7%	3.8%	6.8%	0.3%	0.2%	0.0%	0.0%	0.0%	1.5%	1.3%
	Marks & Spencer, High Street, Deal	0.0%	0.0%	3.1%	2.9%	5.7%	1.5%	0.7%	0.4%	0.0%	0.0%	1.7%	1.4%
	Sainsbury's Superstore, West Street, Deal	0.0%	0.5%	12.7%	36.6%	43.0%	12.6%	1.8%	0.4%	0.0%	0.0%	13.3%	11.3%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.2%	0.4%	1.0%	3.4%	10.2%	0.4%	0.2%	0.4%	0.5%	0.0%	2.1%	1.8%
	Subtotal	0.2%	0.8%	19.9%	47.9%	73.2%	15.1%	2.9%	1.4%	0.7%	0.0%	20.1%	17.0%
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0%	0.0%	0.0%	0.0%	0.5%	0.9%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
	Co-op, Moat Sole Road, Sandwich	0.0%	0.0%	0.0%	0.0%	0.2%	19.0%	4.1%	0.7%	0.7%	0.0%	2.9%	2.5%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.5%	3.8%	2.0%	0.0%	0.0%	0.0%	0.8%	0.6%
	Subtotal	0.0%	0.0%	0.0%	0.0%	1.1%	23.8%	6.1%	0.7%	0.7%	0.0%	3.8%	3.3%
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	1.7%	0.0%	1.0%	0.9%
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.2%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.7%	0.0%	1.7%	0.0%	1.1%	1.1%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	0.7%	0.6%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%	0.1%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	2.6%	0.4%	0.5%	0.6%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	10.0%	1.0%	2.6%	0.4%	1.4%	1.4%
VILLAGES & HAMLETS													
	ELHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.9%	0.0%	0.1%
	KINGSDOWN	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	PRESTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	ST.MARGARET'S AT CLIFFE	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%
	Subtotal	0.0%	0.0%	5.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.9%	0.4%	0.4%
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	25.8%	18.4%	11.3%	11.1%	4.1%	9.1%	1.4%	24.7%	0.0%	0.5%	14.1%	12.0%
	Asda Supermarket, Charlton Green, Dover	9.4%	4.6%	3.3%	0.4%	3.8%	0.0%	0.7%	1.6%	0.5%	0.0%	3.3%	2.9%
	Co-op, Lower Road, River, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	0.0%	0.0%	1.1%	1.0%
	Costcutter, Sheriden Road, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Farm Foods, Charlton Green, Dover	0.4%	0.0%	0.6%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
	Morrisons, Bridge Street, Dover	35.2%	19.6%	9.6%	3.0%	2.4%	2.4%	0.3%	15.2%	0.3%	1.9%	12.3%	10.6%
	Spar, Townwall Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	15.2%	40.9%	37.0%	14.3%	4.2%	23.1%	15.1%	32.4%	1.5%	2.2%	21.1%	18.2%
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0%	4.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	1.7%	0.0%	0.5%	8.9%	3.2%	2.7%	0.0%	0.0%	0.0%	0.0%	2.3%	1.9%
	Co-op, Lord Warden, Hamilton Road, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco Express, Mill Hill, Deal	1.0%	0.3%	3.0%	5.6%	2.7%	1.2%	0.0%	0.0%	0.0%	0.0%	1.7%	1.4%
	Walmer-Local Stores	0.0%	0.0%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Sandwich	N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	88.6%	88.6%	65.7%	43.8%	20.8%	38.8%	17.5%	82.0%	2.3%	4.5%	56.7%	48.5%
DOVER DISTRICT COUNCIL AREA		92.8%	93.7%	93.3%	92.5%	95.8%	78.5%	47.0%	90.2%	7.9%	5.8%	85.9%	73.6%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.4%	0.1%	0.1%
	Broadstairs / Westwood	0.3%	0.0%	2.2%	1.9%	1.4%	8.1%	2.9%	0.2%	0.9%	0.0%	2.0%	1.7%
	Canterbury	1.8%	2.4%	2.2%	2.6%	0.7%	3.3%	41.6%	3.9%	88.6%	4.1%	7.0%	11.7%
	Folkestone	4.6%	3.9%	1.7%	0.0%	0.0%	0.3%	0.4%	4.5%	0.5%	63.6%	2.1%	7.7%
	Hawkinge	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%	0.4%	0.0%	0.6%	23.4%	0.1%	2.3%
	Hythe	0.0%	0.0%	0.2%	0.6%	0.0%	0.1%	0.0%	0.4%	0.0%	1.9%	0.1%	0.3%
	Margate	0.0%	0.0%	0.0%	0.0%	1.8%	1.2%	0.4%	0.0%	0.0%	0.0%	0.4%	0.4%
	Ramsgate	0.0%	0.0%	0.3%	1.0%	0.0%	8.2%	5.4%	0.3%	0.0%	0.0%	1.8%	1.5%
ALL OTHER CENTRES / STORES:		0.1%	0.0%	0.3%	1.4%	0.0%	0.3%	1.5%	0.6%	1.3%	0.8%	0.5%	0.6%
All other Centres / stores		7.2%	6.3%	6.7%	7.5%	4.2%	21.5%	53.0%	9.8%	92.1%	94.2%	14.1%	26.4%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

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TABLE 2: **2017 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	47.0	27.8	17.6	35.1	35.9	30.8	30.4	35.1	19.5	28.9	259.7	308.1
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Costcutter, Pencester Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Iceland, High Street, Dover	0.4	0.0	0.1	0.3	0.1	0.0	0.0	0.2	0.0	0.0	1.1	1.1
	Marks & Spencer, Biggin Street, Dover	1.1	0.6	0.3	0.0	0.0	0.1	0.1	1.0	0.0	0.0	3.2	3.2
	Spar, Folkestone Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.4	0.5	0.1	0.0	0.2	0.0	0.0	0.6	0.0	0.0	1.8	1.8
	Subtotal	1.9	1.2	0.4	0.3	0.3	0.1	0.1	1.8	0.0	0.0	6.1	6.1
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0	0.0	0.2	0.2	2.5	0.1	0.0	0.0	0.0	0.0	3.0	3.0
	Co-op, Queens Street, Deal	0.0	0.0	0.2	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.8	0.8
	Iceland, Queen Street, Deal	0.0	0.0	0.1	1.3	2.4	0.1	0.1	0.0	0.0	0.0	4.0	4.0
	Marks & Spencer, High Street, Deal	0.0	0.0	0.6	1.0	2.0	0.4	0.2	0.1	0.0	0.0	4.4	4.4
	Sainsbury's Superstore, West Street, Deal	0.0	0.1	2.2	12.8	15.4	3.9	0.5	0.2	0.0	0.0	34.6	34.7
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.1	0.1	0.2	1.2	3.7	0.1	0.0	0.1	0.1	0.0	5.5	5.6
	Subtotal	0.1	0.2	3.5	16.8	26.3	4.6	0.9	0.5	0.1	0.0	52.1	52.4
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.4	0.5
	Co-op, Moat Sole Road, Sandwich	0.0	0.0	0.0	0.0	0.1	5.9	1.2	0.2	0.1	0.0	7.5	7.6
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.2	1.2	0.6	0.0	0.0	0.0	2.0	2.0
	Subtotal	0.0	0.0	0.0	0.0	0.4	7.3	1.9	0.2	0.1	0.0	9.9	10.1
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.3	0.0	2.5	2.8
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.4
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.3	0.0	2.9	3.3
LOCAL CENTRES													
	ASH	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	1.8	1.8
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.4
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.5	0.1	1.2	1.8
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.2	3.0	0.4	0.5	0.1	3.6	4.2
VILLAGES & HAMLETS													
	ELHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.1	0.3
	KINGSDOWN	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
	PRESTON	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ST.MARGARET'S AT CLIFFE	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9
	Subtotal	0.0	0.0	0.9	0.0	0.0	0.0	0.1	0.0	0.0	0.3	1.1	1.3
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	12.1	5.1	2.0	3.9	1.5	2.8	0.4	8.7	0.0	0.1	36.7	36.9
	Asda Supermarket, Charlton Green, Dover	4.4	1.3	0.6	0.2	1.4	0.0	0.2	0.6	0.1	0.0	8.7	8.8
	Co-op, Lower Road, River, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.0	2.9	2.9
	Costcutter, Sheriden Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Farm Foods, Charlton Green, Dover	0.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Morrisons, Bridge Street, Dover	16.5	5.5	1.7	1.1	0.9	0.7	0.1	5.3	0.1	0.5	32.1	32.8
	Spar, Townwall Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	7.1	11.4	6.5	5.0	1.5	7.1	4.6	11.4	0.3	0.6	54.9	56.0
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.3
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.8	0.0	0.1	3.1	1.2	0.8	0.0	0.0	0.0	0.0	5.9	5.9
	Co-op, Lord Warden, Hamilton Road, Deal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Express, Mill Hill, Deal	0.4	0.1	0.5	2.0	1.0	0.4	0.0	0.0	0.0	0.0	4.3	4.3
	Walmer-Local Stores	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Sandwich	N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Subtotal	41.6	24.6	11.6	15.3	7.5	12.0	5.3	28.8	0.4	1.3	147.3	149.5
DOVER DISTRICT COUNCIL AREA		43.6	26.0	16.5	32.5	34.4	24.2	14.3	31.7	1.5	1.7	223.0	226.9
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.2	0.4
	Broadstairs / Westwood	0.1	0.0	0.4	0.7	0.5	2.5	0.9	0.1	0.2	0.0	5.2	5.3
	Canterbury	0.8	0.7	0.4	0.9	0.3	1.0	12.7	1.4	17.3	1.2	18.1	36.1
	Folkestone	2.2	1.1	0.3	0.0	0.0	0.1	0.1	1.6	0.1	18.4	5.4	23.7
	Hawkinge	0.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	6.8	0.2	7.1
	Hythe	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.5	0.4	0.9
	Margate	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.0	0.0	0.0	1.2	1.2
	Ramsgate	0.0	0.0	0.0	0.3	0.0	2.5	1.6	0.1	0.0	0.0	4.6	4.7
ALL OTHER CENTRES / STORES:		0.1	0.0	0.0	0.5	0.0	0.1	0.4	0.2	0.2	0.2	1.4	1.8
All other Centres / stores		3.4	1.7	1.2	2.6	1.5	6.6	16.1	3.4	18.0	27.2	36.7	81.2
TOTAL		**47.0**	**27.8**	**17.6**	**35.1**	**35.9**	**30.8**	**30.4**	**35.1**	**19.5**	**28.9**	**259.7**	**308.1**

TABLE 3: 2022 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	**47.9**	**28.4**	**17.9**	**35.4**	**36.5**	**31.2**	**31.1**	**35.9**	**19.9**	**29.7**	**264.3**	**313.9**
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)												
Co-op, Castle Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Costcutter, Pencester Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Iceland, High Street, Dover	0.4	0.0	0.1	0.3	0.1	0.0	0.0	0.2	0.0	0.0	1.2	1.2
Marks & Spencer, Biggin Street, Dover	1.1	0.6	0.3	0.0	0.0	0.1	0.1	1.0	0.0	0.0	3.3	3.3
Spar, Folkestone Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.4	0.5	0.1	0.0	0.2	0.0	0.0	0.6	0.0	0.0	1.8	1.8
Subtotal	1.9	1.2	0.4	0.3	0.3	0.1	0.1	1.8	0.0	0.0	6.2	6.3
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)												
Co-op, Park Street, Deal	0.0	0.0	0.2	0.2	2.5	0.1	0.0	0.0	0.0	0.0	3.0	3.1
Co-op, Queens Street, Deal	0.0	0.0	0.2	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.8	0.8
Iceland, Queen Street, Deal	0.0	0.0	0.1	1.4	2.5	0.1	0.1	0.0	0.0	0.0	4.0	4.0
Marks & Spencer, High Street, Deal	0.0	0.0	0.6	1.0	2.1	0.5	0.2	0.1	0.0	0.0	4.4	4.5
Sainsbury's Superstore, West Street, Deal	0.0	0.1	2.3	12.9	15.7	3.9	0.6	0.2	0.0	0.0	35.2	35.3
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.1	0.1	0.2	1.2	3.7	0.1	0.0	0.1	0.1	0.0	5.6	5.7
Subtotal	0.1	0.2	3.6	17.0	26.7	4.7	0.9	0.5	0.1	0.0	53.0	53.4
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)												
Spar, Market Street, Sandwich	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.5	0.5
Co-op, Moat Sole Road, Sandwich	0.0	0.0	0.0	0.0	0.1	5.9	1.3	0.2	0.1	0.0	7.6	7.8
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.2	1.2	0.6	0.0	0.0	0.0	2.0	2.0
Subtotal	0.0	0.0	0.0	0.0	0.4	7.4	1.9	0.2	0.1	0.0	10.1	10.3
AYLESHAM (RURAL SERVICE CENTRE)												
Co-op, Market Square, Aylesham	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.3	0.0	2.5	2.9
OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.4
Subtotal	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.3	0.0	3.0	3.3
LOCAL CENTRES												
ASH	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	1.8	1.8
CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.4
WINGHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.5	0.1	1.3	1.9
Subtotal	0.0	0.0	0.0	0.0	0.0	0.2	3.1	0.4	0.5	0.1	3.6	4.2
VILLAGES & HAMLETS												
ELHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.1	0.3
KINGSDOWN	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
PRESTON	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ST.MARGARET'S AT CLIFFE	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9
Subtotal	0.0	0.0	0.9	0.0	0.0	0.0	0.1	0.0	0.0	0.3	1.1	1.4
OUT-OF-CENTRE												
Dover Aldi, Cherry Tree Avenue, Dover	12.3	5.2	2.0	3.9	1.5	2.8	0.4	8.9	0.0	0.1	37.3	37.6
Asda Supermarket, Charlton Green, Dover	4.5	1.3	0.6	0.2	1.4	0.0	0.2	0.6	0.1	0.0	8.8	9.0
Co-op, Lower Road, River, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.0	3.0	3.0
Costcutter, Sheriden Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Farm Foods, Charlton Green, Dover	0.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.5
Morrisons, Bridge Street, Dover	16.8	5.6	1.7	1.1	0.9	0.8	0.1	5.5	0.1	0.6	32.6	33.4
Spar, Townwall Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Extra, White Cliffs Business Park, Whitfield, Dover	7.3	11.6	6.6	5.0	1.5	7.2	4.7	11.7	0.3	0.7	55.9	57.0
Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	1.4
Deal Co-op, Beauchamp Avenue, Mill Hill, Deal	0.8	0.0	0.1	3.2	1.2	0.8	0.0	0.0	0.0	0.0	6.0	6.0
Co-op, Lord Warden, Hamilton Road, Deal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Mill Hill, Deal	0.5	0.1	0.5	2.0	1.0	0.4	0.0	0.0	0.0	0.0	4.4	4.4
Walmer-Local Stores	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Sandwich	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Subtotal	42.4	25.2	11.8	15.5	7.6	12.1	5.4	29.5	0.4	1.3	150.0	152.4
DOVER DISTRICT COUNCIL AREA	44.4	26.6	16.7	32.7	34.9	24.5	14.6	32.4	1.6	1.7	227.0	231.2
OTHER STORES OUTSIDE DDC AREA												
Ashford	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.2	0.4
Broadstairs / Westwood	0.1	0.0	0.4	0.7	0.5	2.5	0.9	0.1	0.2	0.0	5.3	5.4
Canterbury	0.9	0.7	0.4	0.9	0.3	1.0	13.0	1.4	17.6	1.2	18.4	36.8
Folkestone	2.2	1.1	0.3	0.0	0.0	0.1	0.1	1.6	0.1	18.9	5.5	24.2
Hawkinge	0.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	7.0	0.2	7.2
Hythe	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.6	0.4	1.0
Margate	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.0	0.0	0.0	1.2	1.2
Ramsgate	0.0	0.0	0.0	0.3	0.0	2.5	1.7	0.1	0.0	0.0	4.7	4.7
ALL OTHER CENTRES / STORES:	0.1	0.0	0.0	0.5	0.0	0.1	0.5	0.2	0.3	0.2	1.4	1.9
All other Centres / stores	3.4	1.8	1.2	2.6	1.5	6.7	16.5	3.5	18.3	28.0	37.3	82.7
TOTAL	**47.9**	**28.4**	**17.9**	**35.4**	**36.5**	**31.2**	**31.1**	**35.9**	**19.9**	**29.7**	**264.3**	**313.9**

TABLE 4: 2027 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	49.3	29.2	18.4	36.2	37.6	31.9	32.4	37.1	20.8	31.1	272.2	324.1
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Costcutter, Pencester Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Iceland, High Street, Dover	0.4	0.0	0.1	0.3	0.1	0.0	0.0	0.2	0.0	0.0	1.2	1.2
	Marks & Spencer, Biggin Street, Dover	1.2	0.7	0.3	0.0	0.0	0.1	0.1	1.0	0.0	0.0	3.4	3.4
	Spar, Folkestone Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.4	0.5	0.1	0.0	0.2	0.0	0.0	0.7	0.0	0.0	1.9	1.9
	Subtotal	2.0	1.3	0.5	0.3	0.3	0.1	0.1	1.9	0.0	0.0	6.4	6.5
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0	0.0	0.2	0.2	2.6	0.1	0.0	0.0	0.0	0.0	3.1	3.2
	Co-op, Queens Street, Deal	0.0	0.0	0.2	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.8	0.8
	Iceland, Queen Street, Deal	0.0	0.0	0.1	1.4	2.5	0.1	0.1	0.0	0.0	0.0	4.2	4.2
	Marks & Spencer, High Street, Deal	0.0	0.0	0.6	1.1	2.1	0.5	0.2	0.1	0.0	0.0	4.6	4.6
	Sainsbury's Superstore, West Street, Deal	0.0	0.1	2.3	13.3	16.1	4.0	0.6	0.2	0.0	0.0	36.2	36.5
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.1	0.1	0.2	1.2	3.8	0.1	0.1	0.1	0.1	0.0	5.8	5.9
	Subtotal	0.1	0.2	3.7	17.4	27.5	4.8	0.9	0.5	0.1	0.0	54.6	55.1
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.5	0.5
	Co-op, Moat Sole Road, Sandwich	0.0	0.0	0.0	0.0	0.1	6.1	1.3	0.3	0.2	0.0	7.8	8.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.2	1.2	0.7	0.0	0.0	0.0	2.1	2.1
	Subtotal	0.0	0.0	0.0	0.0	0.4	7.6	2.0	0.3	0.2	0.0	10.4	10.6
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.3	0.0	2.6	3.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.5
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.3	0.0	3.1	3.4
LOCAL CENTRES													
	ASH	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	1.9	1.9
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.4
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.5	0.1	1.3	1.9
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.2	3.2	0.4	0.5	0.1	3.7	4.4
VILLAGES & HAMLETS													
	ELHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.1	0.4
	KINGSDOWN	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
	PRESTON	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1
	ST.MARGARET'S AT CLIFFE	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9
	Subtotal	0.0	0.0	1.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	1.1	1.4
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	12.7	5.4	2.1	4.0	1.5	2.9	0.5	9.2	0.0	0.1	38.5	38.9
	Asda Supermarket, Charlton Green, Dover	4.6	1.4	0.6	0.2	1.4	0.0	0.2	0.6	0.1	0.0	9.1	9.3
	Co-op, Lower Road, River, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	3.1	3.1
	Costcutter, Sheriden Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Farm Foods, Charlton Green, Dover	0.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Morrisons, Bridge Street, Dover	17.3	5.7	1.8	1.1	0.9	0.8	0.1	5.6	0.1	0.6	33.6	34.5
	Spar, Townwall Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	7.5	12.0	6.8	5.2	1.6	7.4	4.9	12.0	0.3	0.7	57.5	58.9
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	1.4
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.8	0.0	0.1	3.2	1.2	0.9	0.0	0.0	0.0	0.0	6.1	6.2
	Co-op, Lord Warden, Hamilton Road, Deal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Express, Mill Hill, Deal	0.5	0.1	0.6	2.0	1.0	0.4	0.0	0.0	0.0	0.0	4.5	4.5
	Walmer-Local Stores	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Sandwich	N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Subtotal	43.7	25.9	12.1	15.9	7.8	12.4	5.7	30.4	0.5	1.4	154.4	157.3
DOVER DISTRICT COUNCIL AREA		45.8	27.4	17.2	33.5	36.0	25.1	15.2	33.5	1.6	1.8	233.8	238.7
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.2	0.4
	Broadstairs / Westwood	0.2	0.0	0.4	0.7	0.5	2.6	1.0	0.1	0.2	0.0	5.4	5.6
	Canterbury	0.9	0.7	0.4	0.9	0.3	1.0	13.5	1.4	18.5	1.3	18.9	38.0
	Folkestone	2.3	1.1	0.3	0.0	0.0	0.1	0.1	1.7	0.1	19.8	5.6	25.0
	Hawkinge	0.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	7.3	0.3	7.4
	Hythe	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.6	0.4	1.0
	Margate	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.0	0.0	0.0	1.2	1.2
	Ramsgate	0.0	0.0	0.1	0.4	0.0	2.6	1.7	0.1	0.0	0.0	4.9	4.9
ALL OTHER CENTRES / STORES:		0.1	0.0	0.0	0.5	0.0	0.1	0.5	0.2	0.3	0.2	1.4	1.9
All other Centres / stores		3.5	1.8	1.2	2.7	1.6	6.9	17.2	3.6	19.2	29.3	38.4	85.4
TOTAL		**49.3**	**29.2**	**18.4**	**36.2**	**37.6**	**31.9**	**32.4**	**37.1**	**20.8**	**31.1**	**272.2**	**324.1**

TABLE 5: **2032 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	51.0	30.1	18.8	37.1	38.4	32.9	33.5	38.1	21.8	32.6	280.0	334.4
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Costcutter, Pencester Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Iceland, High Street, Dover	0.5	0.0	0.1	0.3	0.1	0.0	0.1	0.2	0.0	0.0	1.2	1.2
	Marks & Spencer, Biggin Street, Dover	1.2	0.7	0.3	0.0	0.0	0.1	0.1	1.0	0.0	0.0	3.4	3.5
	Spar, Folkestone Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.4	0.6	0.1	0.0	0.2	0.0	0.0	0.7	0.0	0.0	1.9	2.0
	Subtotal	2.1	1.3	0.5	0.3	0.3	0.1	0.1	1.9	0.0	0.0	6.6	6.7
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0	0.0	0.2	0.2	2.7	0.1	0.0	0.0	0.0	0.0	3.2	3.3
	Co-op, Queens Street, Deal	0.0	0.0	0.3	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.8	0.8
	Iceland, Queen Street, Deal	0.0	0.0	0.1	1.4	2.6	0.1	0.1	0.0	0.0	0.0	4.3	4.3
	Marks & Spencer, High Street, Deal	0.0	0.0	0.6	1.1	2.2	0.5	0.2	0.1	0.0	0.0	4.7	4.8
	Sainsbury's Superstore, West Street, Deal	0.0	0.1	2.4	13.6	16.5	4.1	0.6	0.2	0.0	0.0	37.3	37.6
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.1	0.1	0.2	1.3	3.9	0.1	0.1	0.1	0.1	0.0	5.9	6.1
	Subtotal	0.1	0.2	3.7	17.8	28.1	5.0	1.0	0.5	0.1	0.0	56.2	56.8
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.5	0.5
	Co-op, Moat Sole Road, Sandwich	0.0	0.0	0.0	0.0	0.1	6.3	1.4	0.3	0.2	0.0	8.1	8.3
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.2	1.3	0.7	0.0	0.0	0.0	2.2	2.2
	Subtotal	0.0	0.0	0.0	0.0	0.4	7.8	2.0	0.3	0.2	0.0	10.7	10.9
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.4	0.0	2.7	3.1
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.5
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.4	0.0	3.2	3.5
LOCAL CENTRES													
	ASH	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	1.9	1.9
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.4
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.6	0.1	1.3	2.0
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.2	3.3	0.4	0.6	0.1	3.8	4.5
VILLAGES & HAMLETS													
	ELHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.1	0.4
	KINGSDOWN	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
	PRESTON	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.1
	ST.MARGARET'S AT CLIFFE	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9
	Subtotal	0.0	0.0	1.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	1.2	1.4
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	13.1	5.6	2.1	4.1	1.6	3.0	0.5	9.4	0.0	0.1	39.6	40.1
	Asda Supermarket, Charlton Green, Dover	4.8	1.4	0.6	0.2	1.5	0.0	0.2	0.6	0.1	0.0	9.4	9.5
	Co-op, Lower Road, River, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	3.1	3.2
	Costcutter, Sheriden Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Farm Foods, Charlton Green, Dover	0.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Morrisons, Bridge Street, Dover	17.9	5.9	1.8	1.1	0.9	0.8	0.1	5.8	0.1	0.6	34.6	35.6
	Spar, Townwall Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	7.8	12.3	7.0	5.3	1.6	7.6	5.0	12.4	0.3	0.7	59.2	60.7
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	1.4
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.9	0.0	0.1	3.3	1.2	0.9	0.0	0.0	0.0	0.0	6.3	6.4
	Co-op, Lord Warden, Hamilton Road, Deal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Express, Mill Hill, Deal	0.5	0.1	0.6	2.1	1.1	0.4	0.0	0.0	0.0	0.0	4.6	4.7
	Walmer-Local Stores	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Sandwich	N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Subtotal	45.2	26.7	12.4	16.3	8.0	12.8	5.9	31.2	0.5	1.5	158.8	162.3
DOVER DISTRICT COUNCIL AREA		47.4	28.2	17.5	34.4	36.8	25.8	15.7	34.4	1.7	1.9	240.5	246.3
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.3	0.4
	Broadstairs / Westwood	0.2	0.0	0.4	0.7	0.5	2.7	1.0	0.1	0.2	0.0	5.6	5.8
	Canterbury	0.9	0.7	0.4	1.0	0.3	1.1	14.0	1.5	19.4	1.3	19.5	39.2
	Folkestone	2.3	1.2	0.3	0.0	0.0	0.1	0.1	1.7	0.1	20.7	5.8	25.7
	Hawkinge	0.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	7.6	0.3	7.7
	Hythe	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.6	0.4	1.0
	Margate	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.0	0.0	0.0	1.3	1.3
	Ramsgate	0.0	0.0	0.1	0.4	0.0	2.7	1.8	0.1	0.0	0.0	5.0	5.1
ALL OTHER CENTRES / STORES:		0.1	0.0	0.0	0.5	0.0	0.1	0.5	0.2	0.3	0.3	1.5	2.0
All other Centres / stores		3.7	1.9	1.3	2.8	1.6	7.1	17.8	3.7	20.1	30.7	39.5	88.1
TOTAL		**51.0**	**30.1**	**18.8**	**37.1**	**38.4**	**32.9**	**33.5**	**38.1**	**21.8**	**32.6**	**280.0**	**334.4**

TABLE 6: 2037 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	**52.9**	**31.1**	**19.1**	**38.0**	**39.3**	**33.7**	**34.7**	**39.1**	**22.7**	**34.0**	**287.9**	**344.6**
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)													
	Co-op, Castle Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Costcutter, Pencester Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Iceland, High Street, Dover	0.5	0.1	0.1	0.3	0.1	0.0	0.1	0.2	0.0	0.0	1.3	1.3
	Marks & Spencer, Biggin Street, Dover	1.2	0.7	0.3	0.0	0.0	0.1	0.1	1.1	0.0	0.0	3.5	3.6
	Spar, Folkestone Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.4	0.6	0.1	0.0	0.2	0.0	0.0	0.7	0.0	0.0	2.0	2.0
	Subtotal	2.1	1.3	0.5	0.3	0.3	0.1	0.2	2.0	0.0	0.0	6.8	6.9
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)													
	Co-op, Park Street, Deal	0.0	0.0	0.2	0.2	2.7	0.1	0.0	0.0	0.0	0.0	3.3	3.4
	Co-op, Queens Street, Deal	0.0	0.0	0.3	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.8	0.8
	Iceland, Queen Street, Deal	0.0	0.0	0.1	1.5	2.7	0.1	0.1	0.0	0.0	0.0	4.4	4.4
	Marks & Spencer, High Street, Deal	0.0	0.0	0.6	1.1	2.2	0.5	0.3	0.1	0.0	0.0	4.8	4.9
	Sainsbury's Superstore, West Street, Deal	0.0	0.1	2.4	13.9	16.9	4.2	0.6	0.2	0.0	0.0	38.3	38.8
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.1	0.1	0.2	1.3	4.0	0.1	0.1	0.1	0.1	0.0	6.1	6.3
	Subtotal	0.1	0.3	3.8	18.2	28.8	5.1	1.0	0.6	0.2	0.0	57.7	58.6
SANDWICH TOWN & EDGE OF CENTRE (RURAL SERVICE CENTRE)													
	Spar, Market Street, Sandwich	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.5	0.5
	Co-op, Moat Sole Road, Sandwich	0.0	0.0	0.0	0.0	0.1	6.4	1.4	0.3	0.2	0.0	8.3	8.5
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.2	1.3	0.7	0.0	0.0	0.0	2.2	2.2
	Subtotal	0.0	0.0	0.0	0.0	0.4	8.0	2.1	0.3	0.2	0.0	11.0	11.3
AYLESHAM (RURAL SERVICE CENTRE)													
	Co-op, Market Square, Aylesham	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.4	0.0	2.8	3.2
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.5	0.5
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.4	0.0	3.3	3.6
LOCAL CENTRES													
	ASH	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	2.0	2.0
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.4	0.4
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.6	0.1	1.4	2.0
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.2	3.5	0.4	0.6	0.1	4.0	4.7
VILLAGES & HAMLETS													
	ELHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.3	0.1	0.4
	KINGSDOWN	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
	PRESTON	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.1
	ST.MARGARET'S AT CLIFFE	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	1.0
	Subtotal	0.0	0.0	1.0	0.0	0.0	0.0	0.2	0.0	0.0	0.3	1.2	1.5
OUT-OF-CENTRE													
Dover	Aldi, Cherry Tree Avenue, Dover	13.6	5.7	2.2	4.2	1.6	3.1	0.5	9.7	0.0	0.2	40.7	41.3
	Asda Supermarket, Charlton Green, Dover	5.0	1.4	0.6	0.2	1.5	0.0	0.3	0.6	0.1	0.0	9.6	9.8
	Co-op, Lower Road, River, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.2	3.3
	Costcutter, Sheriden Road, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Farm Foods, Charlton Green, Dover	0.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Morrisons, Bridge Street, Dover	18.6	6.1	1.8	1.2	0.9	0.8	0.1	5.9	0.1	0.6	35.5	36.7
	Spar, Townwall Street, Dover	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	8.0	12.7	7.1	5.4	1.7	7.8	5.2	12.7	0.3	0.7	60.8	62.6
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	1.5
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	0.9	0.0	0.1	3.4	1.3	0.9	0.0	0.0	0.0	0.0	6.5	6.6
	Co-op, Lord Warden, Hamilton Road, Deal	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Tesco Express, Mill Hill, Deal	0.5	0.1	0.6	2.1	1.1	0.4	0.0	0.0	0.0	0.0	4.8	4.8
	Walmer-Local Stores	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Sandwich	N/A	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Subtotal	46.8	27.6	12.5	16.6	8.2	13.1	6.1	32.1	0.5	1.5	163.3	167.2
DOVER DISTRICT COUNCIL AREA		49.1	29.1	17.8	35.2	37.7	26.4	16.3	35.3	1.8	2.0	247.2	253.8
OTHER STORES OUTSIDE DDC AREA													
	Ashford	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.3	0.4
	Broadstairs / Westwood	0.2	0.0	0.4	0.7	0.6	2.7	1.0	0.1	0.2	0.0	5.7	6.0
	Canterbury	0.9	0.7	0.4	1.0	0.3	1.1	14.4	1.5	20.1	1.4	20.0	40.4
	Folkestone	2.4	1.2	0.3	0.0	0.0	0.1	0.1	1.7	0.1	21.6	6.0	26.5
	Hawkinge	0.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.1	8.0	0.3	7.9
	Hythe	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.6	0.4	1.0
	Margate	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.0	0.0	0.0	1.3	1.3
	Ramsgate	0.0	0.0	0.1	0.4	0.0	2.8	1.9	0.1	0.0	0.0	5.1	5.2
ALL OTHER CENTRES / STORES:		0.1	0.0	0.0	0.5	0.0	0.1	0.5	0.3	0.3	0.3	1.5	2.0
All other Centres / stores		3.8	2.0	1.3	2.8	1.6	7.2	18.4	3.8	20.9	32.0	40.6	90.8
TOTAL		**52.9**	**31.1**	**19.1**	**38.0**	**39.3**	**33.7**	**34.7**	**39.1**	**22.7**	**34.0**	**287.9**	**344.6**

APPENDIX 8: FORECAST COMPARISON GOODS TURNOVER

Comparison Goods: Turnover (Excluding SFT) (£m)

TABLE 1: ALL COMPARISON GOODS - 2017 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	43.0%	36.8%	14.3%	5.0%	3.9%	2.7%	1.7%	22.9%	0.6%	0.8%	16.8%	14.0%
	De Bradlei Wharf Designer Outlet	0.0%	0.0%	0.2%	0.0%	0.0%	0.2%	0.0%	0.2%	0.4%	0.0%	0.1%	0.1%
Edge-of Centre	Charlton SC	0.2%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	0.0%	0.0%	0.2%	0.1%
	Subtotal	43.2%	37.2%	14.6%	5.0%	3.9%	3.0%	1.7%	23.5%	1.0%	0.8%	17.0%	14.2%
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	1.0%	0.7%	14.4%	29.0%	52.0%	11.9%	1.6%	3.0%	0.2%	0.0%	14.6%	12.2%
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0%	2.2%	0.0%	0.6%	0.8%	8.7%	1.6%	0.6%	0.2%	0.0%	1.8%	1.5%
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.3%	0.3%
LOCAL CENTRES													
	ASH	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	2.2%	0.0%	0.3%	0.1%	0.3%	0.3%
	CAPEL-LE-FERNE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	EASTRY	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.2%	0.0%	0.0%	0.1%	0.1%
	SHEPHERDSWELL	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	WINGHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Subtotal	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	2.4%	0.2%	0.3%	0.1%	0.4%	0.4%
VILLAGES & HAMLETS													
	ALKHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.8%	0.4%	0.0%	0.0%	0.4%	0.0%	0.0%	0.4%	0.0%	0.0%	0.3%	0.2%
	B&Q, Honeywood Parkway, Whitfield	4.7%	5.2%	4.4%	4.2%	2.7%	2.2%	1.8%	5.7%	0.5%	0.3%	3.9%	3.3%
	Homebase, Dover Business Park, Whitfield	0.8%	1.3%	1.2%	0.9%	0.8%	1.4%	0.1%	0.8%	0.2%	0.0%	0.9%	0.8%
	Screwfix, Dover Business Park, Whitfield, Dover	0.1%	0.0%	0.8%	0.0%	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%
	Jewson, Coombe Valley Road, Dover	0.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	1.3%	0.6%	1.9%	0.3%	0.1%	0.1%	0.2%	0.9%	0.0%	0.0%	0.6%	0.5%
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	2.3%	8.0%	8.5%	5.4%	1.5%	7.2%	1.3%	11.1%	0.2%	0.0%	5.5%	4.6%
	Whitfield-Other	0.1%	0.4%	2.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%	0.2%
	Subtotal	10.4%	15.9%	19.6%	11.0%	5.5%	11.4%	3.4%	19.1%	0.8%	0.3%	11.7%	9.8%
Deal	Out-of-centre	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Walmer	0.0%	0.0%	0.0%	0.3%	0.2%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
	Subtotal	0.0%	0.0%	0.0%	0.5%	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
DOVER DISTRICT COUNCIL AREA		54.6%	56.1%	48.6%	46.1%	62.6%	35.8%	13.6%	46.6%	2.6%	1.3%	45.9%	38.4%
OTHER STORES OUTSIDE DDC AREA													
	Ashford	3.5%	1.2%	0.7%	0.4%	0.5%	0.2%	0.4%	0.5%	0.2%	5.0%	1.0%	1.4%
	Ashford- Ashford Designer Outlet	5.2%	0.5%	0.9%	0.0%	0.1%	0.1%	0.0%	1.1%	0.8%	0.5%	1.1%	1.0%
	Westwood	6.1%	3.8%	10.5%	32.7%	20.0%	37.6%	11.5%	5.5%	1.1%	0.5%	16.3%	13.6%
	Canterbury	16.7%	25.5%	33.0%	17.1%	13.3%	20.9%	70.2%	40.2%	86.8%	22.7%	28.6%	32.0%
	Folkestone	12.8%	7.9%	3.5%	0.4%	1.6%	0.2%	1.3%	5.1%	0.2%	63.8%	4.3%	10.1%
	Margate	0.2%	1.5%	0.2%	0.2%	0.6%	2.0%	0.4%	0.0%	0.0%	0.0%	0.6%	0.5%
	Ramsgate	0.0%	0.0%	0.6%	0.0%	0.0%	1.0%	1.2%	0.0%	0.0%	0.0%	0.3%	0.3%
	ALL OTHER CENTRES / STORES:	0.9%	3.5%	2.0%	3.0%	1.3%	2.2%	1.4%	1.0%	8.3%	6.3%	1.9%	2.7%
All other Centres / stores		45.4%	43.9%	51.4%	53.9%	37.4%	64.2%	86.4%	53.4%	97.4%	98.7%	54.1%	61.6%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TABLE 2: 2017 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	56.5	35.4	25.8	48.4	49.7	42.9	39.5	49.3	28.3	44.9	347.6	420.8
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	24.3	13.0	3.7	2.4	1.9	1.2	0.7	11.3	0.2	0.4	58.2	59.0
	De Bradlei Wharf Designer Outlet	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.1	0.1	0.0	0.2	0.4
Edge-of Centre	Charlton SC	0.1	0.2	0.0	0.0	0.0	0.1	0.0	0.2	0.0	0.0	0.5	0.5
	Subtotal	24.4	13.2	3.8	2.4	1.9	1.3	0.7	11.6	0.3	0.4	59.0	59.9
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.5	0.2	3.7	14.1	25.9	5.1	0.6	1.5	0.1	0.0	50.9	51.2
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0	0.8	0.0	0.3	0.4	3.7	0.6	0.3	0.1	0.0	6.1	6.2
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	1.2	1.2
		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOCAL CENTRES		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ASH	0.0	0.0	0.0	0.0	0.0	0.1	0.9	0.0	0.1	0.1	1.0	1.2
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0	0.3	0.3
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.1
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.3	1.0	0.1	0.1	0.1	1.4	1.6
VILLAGES & HAMLETS													
	ALKHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.4	0.2	0.0	0.0	0.2	0.0	0.0	0.2	0.0	0.0	0.9	0.9
	B&Q, Honeywood Parkway, Whitfield	2.7	1.9	1.1	2.1	1.3	1.0	0.7	2.8	0.1	0.2	13.5	13.9
	Homebase, Dover Business Park, Whitfield	0.5	0.4	0.3	0.5	0.4	0.6	0.0	0.4	0.1	0.0	3.1	3.2
	Screwfix, Dover Business Park, Whitfield, Dover	0.1	0.0	0.2	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Jewson, Coombe Valley Road, Dover	0.1	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.3	0.3
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.8	0.2	0.5	0.2	0.0	0.0	0.1	0.4	0.0	0.0	2.2	2.2
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	1.3	2.9	2.2	2.6	0.8	3.1	0.5	5.5	0.1	0.0	19.0	19.1
	Whitfield-Other	0.0	0.1	0.7	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.0	1.0
	Subtotal	5.9	5.6	5.1	5.3	2.7	4.9	1.4	9.4	0.2	0.2	40.6	41.1
Deal	Out-of-centre	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.1
	Walmer	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.0	0.0	0.3	0.3
	Subtotal	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.5	0.5
DOVER DISTRICT COUNCIL AREA		30.8	19.9	12.6	22.3	31.1	15.4	5.4	23.0	0.7	0.6	159.7	161.6
OTHER STORES OUTSIDE DDC AREA													
	Ashford	2.0	0.4	0.2	0.2	0.2	0.1	0.2	0.3	0.1	2.2	3.5	5.7
	Ashford- Ashford Designer Outlet	2.9	0.2	0.2	0.0	0.1	0.0	0.0	0.5	0.2	0.2	3.9	4.3
	Westwood	3.4	1.3	2.7	15.8	9.9	16.1	4.5	2.7	0.3	0.2	56.6	57.4
	Canterbury	9.4	9.0	8.5	8.3	6.6	9.0	27.7	19.8	24.6	10.2	99.4	134.5
	Folkestone	7.2	2.8	0.9	0.2	0.8	0.1	0.5	2.5	0.0	28.6	14.9	42.5
	Margate	0.1	0.5	0.0	0.1	0.3	0.9	0.1	0.0	0.0	0.0	2.2	2.2
	Ramsgate	0.0	0.0	0.2	0.0	0.0	0.4	0.5	0.0	0.0	0.0	1.1	1.1
	ALL OTHER CENTRES / STORES:	0.5	1.2	0.5	1.5	0.7	0.9	0.6	0.5	2.3	2.8	6.4	11.6
All other Centres / stores		25.7	15.6	13.3	26.1	18.6	27.5	34.1	26.3	27.5	44.3	187.9	259.1
TOTAL		**56.5**	**35.4**	**25.8**	**48.4**	**49.7**	**42.9**	**39.5**	**49.3**	**28.3**	**44.9**	**347.6**	**420.8**

TABLE 3: **2022 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	63.5	39.9	28.9	53.8	55.6	47.8	44.6	55.6	31.7	50.9	389.8	472.3
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	27.3	14.7	4.1	2.7	2.2	1.3	0.8	12.7	0.2	0.4	65.3	66.2
	De Bradlei Wharf Designer Outlet	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.1	0.1	0.0	0.3	0.4
Edge-of Centre	Charlton SC	0.1	0.2	0.0	0.0	0.0	0.1	0.0	0.2	0.0	0.0	0.6	0.6
	Subtotal	27.4	14.9	4.2	2.7	2.2	1.4	0.8	13.1	0.3	0.4	66.2	67.2
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.6	0.3	4.2	15.6	28.9	5.7	0.7	1.7	0.1	0.0	57.1	57.4
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0	0.9	0.0	0.3	0.5	4.1	0.7	0.3	0.1	0.0	6.9	7.0
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3	1.3
		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOCAL CENTRES		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ASH	0.0	0.0	0.0	0.0	0.0	0.1	1.0	0.0	0.1	0.1	1.1	1.3
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.1	0.0	0.0	0.4	0.4
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.1
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.4	1.1	0.1	0.1	0.1	1.6	1.8
VILLAGES & HAMLETS													
	ALKHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.5	0.2	0.0	0.0	0.2	0.0	0.0	0.2	0.0	0.0	1.0	1.1
	B&Q, Honeywood Parkway, Whitfield	3.0	2.1	1.3	2.3	1.5	1.1	0.8	3.2	0.1	0.2	15.2	15.6
	Homebase, Dover Business Park, Whitfield	0.5	0.5	0.3	0.5	0.5	0.6	0.1	0.5	0.1	0.0	3.5	3.6
	Screwfix, Dover Business Park, Whitfield, Dover	0.1	0.0	0.2	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.5	0.5
	Jewson, Coombe Valley Road, Dover	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.3	0.3
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	0.9	0.2	0.5	0.2	0.0	0.0	0.1	0.5	0.0	0.0	2.5	2.5
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	1.5	3.2	2.5	2.9	0.8	3.4	0.6	6.2	0.1	0.0	21.3	21.5
	Whitfield-Other	0.0	0.1	0.8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.1	1.1
	Subtotal	6.6	6.4	5.7	5.9	3.1	5.5	1.5	10.7	0.3	0.2	45.5	46.2
Deal	Out-of-centre	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2
	Walmer	0.0	0.0	0.0	0.2	0.1	0.0	0.0	0.1	0.0	0.0	0.4	0.4
	Subtotal	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.1	0.0	0.0	0.5	0.5
DOVER DISTRICT COUNCIL AREA		34.6	22.4	14.1	24.8	34.8	17.1	6.1	25.9	0.8	0.7	179.1	181.4
OTHER STORES OUTSIDE DDC AREA													
	Ashford	2.2	0.5	0.2	0.2	0.3	0.1	0.2	0.3	0.1	2.5	3.9	6.4
	Ashford- Ashford Designer Outlet	3.3	0.2	0.2	0.0	0.1	0.0	0.0	0.6	0.3	0.2	4.3	4.9
	Westwood	3.9	1.5	3.0	17.6	11.1	18.0	5.1	3.1	0.4	0.2	63.5	64.4
	Canterbury	10.6	10.2	9.6	9.2	7.4	10.0	31.3	22.4	27.5	11.5	111.4	150.9
	Folkestone	8.1	3.2	1.0	0.2	0.9	0.1	0.6	2.8	0.1	32.4	16.7	47.7
	Margate	0.2	0.6	0.0	0.1	0.4	1.0	0.2	0.0	0.0	0.0	2.4	2.4
	Ramsgate	0.0	0.0	0.2	0.0	0.0	0.5	0.5	0.0	0.0	0.0	1.2	1.2
	ALL OTHER CENTRES / STORES:	0.6	1.4	0.6	1.6	0.7	1.0	0.6	0.6	2.6	3.2	7.2	13.0
All other Centres / stores		28.8	17.5	14.9	29.0	20.8	30.7	38.5	29.7	30.9	50.2	210.7	290.9
TOTAL		**63.5**	**39.9**	**28.9**	**53.8**	**55.6**	**47.8**	**44.6**	**55.6**	**31.7**	**50.9**	**389.8**	**472.3**

TABLE 4: **2027 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	75.9	47.7	34.5	64.0	66.5	56.8	53.8	66.7	38.6	61.9	466.0	566.4
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	32.6	17.6	5.0	3.2	2.6	1.5	0.9	15.3	0.2	0.5	78.1	79.4
	De Bradlei Wharf Designer Outlet	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.2	0.1	0.0	0.3	0.5
Edge-of Centre	Charlton SC	0.2	0.2	0.0	0.0	0.0	0.1	0.0	0.3	0.0	0.0	0.7	0.7
	Subtotal	32.8	17.8	5.0	3.2	2.6	1.7	0.9	15.7	0.4	0.5	79.1	80.6
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.7	0.3	5.0	18.6	34.6	6.7	0.9	2.0	0.1	0.0	68.2	68.9
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0	1.1	0.0	0.4	0.5	4.9	0.8	0.4	0.1	0.0	8.2	8.4
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	1.6	1.6
		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOCAL CENTRES		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ASH	0.0	0.0	0.0	0.0	0.0	0.2	1.2	0.0	0.1	0.1	1.4	1.6
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.1	0.1	0.0	0.0	0.4	0.4
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.1
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.5	1.3	0.1	0.1	0.1	1.9	2.1
VILLAGES & HAMLETS													
	ALKHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.6	0.2	0.0	0.0	0.2	0.0	0.0	0.3	0.0	0.0	1.2	1.3
	B&Q, Honeywood Parkway, Whitfield	3.6	2.5	1.5	2.7	1.8	1.3	1.0	3.8	0.2	0.2	18.2	18.7
	Homebase, Dover Business Park, Whitfield	0.6	0.6	0.4	0.6	0.6	0.8	0.1	0.5	0.1	0.0	4.2	4.3
	Screwfix, Dover Business Park, Whitfield, Dover	0.1	0.0	0.3	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.6	0.6
	Jewson, Coombe Valley Road, Dover	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.4	0.4
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	1.0	0.3	0.7	0.2	0.0	0.1	0.1	0.6	0.0	0.0	2.9	3.0
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	1.8	3.8	2.9	3.5	1.0	4.1	0.7	7.4	0.1	0.0	25.5	25.8
	Whitfield-Other	0.0	0.2	1.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.4	1.4
	Subtotal	7.9	7.6	6.8	7.0	3.7	6.5	1.8	12.8	0.3	0.2	54.4	55.4
Deal	Out-of-centre	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2
	Walmer	0.0	0.0	0.0	0.2	0.1	0.1	0.0	0.1	0.0	0.0	0.4	0.4
	Subtotal	0.0	0.0	0.0	0.3	0.2	0.1	0.0	0.1	0.0	0.0	0.6	0.6
DOVER DISTRICT COUNCIL AREA		41.4	26.8	16.8	29.5	41.6	20.3	7.3	31.1	1.0	0.8	214.1	217.6
OTHER STORES OUTSIDE DDC AREA													
	Ashford	2.6	0.6	0.3	0.3	0.3	0.1	0.2	0.4	0.1	3.1	4.7	7.7
	Ashford- Ashford Designer Outlet	3.9	0.3	0.3	0.0	0.1	0.1	0.0	0.7	0.3	0.3	5.2	5.8
	Westwood	4.6	1.8	3.6	20.9	13.3	21.4	6.2	3.7	0.4	0.3	75.9	77.2
	Canterbury	12.7	12.2	11.4	11.0	8.8	11.9	37.8	26.8	33.5	14.0	133.2	181.0
	Folkestone	9.7	3.8	1.2	0.2	1.1	0.1	0.7	3.4	0.1	39.5	19.9	57.2
	Margate	0.2	0.7	0.1	0.1	0.4	1.2	0.2	0.0	0.0	0.0	2.9	2.9
	Ramsgate	0.0	0.0	0.2	0.0	0.0	0.5	0.7	0.0	0.0	0.0	1.4	1.4
	ALL OTHER CENTRES / STORES:	0.7	1.7	0.7	1.9	0.9	1.2	0.8	0.7	3.2	3.9	8.6	15.6
All other Centres / stores		34.5	21.0	17.7	34.5	24.9	36.5	46.5	35.6	37.5	61.1	251.9	348.8
TOTAL		**75.9**	**47.7**	**34.5**	**64.0**	**66.5**	**56.8**	**53.8**	**66.7**	**38.6**	**61.9**	**466.0**	**566.4**

TABLE 5: **2032 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
	TOTAL AVAILABLE SPEND (excluding SFT):	91.4	57.3	41.0	76.3	79.2	68.0	64.8	79.7	47.1	75.3	557.6	680.0
DOVER (SECONDARY REGIONAL CENTRE)													
Town Centre	DOVER	39.3	21.1	5.9	3.8	3.1	1.8	1.1	18.3	0.3	0.6	93.4	95.4
	De Bradlei Wharf Designer Outlet	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.2	0.2	0.0	0.4	0.6
Edge-of Centre	Charlton SC	0.2	0.3	0.0	0.0	0.0	0.1	0.0	0.3	0.0	0.0	0.8	0.9
	Subtotal	39.5	21.3	6.0	3.8	3.1	2.0	1.1	18.7	0.5	0.6	94.7	96.8
DEAL (DISTRICT CENTRE)													
Town Centre	DEAL	0.9	0.4	5.9	22.2	41.2	8.1	1.0	2.4	0.1	0.0	81.6	82.7
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)													
Town Centre	SANDWICH	0.0	1.3	0.0	0.4	0.6	5.9	1.0	0.5	0.1	0.0	9.8	10.0
AYLESHAM (RURAL SERVICE CENTRE)													
	RSC-AYLESHAM	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	1.9	1.9
		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOCAL CENTRES		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ASH	0.0	0.0	0.0	0.0	0.0	0.2	1.4	0.0	0.1	0.1	1.6	1.9
	CAPEL-LE-FERNE	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.1	0.0	0.0	0.5	0.5
	SHEPHERDSWELL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	WINGHAM	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.1
	Subtotal	0.0	0.0	0.0	0.0	0.0	0.5	1.6	0.1	0.1	0.1	2.3	2.5
VILLAGES & HAMLETS													
	ALKHAM	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OUT-OF-CENTRE													
Dover	Dover, Granville St (Carpetright/Halfords)	0.7	0.2	0.0	0.0	0.3	0.0	0.0	0.3	0.0	0.0	1.5	1.5
	B&Q, Honeywood Parkway, Whitfield	4.3	3.0	1.8	3.2	2.1	1.5	1.2	4.6	0.2	0.3	21.7	22.4
	Homebase, Dover Business Park, Whitfield	0.7	0.7	0.5	0.7	0.7	0.9	0.1	0.6	0.1	0.0	5.0	5.1
	Screwfix, Dover Business Park, Whitfield, Dover	0.1	0.0	0.3	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.8	0.8
	Jewson, Coombe Valley Road, Dover	0.2	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.5	0.5
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	1.2	0.3	0.8	0.3	0.0	0.1	0.1	0.7	0.0	0.0	3.5	3.5
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	2.1	4.6	3.5	4.1	1.2	4.9	0.8	8.8	0.1	0.0	30.5	30.9
	Whitfield-Other	0.1	0.2	1.1	0.0	0.0	0.0	0.0	0.2	0.0	0.0	1.6	1.7
	Subtotal	9.5	9.1	8.0	8.4	4.4	7.8	2.2	15.3	0.4	0.3	65.1	66.5
Deal	Out-of-centre	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2
	Walmer	0.0	0.0	0.0	0.2	0.1	0.1	0.0	0.1	0.0	0.0	0.5	0.5
	Subtotal	0.0	0.0	0.0	0.4	0.3	0.1	0.0	0.1	0.0	0.0	0.8	0.8
DOVER DISTRICT COUNCIL AREA		49.8	32.1	19.9	35.2	49.6	24.4	8.8	37.1	1.2	1.0	256.2	261.2
OTHER STORES OUTSIDE DDC AREA													
	Ashford	3.2	0.7	0.3	0.3	0.4	0.1	0.3	0.4	0.1	3.7	5.6	9.2
	Ashford- Ashford Designer Outlet	4.7	0.3	0.4	0.0	0.1	0.1	0.0	0.9	0.4	0.4	6.2	7.0
	Westwood	5.6	2.2	4.3	24.9	15.8	25.6	7.5	4.4	0.5	0.4	90.8	92.7
	Canterbury	15.3	14.6	13.5	13.1	10.5	14.2	45.5	32.0	40.8	17.1	159.4	217.3
	Folkestone	11.7	4.5	1.4	0.3	1.3	0.1	0.8	4.1	0.1	48.0	23.9	68.7
	Margate	0.2	0.8	0.1	0.2	0.5	1.4	0.2	0.0	0.0	0.0	3.5	3.5
	Ramsgate	0.0	0.0	0.3	0.0	0.0	0.7	0.8	0.0	0.0	0.0	1.7	1.7
	ALL OTHER CENTRES / STORES:	0.8	2.0	0.8	2.3	1.0	1.5	0.9	0.8	3.9	4.8	10.3	18.7
All other Centres / stores		41.5	25.2	21.1	41.1	29.7	43.7	55.9	42.5	45.8	74.3	301.4	418.8
TOTAL		**91.4**	**57.3**	**41.0**	**76.3**	**79.2**	**68.0**	**64.8**	**79.7**	**47.1**	**75.3**	**557.6**	**680.0**

TABLE 6: **2037 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

			Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	DDC AREA (Zones 1-8)	TOTAL STUDY AREA
		TOTAL AVAILABLE SPEND (excluding SFT):	110.0	68.6	48.3	90.9	94.2	81.0	77.9	95.1	56.9	91.4	666.0	814.3
DOVER (SECONDARY REGIONAL CENTRE)														
Town Centre	DOVER		47.3	25.2	6.9	4.6	3.7	2.2	1.3	21.8	0.4	0.8	111.6	114.2
	De Bradlei Wharf Designer Outlet		0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.2	0.2	0.0	0.5	0.7
Edge-of Centre	Charlton SC		0.2	0.3	0.0	0.0	0.0	0.1	0.0	0.4	0.0	0.0	1.0	1.0
		Subtotal	47.6	25.6	7.0	4.6	3.7	2.4	1.3	22.4	0.6	0.8	113.1	115.9
DEAL (DISTRICT CENTRE)														
Town Centre	DEAL		1.1	0.5	6.9	26.4	49.0	9.6	1.2	2.9	0.1	0.0	97.5	99.0
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)														
Town Centre	SANDWICH		0.0	1.5	0.0	0.5	0.8	7.0	1.2	0.6	0.1	0.0	11.7	12.0
AYLESHAM (RURAL SERVICE CENTRE)														
	RSC-AYLESHAM		0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.0	2.2	2.3
			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LOCAL CENTRES			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	ASH		0.0	0.0	0.0	0.0	0.0	0.2	1.7	0.0	0.2	0.1	1.9	2.2
	CAPEL-LE-FERNE		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	EASTRY		0.0	0.0	0.0	0.0	0.0	0.3	0.2	0.2	0.0	0.0	0.6	0.6
	SHEPHERDSWELL		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	WINGHAM		0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2	0.2
		Subtotal	0.0	0.0	0.0	0.0	0.0	0.7	1.9	0.2	0.2	0.1	2.7	3.0
VILLAGES & HAMLETS														
	ALKHAM		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1
OUT-OF-CENTRE														
Dover	Dover, Granville St (Carpetright/Halfords)		0.9	0.3	0.0	0.0	0.3	0.0	0.0	0.4	0.0	0.0	1.8	1.8
	B&Q, Honeywood Parkway, Whitfield		5.2	3.6	2.1	3.9	2.5	1.8	1.4	5.4	0.3	0.3	26.0	26.9
	Homebase, Dover Business Park, Whitfield		0.9	0.9	0.6	0.9	0.8	1.1	0.1	0.8	0.1	0.0	6.0	6.1
	Screwfix, Dover Business Park, Whitfield, Dover		0.1	0.0	0.4	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.9	0.9
	Jewson, Coombe Valley Road, Dover		0.3	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.6	0.6
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield		1.5	0.4	0.9	0.3	0.1	0.1	0.1	0.8	0.0	0.0	4.2	4.2
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield		2.5	5.5	4.1	4.9	1.4	5.8	1.0	10.5	0.1	0.0	36.4	37.1
	Whitfield-Other		0.1	0.2	1.4	0.0	0.0	0.0	0.0	0.2	0.0	0.0	2.0	2.0
		Subtotal	11.4	10.9	9.5	10.0	5.2	9.2	2.7	18.2	0.5	0.3	77.8	79.6
Deal	Out-of-centre		0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.3	0.3
	Walmer		0.0	0.0	0.0	0.3	0.2	0.1	0.0	0.1	0.0	0.0	0.6	0.6
		Subtotal	0.0	0.0	0.0	0.4	0.3	0.1	0.0	0.1	0.0	0.0	0.9	0.9
DOVER DISTRICT COUNCIL AREA			60.0	38.5	23.5	41.9	59.0	29.0	10.6	44.3	1.5	1.2	306.0	312.8
OTHER STORES OUTSIDE DDC AREA														
	Ashford		3.8	0.8	0.4	0.4	0.5	0.2	0.3	0.5	0.1	4.5	6.7	11.0
	Ashford- Ashford Designer Outlet		5.7	0.4	0.4	0.0	0.1	0.1	0.0	1.0	0.5	0.4	7.4	8.4
	Westwood		6.7	2.6	5.1	29.7	18.8	30.5	9.0	5.2	0.6	0.4	108.5	111.0
	Canterbury		18.4	17.5	16.0	15.6	12.5	16.9	54.7	38.2	49.4	20.7	190.5	260.2
	Folkestone		14.1	5.4	1.7	0.3	1.5	0.2	1.0	4.9	0.1	58.3	28.5	82.2
	Margate		0.3	1.0	0.1	0.2	0.6	1.6	0.3	0.0	0.0	0.0	4.1	4.2
	Ramsgate		0.0	0.0	0.3	0.0	0.0	0.8	0.9	0.0	0.0	0.0	2.0	2.1
	ALL OTHER CENTRES / STORES:		1.0	2.4	1.0	2.7	1.2	1.8	1.1	0.9	4.7	5.8	12.3	22.4
All other Centres / stores			50.0	30.2	24.8	48.9	35.3	52.0	67.3	50.8	55.4	90.2	360.0	501.5
TOTAL			**110.0**	**68.6**	**48.3**	**90.9**	**94.2**	**81.0**	**77.9**	**95.1**	**56.9**	**91.4**	**666.0**	**814.3**

APPENDIX 9: CONVENIENCE GOODS CAPACITY ASSESSMENT

TABLE 1: **REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA**

		Estimated 'Inflow' from Outside Study Area	2017	2022	2027	2032	2037
DOVER TOWN & EDGE-OF-CENTRE (SECONDARY REGIONAL CENTRE)							
	Co-op, Castle Street, Dover	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	Costcutter, Pencester Road, Dover	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	Iceland, High Street, Dover	10%	£1.3	£1.3	£1.3	£1.4	£1.4
	Marks & Spencer, Biggin Street, Dover	10%	£3.6	£3.6	£3.7	£3.9	£4.0
	Spar, Folkestone Road, Dover	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	2%	£1.8	£1.9	£1.9	£2.0	£2.1
	Subtotal		£6.7	£6.8	£7.0	£7.2	£7.5
DEAL TOWN & EDGE OF CENTRE (DISTRICT CENTRE)							
	Co-op, Park Street, Deal	5%	£3.2	£3.2	£3.3	£3.4	£3.5
	Co-op, Queens Street, Deal	5%	£0.8	£0.8	£0.8	£0.9	£0.9
	Iceland, Queen Street, Deal	5%	£4.2	£4.3	£4.4	£4.5	£4.7
	Marks & Spencer, High Street, Deal	5%	£4.6	£4.7	£4.9	£5.0	£5.2
	Sainsbury's Superstore, West Street, Deal	5%	£36.5	£37.2	£38.4	£39.6	£40.8
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	2%	£5.7	£5.8	£6.0	£6.2	£6.4
	Subtotal		£55.0	£56.0	£57.8	£59.6	£61.5
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)							
	Spar, Market Street, Sandwich	5%	£0.5	£0.5	£0.5	£0.5	£0.5
	Co-op, Moat Sole Road, Sandwich	2%	£7.8	£7.9	£8.2	£8.5	£8.7
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	2%	£2.0	£2.1	£2.1	£2.2	£2.3
	Subtotal		£10.3	£10.5	£10.8	£11.2	£11.5
AYLESHAM (RURAL SERVICE CENTRE)							
	Co-op, Market Square, Aylesham	2%	£2.9	£2.9	£3.0	£3.1	£3.2
	OTHER LOCAL SHOPS IN THE TOWN CENTRE	2%	£0.4	£0.5	£0.5	£0.5	£0.5
	Subtotal		£3.3	£3.4	£3.5	£3.6	£3.7
LOCAL CENTRES							
	ASH	2%	£1.8	£1.9	£1.9	£2.0	£2.0
	CAPEL-LE-FERNE	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	EASTRY	2%	£0.2	£0.2	£0.2	£0.2	£0.2
	SHEPHERDSWELL	2%	£0.4	£0.4	£0.4	£0.4	£0.4
	WINGHAM	2%	£1.9	£1.9	£2.0	£2.0	£2.1
	Subtotal		£4.2	£4.3	£4.5	£4.6	£4.7
VILLAGES & HAMLETS							
	ELHAM	2%	£0.3	£0.4	£0.4	£0.4	£0.4
	KINGSDOWN	2%	£0.1	£0.1	£0.1	£0.1	£0.1
	PRESTON	2%	£0.0	£0.0	£0.1	£0.1	£0.1
	ST.MARGARET'S AT CLIFFE	2%	£0.9	£0.9	£0.9	£1.0	£1.0
	Subtotal		£1.4	£1.4	£1.4	£1.5	£1.5
OUT-OF-CENTRE							
Dover	Aldi, Cherry Tree Avenue, Dover	10%	£41.0	£41.8	£43.2	£44.5	£45.9
	Asda Supermarket, Charlton Green, Dover	10%	£9.8	£10.0	£10.3	£10.6	£10.9
	Co-op, Lower Road, River, Dover	2%	£3.0	£3.0	£3.1	£3.2	£3.3
	Costcutter, Sheriden Road, Dover	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	Farm Foods, Charlton Green, Dover	2%	£0.5	£0.5	£0.5	£0.5	£0.5
	Morrisons, Bridge Street, Dover	10%	£36.4	£37.1	£38.3	£39.5	£40.7
	Spar, Townwall Street, Dover	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	Tesco Extra, White Cliffs Business Park, Whitfield, Dover	10%	£62.2	£63.3	£65.4	£67.5	£69.5
	Whitfield-Local_Stores (EXCLUDING White Cliffs)	2%	£1.4	£1.4	£1.4	£1.5	£1.5
Deal	Co-op, Beauchamp Avenue, Mill Hill, Deal	2%	£6.0	£6.1	£6.3	£6.5	£6.7
	Co-op, Lord Warden, Hamilton Road, Deal	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	Tesco Express, Mill Hill, Deal	2%	£4.4	£4.5	£4.6	£4.8	£4.9
	Walmer-Local Stores	2%	£0.1	£0.2	£0.2	£0.2	£0.2
Sandwich	N/A						
	Subtotal		£164.8	£167.9	£173.4	£178.8	£184.3
DOVER DISTRICT COUNCIL AREA			£245.6	£250.3	£258.4	£266.6	£274.7

TABLE 2: **COMMITTED CONVENIENCE FLOORSPACE**

Centre	Scheme	Planning Ref	Gross Floorspace (sqm)	Net Sales Floorspace (sqm)	Sales Density 2017 (£ per sqm)	Turnover (£m) 2017	2022	2027	2032	2037
Dover[1]	St James's Site (DTIZ) between Townwall Street, Castle Street/King Street, Russell Street, Woolcomber Street	13/00907	7,473	1,046	£10,000	£10.5	£10.4	£10.5	£10.5	£10.6
Whitfield [2]	Land at Honeywood Parkway, White Cliffs Business Park, Dover CT16 3FH	16/00976	2,760	1,546	£10,000	£15.5	£15.4	£15.5	£15.5	£15.6
Whitfield [3]	Whitfield Urban Extension (land to east of Sandwich Rd and nw of Napchester Rd - construction of a new community hub/district centre.	10/01011	1,900	652	£7,500	£4.9	£4.9	£4.9	£4.9	£4.9
Deal [4]	Land on the west side of Albert Road, Deal - mixed use development inc 142 residential units	15/01290	370	259	£7,500	£1.9	£1.9	£1.9	£2.0	£2.0
Sandwich [5]	Discovery Park, Enterprise Zone, Ramsgate Road, Sandwich CT13 9ND	13/00783	4,830	2,367	£10,000	£23.7	£23.6	£23.7	£23.8	£23.9
Aylesham [6]	Aylesham Village Expansion, Aylesham	07/01081	477	334	£7,500	£2.5	£2.5	£2.5	£2.5	£2.5
TOTAL			17,810	6,203		£58.9	£58.7	£58.9	£59.2	£59.5

Notes:
(1) 13/00907 - Demolition of existing buildings to provide 7429 sqm of retail (A1) floor space in 2 main blocks together with 2472 sqm of cinema (D2) floor space, 1060 sqm of restaurant (A3/A4) in a further block and 44 sqm of retail (A1) in a kiosk to Flying Horse Lane, together with associated car parking, highway works and landscaping at St James Site (DTIZ) generally between town wall Street, Castle Street/King Street, Russell Street, Woolcomber Street and including land fronting Flying Horse Lane.
(2) 16/00976 - Erection of detached retail store (2760 sqm gross internal floor space, including mezzanine) together with provision of 159 car parking spaces and assoc landscaping.
(3) 10/01011 - Outline Application for the construction of a new community hub/district centre, comprising BRT hub, health and social care centre (class D1) and police office (Class b1) totalling up to 1900 sqm, retail space (class A1-A3) and employment space (Class B1(A) totalling up to 2725 sqm, and 100 no. 2-5 bed residential units including 6 no. supported living units (class C3) provision of learning and communit6y campus to incorporate secondary energy centre, new 420 place 2fe primary school including early years provision and provision of access arrangements, all associated car parking, infrastructure and landscaping, with all matters reserved for future consideration (referred to as |Phase 1A in application documentation). For the purposes of this assessment it is assumed that 70% of the floorspace will be for convenience goods and 30% for comparison goods.
(4) 15/01290 - Land on the West side of Albert Road, Deal, CT14 9RB. Outline Application for a mixed use development inc 142 residential units, 960 sqm B1 office, 370 sqm A1 & 280 sqm D1 & link road between Albert Rd & Southwall Rd.
(5) 13/00783 - Outline application for the redevelopment of the site to provide a foodstore with associated car parking, petrol filling station (to include associated kiosk and car washing facilities), access and servicing arrangements and landscaping (to include removal of existing surface infrastructure)
(6) 07/01081 - A full application for residential development for 191 dwellings of which 20% will be affordable; all associated works and infrastructure, together with new shops and apartments; alterations to existing shops and apartments; landscaping to existing streets and public open spaces including Market Square; the formation of new public open spaces; upgrade of sports pitch and provision of changing facilities at Ratling Road; formation of squares and a strategic play area; traffic management schemes and new car parking areas; other landscaping works; temporary works and access; construction compounds and off-site highway works.

TABLE 3: **DOVER DISTRICT COUNCIL LOCAL AUTHORITY AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£245.6	£250.3	£258.4	£266.6	£274.7
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£245.6	£244.9	£245.6	£246.9	£248.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£5.4	£12.8	£19.7	£26.6
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£58.7	£58.9	£59.2	£59.5
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£53.4**	**-£46.1**	**-£39.5**	**-£32.9**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,463	£12,500	£12,563	£12,626
	(ii) Net Floorspace Capacity (sq m):	**-**	**-4,282**	**-3,691**	**-3,143**	**-2,606**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-6,117	-5,273	-4,491	-3,723
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,979	£7,000	£7,035	£7,070
	(ii) Net Floorspace Capacity (sq m):	**-**	**-7,646**	**-6,591**	**-5,613**	**-4,654**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-10,922	-9,416	-8,019	-6,649

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 15 (December 2017) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2022.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 4: **DOVER TOWN CENTRE- CONVENIENCE GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£6.7	£6.8	£7.0	£7.2	£7.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£6.7	£6.6	£6.7	£6.7	£6.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.3	£0.5	£0.7
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£10.4	£10.5	£10.5	£10.6
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£10.3**	**-£10.1**	**-£10.0**	**-£9.8**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,463	£12,500	£12,563	£12,626
	(ii) Net Floorspace Capacity (sq m):	**-**	**-825**	**-809**	**-794**	**-780**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-1,179	-1,156	-1,135	-1,114
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,979	£7,000	£7,035	£7,070
	(ii) Net Floorspace Capacity (sq m):	**-**	**-1,474**	**-1,445**	**-1,418**	**-1,392**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-2,105	-2,064	-2,026	-1,989

Notes: Commitments refer to:

(1) 13/00907 - Demolition of existing buildings to provide 7429 sqm of retail (A1) floor space in 2 main blocks together with 2472 sqm of cinema (D2) floor space, 1060 sqm of restaurant (A3/A4) in a further block and 44 sqm of retail (A1) in a kiosk to Flying Horse Lane, together with associated car parking, highway works and landscaping at St James Site (DTIZ) generally between town wall Street, Castle Street/King Street, Russell Street, Woolcomber Street and including land fronting Flying Horse Lane.

TABLE 5: **DEAL AND SANDWICH TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£65.3	£66.5	£68.7	£70.8	£73.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) (1):	£65.3	£65.1	£65.3	£65.6	£65.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.4	£3.4	£5.2	£7.1
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**£1.4**	**£3.4**	**£5.2**	**£7.1**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,463	£12,500	£12,563	£12,626
	(ii) Net Floorspace Capacity (sq m):	**-**	**115**	**272**	**417**	**560**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		164	388	596	800
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,979	£7,000	£7,035	£7,070
	(ii) Net Floorspace Capacity (sq m):	**-**	**205**	**485**	**745**	**1,000**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		293	693	1,064	1,428

TABLE 6: **ALL OTHER LOCAL & VILLAGE CENTRES ACROSS DOVER DISTRICT AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£8.9	£9.1	£9.4	£9.7	£10.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) [1]:	£8.9	£8.9	£8.9	£9.0	£9.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.2	£0.5	£0.7	£1.0
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.5	£2.5	£2.5	£2.5
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£2.3**	**-£2.0**	**-£1.8**	**-£1.6**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,463	£12,500	£12,563	£12,626
	(ii) Net Floorspace Capacity (sq m):	**-**	**-185**	**-163**	**-143**	**-124**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-264	-233	-205	-177
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,979	£7,000	£7,035	£7,070
	(ii) Net Floorspace Capacity (sq m):	**-**	**-330**	**-291**	**-256**	**-221**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-471	-416	-365	-316

Notes: Commitments refer to:

(1) 07/01081 - A full application for residential development for 191 dwellings of which 20% will be affordable; all associated works and infrastructure, together with new shops and apartments; alterations to existing shops and apartments; landscaping to existing streets and public open spaces including Market Square; the formation of new public open spaces; upgrade of sports pitch and provision of changing facilities at Ratling Road; formation of squares and a strategic play area; traffic management schemes and new car parking areas; other landscaping works; temporary works and access; construction compounds and off-site highway works.

TABLE 7: **ALL OUT-OF-CENTRE FLOORSPACE ACROSS DOVER DISTRICT AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£164.8	£167.9	£173.4	£178.8	£184.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) [1]:	£164.8	£164.3	£164.8	£165.6	£166.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£3.6	£8.6	£13.2	£17.8
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£45.8	£46.0	£46.2	£46.4
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£42.2**	**-£37.4**	**-£33.0**	**-£28.6**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,463	£12,500	£12,563	£12,626
	(ii) Net Floorspace Capacity (sq m):	**-**	**-3,386**	**-2,990**	**-2,623**	**-2,263**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-4,838	-4,272	-3,747	-3,232
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,979	£7,000	£7,035	£7,070
	(ii) Net Floorspace Capacity (sq m):	**-**	**-6,047**	**-5,340**	**-4,684**	**-4,040**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-8,639	-7,628	-6,691	-5,772

Notes: Commitments refer to:

(1) 16/00976 - Erection of detached retail store (2760 sqm gross internal floor space, including mezzanine) together with provision of 159 car parking spaces and assoc landscaping.

(2) 10/01011 - Outline Application for the construction of a new community hub/district centre, comprising BRT hub, health and social care centre (class D1) and police office (Class b1) totalling up to 1900 sqm, retail space (class A1-A3) and employment space (Class B1(A) totalling up to 2725 sqm, and 100 no. 2-5 bed residential units including 6 no. supported living units (class C3) provision of learning and communit6y campus to incorporate secondary energy centre, new 420 place 2fe primary school including early years provision and provision of access arrangements, all associated car parking, infrastructure and landscaping, with all matters reserved for future consideration (referred to as |Phase 1A in application documentation). For the purposes of this assessment it is assumed that 70% of the floorspace will be for convenience goods and 30% for comparison goods.

(3) 15/01290 - Outline Application for a mixed use development inc 142 residential units, 960 sqm B1 office, 370 sqm A1 & 280 sqm D1 & link road between Albert Rd & Southwall Rd

(4) 13/00867 - Proposed new food store, doctor's surgery and pharmacy, together with associated car parking, landscaping, courtyard and service yard.

(5) 13/00783 - Outline application for the redevelopment of the site to provide a foodstore with associated car parking, petrol filling station (to include associated kiosk and car washing facilities), access and servicing arrangements and landscaping (to include removal of existing surface infrastructure)

TABLE 8: **SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)**
Assume Equilibrium at 2017 and Constant Market Shares

		2022	2027	2032	2037
Dover	Town Centre	-825	-809	-794	-780
Deal & Sand	Town Centre(s)	115	272	417	560
All Other Local & Village Centres		-185	-163	-143	-124
All Out-of-Centre Floorspace		-3,386	-2,990	-2,623	-2,263
TOTAL DISTRICT WIDE CONVENIENCE GOODS CAPACITY		**-4,282**	**-3,691**	**-3,143**	**-2,606**

TABLE 9: **SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)**
Assume Equilibrium at 2017 and Constant Market Shares

		2022	2027	2032	2037
Dover Town	Town Centre	-1,474	-1,445	-1,418	-1,392
Deal & Sand	Town Centre(s)	205	485	745	1,000
All Other Local & Village Centres		-330	-291	-256	-221
All Out-of-Centre Floorspace		-6,047	-5,340	-4,684	-4,040
TOTAL DISTRICT WIDE CONVENIENCE GOODS CAPACITY		**-7,646**	**-6,591**	**-5,613**	**-4,654**

APPENDIX 10: COMPARISON GOODS CAPACITY ASSESSMENT

TABLE 1: **REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA**

		Estimated 'Inflow' from Outside Study Area	2017	2022	2027	2032	2037
DOVER (SECONDARY REGIONAL CENTRE)							
Town Centre	DOVER	15%	£69.4	£77.9	£93.4	£112.2	£134.4
	De Bradlei Wharf Designer Outlet	5%	£0.4	£0.4	£0.5	£0.6	£0.7
Edge-of Centre	Charlton SC	2%	£0.5	£0.6	£0.7	£0.9	£1.0
	Subtotal		£70.3	£78.9	£94.7	£113.6	£136.1
DEAL (DISTRICT CENTRE)							
Town Centre	DEAL	10%	£56.8	£63.8	£76.5	£91.9	£110.0
SANDWICH TOWN CENTRE (RURAL SERVICE CENTRE)							
Town Centre	SANDWICH	10%	£6.9	£7.7	£9.3	£11.2	£13.4
AYLESHAM (RURAL SERVICE CENTRE)							
	RSC-AYLESHAM	2%	£1.2	£1.3	£1.6	£1.9	£2.3
LOCAL CENTRES							
	ASH	2%	£1.2	£1.3	£1.6	£1.9	£2.3
	CAPEL-LE-FERNE	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	EASTRY	2%	£0.3	£0.4	£0.5	£0.5	£0.6
	SHEPHERDSWELL	2%	£0.0	£0.0	£0.0	£0.0	£0.0
	WINGHAM	2%	£0.1	£0.1	£0.1	£0.1	£0.2
	Subtotal		£1.6	£1.8	£2.2	£2.6	£3.1
VILLAGES & HAMLETS							
	ALKHAM	2%	£0.0	£0.0	£0.0	£0.0	£0.1
OUT-OF-CENTRE							
Dover	Dover, Granville St (Carpetright/Halfords)	2%	£1.0	£1.1	£1.3	£1.5	£1.8
	B&Q, Honeywood Parkway, Whitfield	2%	£14.2	£15.9	£19.1	£22.9	£27.4
	Homebase, Dover Business Park, Whitfield	2%	£3.2	£3.6	£4.4	£5.2	£6.3
	Screwfix, Dover Business Park, Whitfield, Dover	2%	£0.5	£0.5	£0.7	£0.8	£0.9
	Jewson, Coombe Valley Road, Dover	2%	£0.3	£0.4	£0.4	£0.5	£0.6
	Honeywood Retail Park (B&M, Bensons for Beds, Pets @ Home), Whitfield	5%	£2.3	£2.6	£3.1	£3.7	£4.5
	White Cliffs Business Park (Tesco Extra, Travis Perkins, Buildbase), Whitfield	5%	£20.2	£22.6	£27.1	£32.6	£39.0
	Whitfield-Other	2%	£1.0	£1.2	£1.4	£1.7	£2.0
	Subtotal		£42.7	£47.9	£57.4	£68.9	£82.6
Deal	Out-of-centre	2%	£0.2	£0.2	£0.2	£0.2	£0.3
	Walmer	2%	£0.3	£0.4	£0.4	£0.5	£0.6
	Subtotal		£0.5	£0.5	£0.6	£0.8	£0.9
DOVER DISTRICT COUNCIL AREA			**£180.0**	**£202.1**	**£242.4**	**£290.9**	**£348.4**

TABLE 2: **COMMITTED COMPARISON GOODS FLOORSPACE**

Centre	Scheme	Planning Ref	Gross Floorspace (sqm)	Net Sales Floorspace (sqm)	Sales Density 2017 (£ per sqm)	Turnover (£m) 2017	2022	2027	2032	2037
Dover[1]	St James's Site (DTIZ) between Townwall Street, Castle Street/King Street, Russell Street, Woolcomber Street	13/00907	7,473	4,185	£5,500	£23.0	£25.3	£28.2	£31.5	£35.1
Whitfield[2]	Whitfield Urban Extension (land to east of Sandwich Rd and nw of Napchester Rd)	10/01011	1,900	279	£3,500	£1.0	£1.1	£1.2	£1.3	£1.5
Whitfield[3]	Land at Honeywood Parkway, White Cliffs Business Park, Dover CT16 3FH	16/00976	2,760	386	£3,500	£1.4	£1.5	£1.7	£1.9	£2.1
Sandwich [4]	Discovery Park, Enterprise Zone, Ramsgate Road, Sandwich CT13 9ND	13/00783	4,830	1,014	£3,500	£3.6	£3.9	£4.4	£4.9	£5.4
TOTAL			16,963	5,865		£28.9	£31.8	£35.5	£39.5	£44.1

Notes:

(1) 13/00907 - Demolition of existing buildings to provide 7429 sqm of retail (A1) floor space in 2 main blocks together with 2472 sqm of cinema (D2) floor space, 1060m2 of restaurant (A3/A4) in a further block and 44 sqm of retail (A1) in a kiosk to Flying Horse Lane, together with associated car parking, highway works and landscaping at St James Site (DTIZ) generally between town wall Street, Castle Street/King Street, Russell Street, Woolcomber Street and including land fronting Flying Horse Lane.

(2) 10/01011 - Outline Application for the construction of a new community hub/district centre, comprising BRT hub, health and social care centre (class D1) and police office (Class b1) totalling up to 1900 sqm, retail space (class A1-A3) and employment space (Class B1(A) totalling up to 2,725 sqm, and 100 no. 2-5 bed residential units including 6 no. supported living units (class C3) provision of learning and communit6y campus to incorporate secondary energy centre, new 420 place 2fe primary school including early years provision and provision of access arrangements, all associated car parking, infrastructure and landscaping, with all matters reserved for future consideration (referred to as |Phase 1A in application documentation). For the purposes of this assessment it is assumed that 70% of the floorspace will be for convenience goods and 30% for comparison goods.

(3)16/00976 - Erection of detached retail store (2760 sqm gross internal floor space, including mezzanine) together with provision of 159 car parking spaces and assoc landscaping. It is assumed that 80% of the net sales area will be used for convenience goods and 20% for comparison goods.

(4) 13/00783 - Outline application for the redevelopment of the site to provide a foodstore with associated car parking, petrol filling station (to include associated kiosk and car washing facilities), access and servicing arrangements and landscaping (to include removal of existing surface infrastructure).

TABLE 3: **DOVER DISTRICT COUNCIL LOCAL AUTHORITY AREA - COMPARISON GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£180.0	£202.1	£242.4	£290.9	£348.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) [1]:	£180.0	£198.0	£220.9	£246.3	£274.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£4.1	£21.4	£44.6	£73.8
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£31.8	£35.5	£39.5	£44.1
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£27.6**	**-£14.1**	**£5.0**	**£29.7**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,598	£7,364	£8,210	£9,154
	(ii) Net Floorspace Capacity (sq m):	**-**	**-4,190**	**-1,910**	**615**	**3,243**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-5,986	-2,728	878	4,633

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 15* (December 2017) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2022.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 4: **DOVER TOWN CENTRE- COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£70.3	£78.9	£94.7	£113.6	£136.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£70.3	£77.3	£86.3	£96.2	£107.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.6	£8.4	£17.4	£28.8
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£25.3	£28.2	£31.5	£35.1
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**-£23.7**	**-£19.9**	**-£14.1**	**-£6.3**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,598	£7,364	£8,210	£9,154
	(ii) Net Floorspace Capacity (sq m):	**-**	**-3,592**	**-2,701**	**-1,715**	**-688**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-5,131	-3,858	-2,450	-983

Notes: Commitments refer to:

(1) 13/00907 - Demolition of existing buildings to provide 7429 sqm of retail (A1) floor space in 2 main blocks together with 2472 sqm of cinema (D2) floor space, 1060 sqm of restaurant (A3/A4) in a further block and 44m2 of retail (A1) in a kiosk to Flying Horse Lane, together with associated car parking, highway works and landscaping at St James Site (DTIZ) generally between town wall Street, Castle Street/King Street, Russell Street, Woolcomber Street and including land fronting Flying Horse Lane.

TABLE 5: **DEAL AND SANDWICH TOWN CENTRE- COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£63.7	£71.6	£85.8	£103.0	£123.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£63.7	£70.1	£78.2	£87.2	£97.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.5	£7.6	£15.8	£26.1
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**£1.5**	**£7.6**	**£15.8**	**£26.1**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,598	£7,364	£8,210	£9,154
	(ii) Net Floorspace Capacity (sq m):	**-**	**222**	**1,029**	**1,923**	**2,854**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		317	1,470	2,747	4,077

TABLE 6: **ALL OTHER LOCAL & VILLAGE CENTRES ACROSS DOVER DISTRICT AREA - COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£2.8	£3.2	£3.8	£4.6	£5.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£2.8	£3.1	£3.5	£3.9	£4.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.1	£0.3	£0.7	£1.2
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£0.1**	**£0.3**	**£0.7**	**£1.2**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,598	£7,364	£8,210	£9,154
	(ii) Net Floorspace Capacity (sq m):	**-**	**10**	**46**	**85**	**126**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		14	65	122	180

TABLE 7: **ALL OUT-OF-CENTRE FLOORSPACE ACROSS DOVER DISTRICT AREA - COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2017	2022	2027	2032	2037
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£43.1	£48.4	£58.1	£69.7	£83.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£43.1	£47.4	£52.9	£59.0	£65.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.0	£5.1	£10.7	£17.7
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£6.5	£7.2	£8.0	£9.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**-£5.5**	**-£2.1**	**£2.6**	**£8.7**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,598	£7,364	£8,210	£9,154
	(ii) Net Floorspace Capacity (sq m):	**-**	**-830**	**-284**	**321**	**951**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-1,186	-405	459	1,359

Notes: Commitments refer to:

(1) 10/01011 - Outline Application for the construction of a new community hub/district centre, comprising BRT hub, health and social care centre (class D1) and police office (Class b1) totalling up to 1900 sqm, retail space (class A1-A3) and employment space (Class B1(A) totalling up to 2,725 sqm, and 100 no. 2-5 bed residential units including 6 no. supported living units (class C3) provision of learning and communit6y campus to incorporate secondary energy centre, new 420 place 2fe primary school including early years provision and provision of access arrangements, all associated car parking, infrastructure and landscaping, with all matters reserved for future consideration (referred to as |Phase 1A in application documentation). For the purposes of this assessment it is assumed that 70% of the floorspace will be for convenience goods and 30% for comparison goods.

(2)16/00976 - Erection of detached retail store (2760 sqm gross internal floor space, including mezzanine) together with provision of 159 car parking spaces and assoc landscaping. It is assumed that 80% of the net sales area will be used for convenience goods and 20% for comparison goods.

(3) 13/00783 - Outline application for the redevelopment of the site to provide a foodstore with associated car parking, petrol filling station (to include associated kiosk and car washing facilities), access and servicing arrangements and landscaping (to include removal of existing surface infrastructure).

TABLE 8: **SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)**

Assume Equilibrium at 2017 and Constant Market Shares

	2022	2027	2032	2037
Dover Town Centre	-3,592	-2,701	-1,715	-688
Deal & Sandwi Town Centre(s)	222	1,029	1,923	2,854
All Other Local & Village Centres	10	46	85	126
All Out-of-Centre Floorspace	-830	-284	321	951
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**-4,190**	**-1,910**	**615**	**3,243**

APPENDIX 11: FRONTAGES POLICY REVIEW

1 A REVIEW OF TYPICAL LPA POLICIES ON FRONTAGES

1.1 This Appendix provides a review of policies on frontages from Development Plan Documents adopted by other Local Planning Authorities (LPAs). It is observed that recently adopted policies seek to control the combination of retail and town centre uses as defined by the NPPF based on the following:

- Minimum Use Class threshold
- Control through qualifying criteria
- A hybrid of the above.

1.2 These are detailed below.

Minimum Use Class threshold

1.3 A minimum threshold policy is adopted to control the composition of the shopping frontages in centres. This is where certain Use Classes, typically non-A1 uses, are not permitted if it they would result in the reduction of A1 uses below a certain defined threshold. This can either be a measured proportion of a particular frontage of a certain area of the centre (i.e. the length of individual shop fronts compared to the total frontage length, or the number of units measured against the total number of units in a particular frontage) or the centre as a whole.

1.4 Such an approach is very precise in application and monitoring and does not offer the adaptability or flexibility that may be required when responding to changing town centre trends and consumer patterns. As such, the use of these type of policies is increasingly becoming less popular with LPAs.

1.5 The following DPDs refer to this type of policy:

- Broadland District Council, Development Management DPD, 2015 (Policy R1)
- London Borough of Brent, Local Plan, 2016 (Policy DMP2)
- Newham Council, Newham's Local Plan Detailed Sites and Policies Development Plan Document, 2016 (Policy SP10)

Control Through Qualifying Criteria

1.6 In seeking to control the composition of the shopping frontages in centres, it is possible to employ a specific number criteria, which would need to be met before a certain use is permitted. This would typically apply to non-A1 uses or even wider town centre uses as defined by the NPPF. The latter is more commonly employed for Secondary Frontages, however not in all cases.

1.7 Broadly the wording of the qualifying criteria reflects individual local circumstance. Below are examples of the themes that such policies cover:

a) Permit proposals where they do not adversely impact either individually or cumulatively, on the function, vitality and viability of a particular type of frontage, specific area of the centre or the centre as a whole; or,

b) Permit proposals where they maintain and enhance the vitality of the particular type of frontage, specific area of the centre or the centre as a whole for example by:

i. Promoting evening and daytime economy;
ii. Providing for (independent) retailers that contribute to the overall vitality of the centre;
iii. Not resulting in such a concentration/ excessive concertation as to lead to a significant interruption in the shopping frontage, reducing its character/ attractiveness/ function. Some local plans defined ‘concentration’ by stating a maximum number of adjoining units in the same Use Class;
iv. Retaining active shop window display;
v. Opening (staying open) between certain hours;
vi. Promoting diversity of offer/ extend the range of activities available to shoppers/ other uses as to enhance the experience of visiting the centre;
vii. Increasing footfall/ not resulting in the reduction of footfall;
viii. Not resulting in an over proliferation of any one use type; or
ix. Maintaining the dominant shopping character.

1.8 By way of example, the following recently adopted development plan documents contain these type of policies:

- Chorley Council, Local Plan 2012-2026 Site Allocations and Development Management Policies, 2016 (Policy EP6).
- North Somerset Council, Development Management Policies Sites and Policies Plan Part 1, 2016
- (Policy DM63).
- Fareham Local Plan Part 2: Development Sites and Policies, 2015 (Policies DSP21 & DSP22)
- Hinckley and Bosworth Borough Council, Local Plan 2006 – 2026 Site Allocations and Development Management Policies DPD, 2016 (Policy DM22)
- Blackburn with Darwen Council, Local Plan Part 2 Site Allocations and Development Management Policies, 2015 (Policy 27)
- Bristol City Council, Bristol Central Area Plan, 2015 (Policies BCAP16 & BCAP 17)
- Taunton Deane Borough Council, Taunton Deane Adopted Site Allocations and Development Management Plan, 2016 (Policy TC1)

Hybrid

1.9 In seeking to control the composition of the shopping frontages, some Local Plan documents use “hybrid” frontage policies.

1.10 For example in order to allow for more flexibility it is common for the minimum A1 Use Class threshold to be supplemented by an “exception” policy where other Use Classes are allowed subject to passing a set of predetermined criteria. It should be noted that in such hybrid cases some policies do not set a fixed threshold, but rather encourage achieving and/or maintaining a certain threshold.

1.11 Additionally, it is also possible to supplement a minimum A1 Use Class threshold with criteria based polices, where a proposal would have to pass both sets of tests before being permitted. This is however considered to be a very rigid approach that does not allow for flexibility.

1.12 The following recently adopted development plan documents contain these type of hybrid policies:

- Tunbridge Wells Borough Site Allocations Local Plan, July 2016 (Polices CR5 to CR12)
- London Borough of Hackney - The Hackney Development Management Local Plan, 2015 (Policy DM9)
- Hastings Borough Council, Hastings Development Management Plan, 2015 (Policy SA1)
- South Ribble Borough Council, Local Plan, 2015 (Policy E3)
- Rochford District Council, Rochford Town Centre Area Action Plan, 2015 (Policy 2)

APPENDIX 12: DOVER TOWN CENTRE PEDESTRIAN FLOW COUNT

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Dover Town Centre Pedestrian Counts

for

February 2018

Job Ref: 130218

Table of Contents

Introduction

1.1 Research Background & Objectives

The St James development[1], offering 157,000 ft^2 space will transform the retail and leisure offer in the heart of Dover and South Kent.

NEMS Market Research was commissioned to undertake a study into current footfall levels in the town centre to determine typical footfall patterns at six main points in Dover Town Centre before the opening of the St James Dover development in the Dover Town Investment Zone.

1.2 Research Methodology

To evaluate the footfall in the town centre, six sampling points were selected:

- **Point 1:** 65-66 Biggin Street;
- **Point 2**: 28 Biggin Street;
- **Point 3**: 24 Cannon Street;
- **Point 4**: 69-71 Castle Street;
- **Point 5**: 15 Market Square;
- **Point 6**: 4 Bench Street

A map of the enumeration points can be found in Appendix 3.

One dedicated enumerator was deployed to each location on each day, counting the number of pedestrians passing left and right for each location continuously between 10.00 and 16.00, in 15-minute segments. Counts excluded children aged 7 or under, vagrants, post-persons, traffic wardens, police and delivery men / women.

The counts were conducted between 10am and 4pm. To provide a sample across a weekday and a weekend, counts were conducted on two days; Thursday 22nd February and Saturday 24th February 2018.

The fieldwork was conducted by our highly experienced and professional market research interviewers working to the Code of Practice and quality assurance of The Market Research Society, to which we subscribe.

1.3 Analysis

The 15-minute raw counts were multiplied by a factor of 3.529 to give a footfall per hour. Footfall counts for the trading periods of 9am-10am and 4pm-5pm were modelled from the overall hourly pattern measured across the day and were modelled iteratively to have an overall hourly index approximately half that of the adjacent hour, with the total then split across the days proportionally to daily footfalls.

---

[1] *Located between Townwall Street, Castle Street, Russell Street, and Woolcomber Street in Dover.*

Results

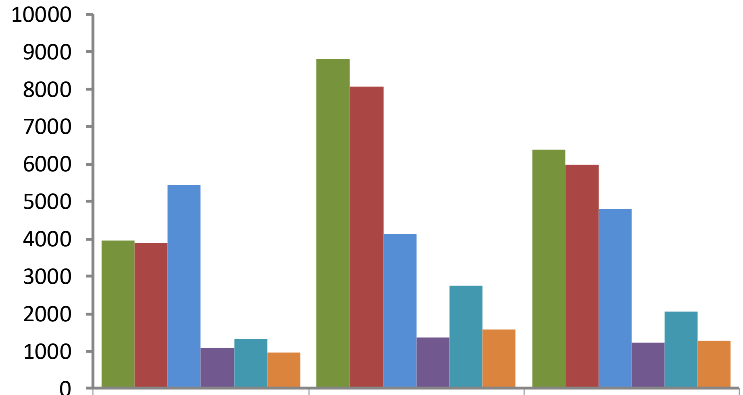
2.1 Footfall patterns by day

The two Biggin Street locations registered as the busiest, with average footfall counts of 6378 and 5967 per day (compared to between 1222 and 4792 for the other four locations); Biggin Street footfall was largely bolstered by Saturday visitors, which was twice that recorded on a Thursday for these two locations.

Average daily footfall outside 24 Cannon Street was the busiest out of all six locations on the Thursday yet decreased on the Saturday by around 25% from 5451 to 4132.

Of the two days monitored, Saturday was clearly the busiest overall with five of the six locations (Cannon Street was the only location to record a decline in numbers on a Saturday) displaying significant increases in footfall of between 1.25x and 2.2x (see Fig 1 below).

Fig 1: Footfall patterns at each location by day



	Thursday	Saturday	Average
65-66 Biggin Street	3957	8799	6378
Outside 28 Biggin Street	3885	8048	5967
24 Cannon Street	5451	4132	4792
Outside 69-71 Castle Street	1089	1354	1222
15 Market Square	1346	2738	2042
4 Bench Street	965	1578	1272

2.2 Footfall patterns by time of day

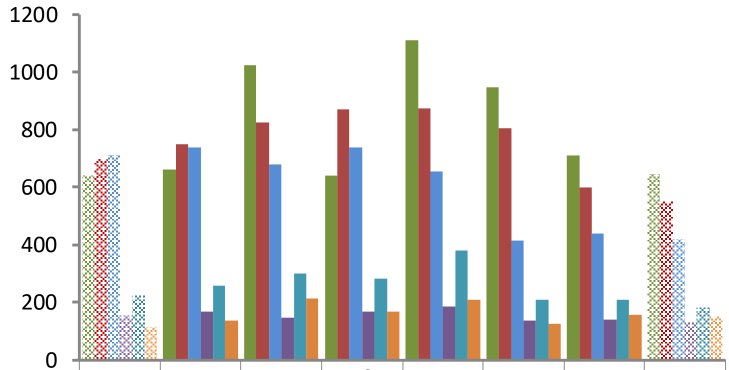
Looking at the footfall across the trading day, the peak footfall is between 11am and 2pm. The morning appears to be busier than the late afternoon, despite the early afternoon footfall being boosted by the peak mid-day figures.

Cannon Street exhibited consistent footfall between 9am and 1pm, declining notably from 2pm onwards.

While 65-66 Biggin Street dipping slightly between 12pm and 1pm, 28 Biggin Street did not show such a dip footfall between the same period, maintaining a largely consistent footfall between 11am and 3pm. Both Biggin Street locales registered a notable and sustained decline in footfall as the afternoon progressed.

Fig 2 below shows the details for each trading hour.

Fig 2: Footfall patterns by time of day (hr starting) for each location



	9am	10am	11am	12 noon	1pm	2pm	3pm	4pm
65-66 Biggin Street	640	660	1024	643	1109	946	712	645
Outside 28 Biggin Street	695	749	827	871	873	803	599	551
24 Cannon Street	710	740	680	738	655	414	438	418
Outside 69-71 Castle Street	153	168	146	169	184	136	140	129
15 Market Square	225	258	300	283	379	208	211	180
4 Bench Street	111	138	213	166	211	125	158	150

Note: shaded blocks indicate modelled data

Appendix 1:

Raw Counts

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 1

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	65-66 Biggin Street	39	42	81	33
10.15 - 10.30	65-66 Biggin Street	44	47	91	37
10.30 - 10.45	65-66 Biggin Street	59	58	117	48
10.45 - 11.00	65-66 Biggin Street	55	48	103	42
11.00 - 11.15	65-66 Biggin Street	84	72	156	64
11.15 - 11.30	65-66 Biggin Street	47	42	89	37
	BREAK 1				
12.00 - 12.15	65-66 Biggin Street	67	52	119	49
12.15 - 12.30	65-66 Biggin Street	93	121	214	88
12.30 - 12.45	65-66 Biggin Street	56	37	93	38
12.45 - 13.00	65-66 Biggin Street	101	80	181	74
13.00 - 13.15	65-66 Biggin Street	73	71	144	59
13.15 - 13.30	65-66 Biggin Street	48	41	89	37
13.30 - 13.45	65-66 Biggin Street	129	114	243	100
13.45 - 14.00	65-66 Biggin Street	107	107	214	88
	BREAK 2				
14.30 - 14.45	65-66 Biggin Street	53	65	118	49
14.45 - 15.00	65-66 Biggin Street	67	76	143	59
15.00 - 15.15	65-66 Biggin Street	73	64	137	56
15.15 - 15.30	65-66 Biggin Street	58	50	108	44
15.30 - 15.45	65-66 Biggin Street	92	70	162	67
15.45 - 16.00	65-66 Biggin Street	36	33	69	28
		1381	**1290**	**2671**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 2

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	Outside 28 Biggin Street	52	47	99	47
10.15 - 10.30	Outside 28 Biggin Street	29	39	68	33
10.30 - 10.45	Outside 28 Biggin Street	81	79	160	77
10.45 - 11.00	Outside 28 Biggin Street	64	72	136	65
11.00 - 11.15	Outside 28 Biggin Street	97	83	180	86
11.15 - 11.30	Outside 28 Biggin Street	61	73	134	64
	BREAK 1				
12.00 - 12.15	Outside 28 Biggin Street	49	58	107	51
12.15 - 12.30	Outside 28 Biggin Street	108	101	209	100
12.30 - 12.45	Outside 28 Biggin Street	94	87	181	87
12.45 - 13.00	Outside 28 Biggin Street	63	72	135	65
13.00 - 13.15	Outside 28 Biggin Street	61	69	130	62
13.15 - 13.30	Outside 28 Biggin Street	74	63	137	66
13.30 - 13.45	Outside 28 Biggin Street	69	69	138	66
13.45 - 14.00	Outside 28 Biggin Street	70	65	135	65
	BREAK 2				
14.30 - 14.45	Outside 28 Biggin Street	54	66	120	57
14.45 - 15.00	Outside 28 Biggin Street	40	41	81	39
15.00 - 15.15	Outside 28 Biggin Street	39	44	83	40
15.15 - 15.30	Outside 28 Biggin Street	60	61	121	58
15.30 - 15.45	Outside 28 Biggin Street	63	67	130	62
15.45 - 16.00	Outside 28 Biggin Street	36	38	74	35
		1264	**1294**	**2558**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 3

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	24 Cannon Street	101	114	215	82
10.15 - 10.30	24 Cannon Street	73	90	163	62
10.30 - 10.45	24 Cannon Street	92	80	172	66
10.45 - 11.00	24 Cannon Street	87	87	174	67
11.00 - 11.15	24 Cannon Street	86	87	173	66
11.15 - 11.30	24 Cannon Street	61	51	112	43
	BREAK 1				
12.00 - 12.15	24 Cannon Street	78	111	189	72
12.15 - 12.30	24 Cannon Street	129	113	242	93
12.30 - 12.45	24 Cannon Street	99	82	181	69
12.45 - 13.00	24 Cannon Street	131	130	261	100
13.00 - 13.15	24 Cannon Street	113	102	215	82
13.15 - 13.30	24 Cannon Street	118	127	245	94
13.30 - 13.45	24 Cannon Street	119	91	210	80
13.45 - 14.00	24 Cannon Street	97	81	178	68
	BREAK 2				
14.30 - 14.45	24 Cannon Street	**74**	**75**	149	57
14.45 - 15.00	24 Cannon Street	**59**	**54**	113	43
15.00 - 15.15	24 Cannon Street	**80**	**66**	146	56
15.15 - 15.30	24 Cannon Street	**106**	**49**	155	59
15.30 - 15.45	24 Cannon Street	**103**	**84**	187	72
15.45 - 16.00	24 Cannon Street	**56**	**68**	124	48
		1862	**1742**	**3604**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 4

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	Outside 69-71 Castle Street	14	22	36	75
10.15 - 10.30	Outside 69-71 Castle Street	14	15	29	60
10.30 - 10.45	Outside 69-71 Castle Street	17	18	35	73
10.45 - 11.00	Outside 69-71 Castle Street	21	18	39	81
11.00 - 11.15	Outside 69-71 Castle Street	17	12	29	60
11.15 - 11.30	Outside 69-71 Castle Street	28	13	41	85
	BREAK 1				
12.00 - 12.15	Outside 69-71 Castle Street	14	21	35	73
12.15 - 12.30	Outside 69-71 Castle Street	22	21	43	90
12.30 - 12.45	Outside 69-71 Castle Street	16	25	41	85
12.45 - 13.00	Outside 69-71 Castle Street	20	24	44	92
13.00 - 13.15	Outside 69-71 Castle Street	29	19	48	100
13.15 - 13.30	Outside 69-71 Castle Street	14	16	30	63
13.30 - 13.45	Outside 69-71 Castle Street	20	14	34	71
13.45 - 14.00	Outside 69-71 Castle Street	22	26	48	100
	BREAK 2				
14.30 - 14.45	Outside 69-71 Castle Street	13	7	20	42
14.45 - 15.00	Outside 69-71 Castle Street	20	15	35	73
15.00 - 15.15	Outside 69-71 Castle Street	11	10	21	44
15.15 - 15.30	Outside 69-71 Castle Street	23	16	39	81
15.30 - 15.45	Outside 69-71 Castle Street	21	9	30	63
15.45 - 16.00	Outside 69-71 Castle Street	21	16	37	77
		377	**337**	**714**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 5

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	15 Market Square	15	22	37	51
10.15 - 10.30	15 Market Square	14	25	39	53
10.30 - 10.45	15 Market Square	26	14	40	55
10.45 - 11.00	15 Market Square	19	23	42	58
11.00 - 11.15	15 Market Square	20	13	33	45
11.15 - 11.30	15 Market Square	10	19	29	40
	BREAK 1				
12.00 - 12.15	15 Market Square	21	21	42	58
12.15 - 12.30	15 Market Square	29	34	63	86
12.30 - 12.45	15 Market Square	35	36	71	97
12.45 - 13.00	15 Market Square	20	53	73	100
13.00 - 13.15	15 Market Square	19	42	61	84
13.15 - 13.30	15 Market Square	27	42	69	95
13.30 - 13.45	15 Market Square	14	29	43	59
13.45 - 14.00	15 Market Square	33	32	65	89
	BREAK 2				
14.30 - 14.45	15 Market Square	16	17	33	45
14.45 - 15.00	15 Market Square	13	15	28	38
15.00 - 15.15	15 Market Square	20	26	46	63
15.15 - 15.30	15 Market Square	24	10	34	47
15.30 - 15.45	15 Market Square	16	32	48	66
15.45 - 16.00	15 Market Square	14	29	43	59
		405	**534**	**939**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Thursday 22nd February 2018

Location 6

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	4 Bench Street	1	4	5	9
10.15 - 10.30	4 Bench Street	11	12	23	41
10.30 - 10.45	4 Bench Street	5	21	26	46
10.45 - 11.00	4 Bench Street	21	13	34	61
11.00 - 11.15	4 Bench Street	12	22	34	61
11.15 - 11.30	4 Bench Street	14	18	32	57
	BREAK 1				
12.00 - 12.15	4 Bench Street	10	13	23	41
12.15 - 12.30	4 Bench Street	10	12	22	39
12.30 - 12.45	4 Bench Street	20	36	56	100
12.45 - 13.00	4 Bench Street	30	25	55	98
13.00 - 13.15	4 Bench Street	10	14	24	43
13.15 - 13.30	4 Bench Street	35	21	56	100
13.30 - 13.45	4 Bench Street	27	18	45	80
13.45 - 14.00	4 Bench Street	25	26	51	91
	BREAK 2				
14.30 - 14.45	4 Bench Street	12	19	31	55
14.45 - 15.00	4 Bench Street	12	14	26	46
15.00 - 15.15	4 Bench Street	15	15	30	54
15.15 - 15.30	4 Bench Street	11	18	29	52
15.30 - 15.45	4 Bench Street	16	18	34	61
15.45 - 16.00	4 Bench Street	12	13	25	45
		309	**352**	**661**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 1

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	65-66 Biggin Street	118	139	257	60
10.15 - 10.30	65-66 Biggin Street	105	136	241	56
10.30 - 10.45	65-66 Biggin Street	47	50	97	23
10.45 - 11.00	65-66 Biggin Street	162	171	333	78
11.00 - 11.15	65-66 Biggin Street	165	194	359	84
11.15 - 11.30	65-66 Biggin Street	160	192	352	82
11.30 - 11.45	65-66 Biggin Street	232	187	419	98
11.45 - 12.00	65-66 Biggin Street	205	222	427	100
	BREAK 1				
12.30 - 12.45	65-66 Biggin Street	147	192	339	79
12.45 - 13.00	65-66 Biggin Street	165	186	351	82
13.00 - 13.15	65-66 Biggin Street	180	237	417	98
13.15 - 13.30	65-66 Biggin Street	166	201	367	86
13.30 - 13.45	65-66 Biggin Street	212	181	393	92
13.45 - 14.00	65-66 Biggin Street	192	212	404	95
14.00 - 14.15	65-66 Biggin Street	132	149	281	66
	BREAK 2				
14.45 - 15.00	65-66 Biggin Street	155	153	308	72
15.00 - 15.15	65-66 Biggin Street	116	166	282	66
15.15 - 15.30	65-66 Biggin Street	166	192	358	84
15.30 - 15.45	65-66 Biggin Street	96	93	189	44
15.45 - 16.00	65-66 Biggin Street	126	147	273	64
		3047	**3400**	**6447**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 2

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	Outside 28 Biggin Street	119	95	214	60
10.15 - 10.30	Outside 28 Biggin Street	91	126	217	61
10.30 - 10.45	Outside 28 Biggin Street	137	156	293	82
10.45 - 11.00	Outside 28 Biggin Street	116	194	310	87
11.00 - 11.15	Outside 28 Biggin Street	154	155	309	86
11.15 - 11.30	Outside 28 Biggin Street	70	50	120	34
11.30 - 11.45	Outside 28 Biggin Street	123	213	336	94
11.45 - 12.00	Outside 28 Biggin Street	117	143	260	73
	BREAK 1				
12.30 - 12.45	Outside 28 Biggin Street	151	132	283	79
12.45 - 13.00	Outside 28 Biggin Street	122	150	272	76
13.00 - 13.15	Outside 28 Biggin Street	138	191	329	92
13.15 - 13.30	Outside 28 Biggin Street	155	140	295	82
13.30 - 13.45	Outside 28 Biggin Street	163	128	291	81
13.45 - 14.00	Outside 28 Biggin Street	152	138	290	81
14.00 - 14.15	Outside 28 Biggin Street	181	177	358	100
	BREAK 2				
14.45 - 15.00	Outside 28 Biggin Street	133	111	244	68
15.00 - 15.15	Outside 28 Biggin Street	116	92	208	58
15.15 - 15.30	Outside 28 Biggin Street	140	84	224	63
15.30 - 15.45	Outside 28 Biggin Street	102	96	198	55
15.45 - 16.00	Outside 28 Biggin Street	85	75	160	45
		2565	**2646**	**5211**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 3

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	24 Cannon Street	92	78	170	76
10.15 - 10.30	24 Cannon Street	114	79	193	86
10.30 - 10.45	24 Cannon Street	104	92	196	88
10.45 - 11.00	24 Cannon Street	126	71	197	88
11.00 - 11.15	24 Cannon Street	138	86	224	100
11.15 - 11.30	24 Cannon Street	82	93	175	78
11.30 - 11.45	24 Cannon Street	85	100	185	83
11.45 - 12.00	24 Cannon Street	133	73	206	92
	BREAK 1				
12.30 - 12.45	24 Cannon Street	74	82	156	70
12.45 - 13.00	24 Cannon Street	75	70	145	65
13.00 - 13.15	24 Cannon Street	64	69	133	59
13.15 - 13.30	24 Cannon Street	79	70	149	67
13.30 - 13.45	24 Cannon Street	45	37	82	37
13.45 - 14.00	24 Cannon Street	52	46	98	44
14.00 - 14.15	24 Cannon Street	41	35	76	34
	BREAK 2				
14.45 - 15.00	24 Cannon Street	37	39	76	34
15.00 - 15.15	24 Cannon Street	40	31	71	32
15.15 - 15.30	24 Cannon Street	33	28	61	27
15.30 - 15.45	24 Cannon Street	29	24	53	24
15.45 - 16.00	24 Cannon Street	33	45	78	35
		1476	**1248**	**2724**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 4

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	Outside 69-71 Castle Street	33	21	54	77
10.15 - 10.30	Outside 69-71 Castle Street	20	18	38	54
10.30 - 10.45	Outside 69-71 Castle Street	17	17	34	49
10.45 - 11.00	Outside 69-71 Castle Street	29	41	70	100
11.00 - 11.15	Outside 69-71 Castle Street	22	19	41	59
11.15 - 11.30	Outside 69-71 Castle Street	20	16	36	51
11.30 - 11.45	Outside 69-71 Castle Street	14	19	33	47
11.45 - 12.00	Outside 69-71 Castle Street	19	22	41	59
	BREAK 1				
12.30 - 12.45	Outside 69-71 Castle Street	16	15	31	44
12.45 - 13.00	Outside 69-71 Castle Street	27	29	56	80
13.00 - 13.15	Outside 69-71 Castle Street	30	15	45	64
13.15 - 13.30	Outside 69-71 Castle Street	28	18	46	66
13.30 - 13.45	Outside 69-71 Castle Street	27	31	58	83
13.45 - 14.00	Outside 69-71 Castle Street	39	19	58	83
14.00 - 14.15	Outside 69-71 Castle Street	14	18	32	46
	BREAK 2				
14.45 - 15.00	Outside 69-71 Castle Street	28	21	49	70
15.00 - 15.15	Outside 69-71 Castle Street	27	23	50	71
15.15 - 15.30	Outside 69-71 Castle Street	12	14	26	37
15.30 - 15.45	Outside 69-71 Castle Street	18	8	26	37
15.45 - 16.00	Outside 69-71 Castle Street	31	19	50	71
		471	**403**	**874**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 5

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	15 Market Square	17	19	36	24
10.15 - 10.30	15 Market Square	51	50	101	68
10.30 - 10.45	15 Market Square	44	29	73	49
10.45 - 11.00	15 Market Square	63	85	148	100
11.00 - 11.15	15 Market Square	62	81	143	97
11.15 - 11.30	15 Market Square	53	48	101	68
11.30 - 11.45	15 Market Square	68	57	125	84
11.45 - 12.00	15 Market Square	52	54	106	72
	BREAK 1				
12.30 - 12.45	15 Market Square	40	24	64	43
12.45 - 13.00	15 Market Square	44	50	94	64
13.00 - 13.15	15 Market Square	67	62	129	87
13.15 - 13.30	15 Market Square	74	51	125	84
13.30 - 13.45	15 Market Square	61	70	131	89
13.45 - 14.00	15 Market Square	70	64	134	91
14.00 - 14.15	15 Market Square	52	38	90	61
	BREAK 2				
14.45 - 15.00	15 Market Square	34	23	57	39
15.00 - 15.15	15 Market Square	56	46	102	69
15.15 - 15.30	15 Market Square	38	21	59	40
15.30 - 15.45	15 Market Square	29	26	55	37
15.45 - 16.00	15 Market Square	18	17	35	24
		993	**915**	**1908**	

NEMS Market Research

DOVER PEDESTRIAN COUNTS

Saturday 24th February 2018

Location 6

Time	Location	Left to Right	Right to Left	Total	Index
10.00 - 10.15	4 Bench Street	5	6	11	12
10.15 - 10.30	4 Bench Street	24	27	51	55
10.30 - 10.45	4 Bench Street	17	40	57	62
10.45 - 11.00	4 Bench Street	37	31	68	74
11.00 - 11.15	4 Bench Street	64	28	92	100
11.15 - 11.30	4 Bench Street	32	35	67	73
11.30 - 11.45	4 Bench Street	38	24	62	67
11.45 - 12.00	4 Bench Street	41	32	73	79
	BREAK 1				
12.30 - 12.45	4 Bench Street	32	20	52	57
12.45 - 13.00	4 Bench Street	15	21	36	39
13.00 - 13.15	4 Bench Street	31	34	65	71
13.15 - 13.30	4 Bench Street	26	22	48	52
13.30 - 13.45	4 Bench Street	37	32	69	75
13.45 - 14.00	4 Bench Street	32	32	64	70
14.00 - 14.15	4 Bench Street	17	20	37	40
	BREAK 2				
14.45 - 15.00	4 Bench Street	11	20	31	34
15.00 - 15.15	4 Bench Street	32	41	73	79
15.15 - 15.30	4 Bench Street	14	42	56	61
15.30 - 15.45	4 Bench Street	22	24	46	50
15.45 - 16.00	4 Bench Street	11	12	23	25
		538	**543**	**1081**	

Appendix 2:

Summary Counts

NEMS Market Research

DOVER PEDESTRIAN COUNT SUMMARIES

THURSDAY 22ND FEB AND SATURDAY 24TH FEB 2018

Point 1 - 65-66 Biggin Street

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	360	920	640	80
10am	392	928	660	83
11am	490	1557	1024	128
12 noon	607	678	643	81
1pm	690	1528	1109	139
2pm	522	1370	946	119
3pm	476	948	712	89
4pm (modelled)	420	870	645	81
TOTAL	**3957**	**8799**	**6378**	

Point 2 - Outside 28 Biggin Street

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	420	970	695	93
10am	463	1034	749	100
11am	628	1025	827	111
12 noon	632	1110	871	117
1pm	540	1205	873	117
2pm	402	1204	803	108
3pm	408	790	599	80
4pm (modelled)	392	710	551	74
TOTAL	**3885**	**8048**	**5967**	

Point 3 - 24 Cannon Street

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	700	720	710	95
10am	724	756	740	99
11am	570	790	680	91
12 noon	873	602	738	99
1pm	848	462	655	88
2pm	524	304	414	56
3pm	612	263	438	59
4pm (modelled)	600	235	418	56
TOTAL	**5451**	**4132**	**4792**	

Point 4 - Outside 69-71 Castle Street

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	135	170	153	20
10am	139	196	168	22
11am	140	151	146	20
12 noon	163	174	169	23
1pm	160	207	184	25
2pm	110	162	136	18
3pm	127	152	140	19
4pm (modelled)	115	142	129	17
TOTAL	**1089**	**1354**	**1222**	

Point 5 - 15 Market Square

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	144	305	225	30
10am	158	358	258	35
11am	124	475	300	40
12 noon	249	316	283	38
1pm	238	519	379	51
2pm	122	294	208	28
3pm	171	251	211	28
4pm (modelled)	140	220	180	24
TOTAL	**1346**	**2738**	**2042**	

Point 6 - 4 Bench Street

Hr starting	Day: Thurs 22	Sat 24	Average	Index
9am (modelled)	71	151	111	15
10am	88	187	138	18
11am	132	294	213	29
12 noon	156	176	166	22
1pm	176	246	211	28
2pm	114	136	125	17
3pm	118	198	158	21
4pm (modelled)	110	190	150	20
TOTAL	**965**	**1578**	**1272**	

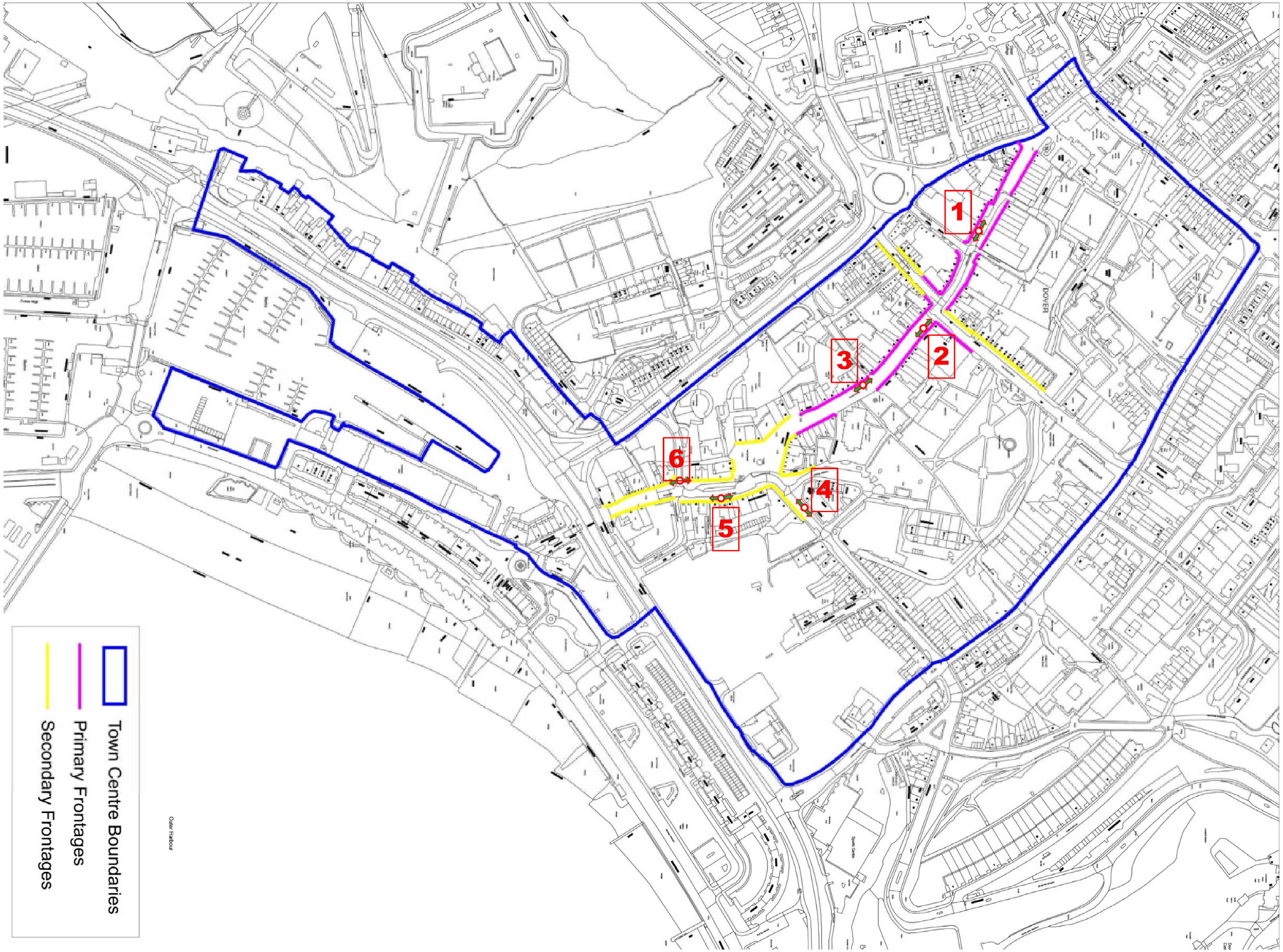
Red text denotes modelled data

Sum of raw counts:

Point 1	900	1986
Point 2	871	1804
Point 3	1176	900
Point 4	238	295
Point 5	301	627
Point 6	222	350

Appendix 3:

Centre plan showing count locations


1
2
3
4
5
6
DOVER
Town Centre Boundaries
Primary Frontages
Secondary Frontages