

DOVER DISTRICT COUNCIL RETAIL AND TOWN CENTRE NEEDS ASSESSMENT (RTCNA) - 2021 UPDATE

for:

Dover District Council

**FINAL
Volume 2:
Town Centre
Shopping Patterns
and Healthchecks**

October 2021

Reviewed by:



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For and on behalf of Lambert Smith Hampton

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1. Introduction

- 1.1 As detailed in **Volume 1**, this assessment represents a partial update of the **2018 Retail and Town Centre Needs Assessment (2018 RTCNA)**. On this basis the Council has decided not to refresh the Study Area and Shopping Patterns and the Healthchecks across the centres of the DDC area (i.e. previously Chapters 4, 5, 6, 7, 8, 9 of the 2018 RTCNA). This is to allow for more time for normalised shopping patterns and behaviour as lockdown restrictions ease. On this basis the contents of the subsequent sections in this volume replicate the findings of the 2018 RTCNA, specifically the Study Area and Shopping Patterns and the Healthchecks as follows:
 - Section 4 of the 2018 RTCNA – that 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 2017 household telephone interview survey (HTIS).
 - Section(s) 5-9 of the 2018 RTCNA – that set out the health check methodology and key findings for the Council's main town centres of Dover, Deal and Sandwich.
- 1.2 It should be made clear at the outset that we recommend that these healthchecks and the HTIS should be updated once the Council considers that conditions have settled across its centres in the post-pandemic period.
- 1.3 Notwithstanding the above, LSH has undertaken a broad review of retail composition and vacancies on Dover, Deal and Sandwich to inform the current update. This is based on the latest available Experian GOAD information, summarised and compared against the 2018 RTCNA below.

Table 1.1: DDC Area: Current Retail and Service Offer By Units

DOVER		Number of Outlets			% of Total Outlets			UK (%)		
Category		2021	2018	2016	2021	2018	2016	2021	2018	2016
Comparison		80	104	89	23.32%	28.80%	28.20%	27.27%	30.90%	31.50%
Convenience		32	26	25	9.33%	7.20%	7.90%	9.14%	8.90%	8.70%
Retail Service		43	42	34	12.54%	11.60%	10.80%	15.62%	14.50%	14.30%
Leisure Service		90	102	86	26.24%	28.30%	27.20%	24.51%	24.00%	23.70%
Financial & Business Service		33	32	36	9.62%	8.90%	11.40%	9.20%	10.30%	10.40%
Vacant Retail & Service Outlets		65	55	46	18.95%	15.20%	14.60%	14.04%	11.20%	11.10%
TOTAL:		343	361	316	100%	100%	100%	100%	100%	100%

DEAL		Number of Outlets			% of Total Outlets			UK (%)		
Category		2021	2018	2016	2021	2018	2016	2021	2018	2016
Comparison		91	94	88	33.83%	36.60%	34.40%	27.27%	30.90%	31.50%
Convenience		25	21	25	9.29%	8.20%	9.80%	9.14%	8.90%	8.70%
Retail Service		36	29	31	13.38%	11.30%	12.10%	15.62%	14.50%	14.30%
Leisure Service		82	78	75	30.48%	30.40%	29.30%	24.51%	24.00%	23.70%
Financial & Business Service		24	20	22	8.92%	7.80%	8.60%	9.20%	10.30%	10.40%
Vacant Retail & Service Outlets		11	15	15	4.09%	5.80%	5.90%	14.04%	11.20%	11.10%
TOTAL:		269	257	256	100%	100%	100%	100%	100%	100%

SANDWICH		Number of Outlets			% of Total Outlets			UK (%)		
Category		2021	2018	2015	2021	2018	2015	2021	2018	2016
Comparison		38	39	37	36.54%	35.10%	35.60%	27.27%	30.90%	31.50%
Convenience		7	9	10	7.63%	8.10%	9.60%	9.14%	8.90%	8.70%
Retail Service		15	15	13	14.42%	13.50%	12.50%	15.62%	14.50%	14.30%
Leisure Service		24	28	25	23.08%	25.20%	24.00%	24.51%	24.00%	23.70%
Financial & Business Service		6	14	9	5.77%	12.60%	8.70%	9.20%	10.30%	10.40%
Vacant Retail & Service Outlets		14	6	10	13.46%	5.40%	9.60%	14.04%	11.20%	11.10%
TOTAL:		104	111	104	101%	100%	100%	100%	100%	100%

Source: 2018 RTCNA & Experian Goad Category Reports (2021)

- 1.4 The key headlines by centre, and in terms of the composition of outlets by goods type, are as follows:

Dover

- Vacant outlets have increased by 10 outlets resulting in a vacancy rate of c.19% compared with 15.2% in 2018 and 14.6% in 2016. The current rate is above the national rate of 14%.
- Proportion of comparison goods outlets has decreased to 23% from 28% in 2018.
- Convenience goods outlets have increased to 9.3% from 7.2% previously.
- Leisure services outlets have decreased to 26.2% from 28.3% in 2018.
- In the light of the rising vacancies highest rate since 2016 it will be important for the Council to monitor these proactively and to ascertain their regeneration and repurposing potential to attract uses that generate footfall and maintain the vitality and viability of the centre.

Deal

- Unlike many other centres the level of vacant outlets has decreased by 4 outlets resulting in a vacancy rate of 4.1% compared with 5.8% in 2018. This is substantially lower than the national rate of 14%.
- Proportion of comparison goods outlets has decreased to 33.8% from 36.6% in 2018.
- Convenience goods outlets have increased to 9.3% from 8.2% previously.

-
- Leisure services outlets remained broadly the same at c.30.5%.
 - The lower than average vacancy rates over the pandemic period is reflective of the Deal's diversity in its offer (good level of independent provision and national multiples together with its street markets), local patronage as well as the centre's compact nature and historic pattern. The Council needs to ensure that this vitality is enhanced through the wider Destination White Cliffs Country Tourism Strategy.

Sandwich

- Vacant outlets have increased by 8 outlets resulting in a vacancy rate of 13.5% which is more than double that of 5.4% in 2018. The current vacancy rate is approaching the national average of 14%.
- Proportion of comparison goods outlets has decreased marginally to 36.5% from 35.1% in 2018.
- Convenience goods outlets have also decreased to 7.6% from 8.2% previously.
- Leisure services outlets have decreased to 23.1% from 25.2% previously.
- The rise in vacant outlets will require proactive monitoring and in supporting existing businesses and building on the centre's medieval, golf and maritime heritage through the wider Destination White Cliffs Country Tourism Strategy.

2. 2018 RTCNA Outputs

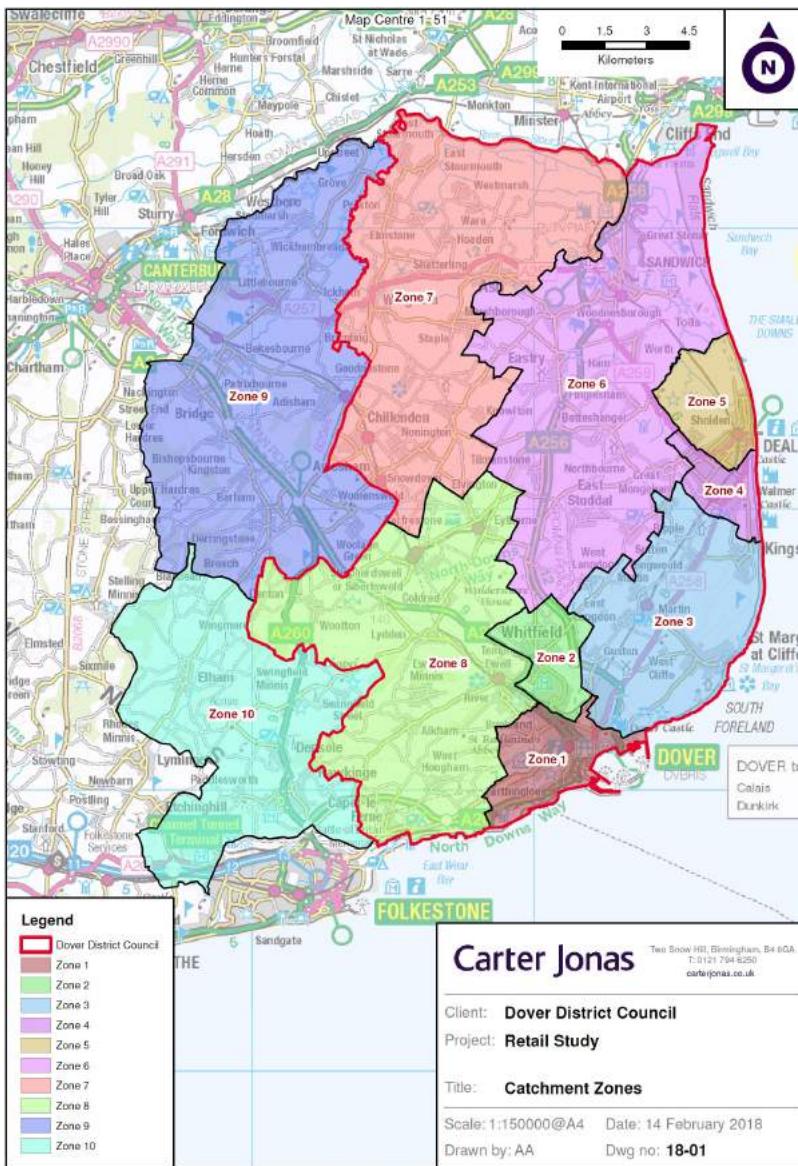
4. STUDY AREA & SHOPPING PATTERNS

- 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**).

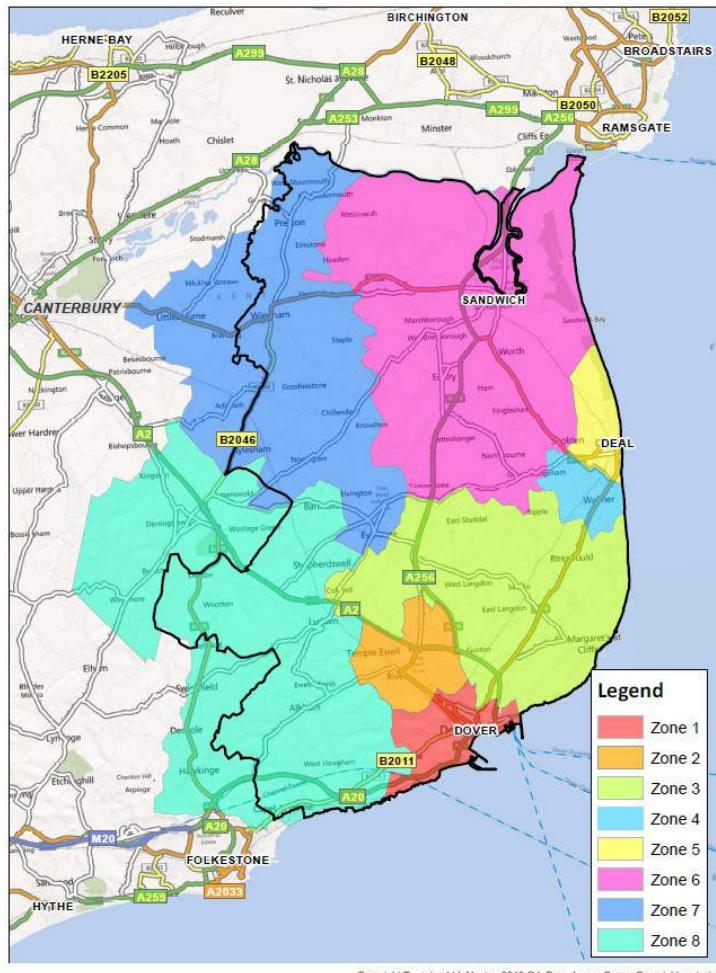
Figure 4.1: Study Area



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- 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 projections¹⁹.

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

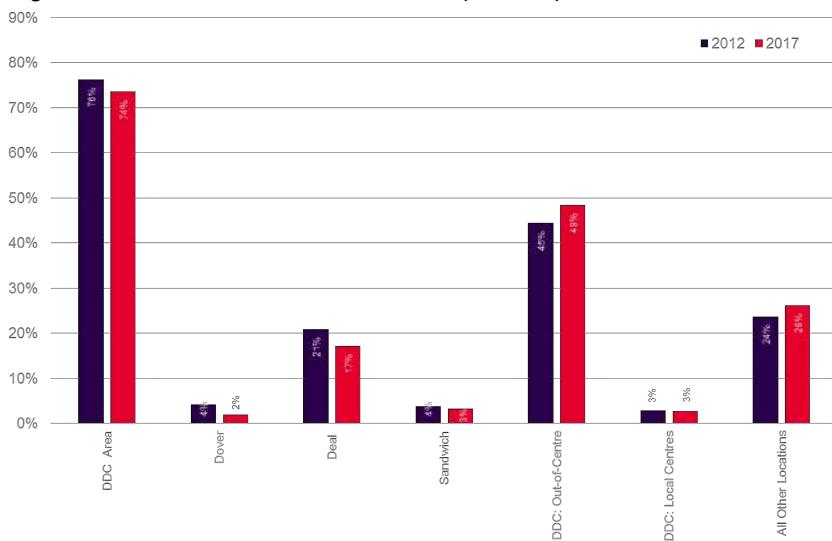
Location	Study Area (Zones 1 – 10)
Dover Town Centre	1.9%
Deal Town Centre	16.0%
Sandwich Town Centre	3.1%
All Other Local & Village Centres	2.7%
All Out-of-Centre	45.8%
Total	69.5%

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 RSU²⁰, 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

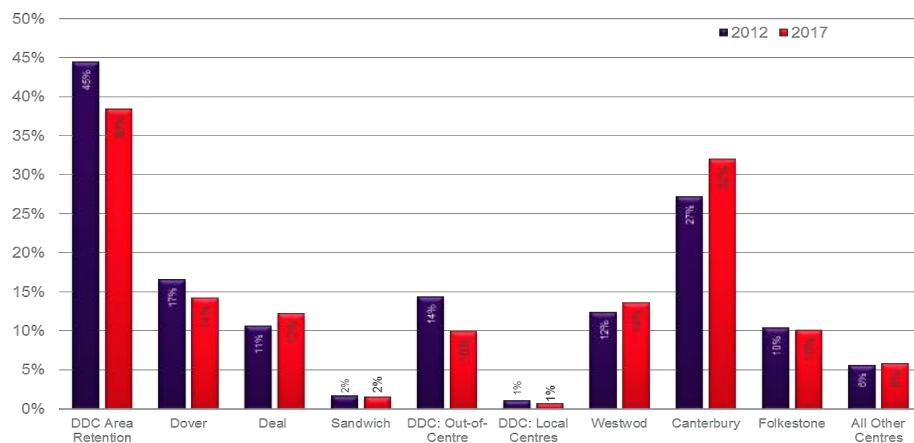
- 4.25 Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods. The household survey comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest RPBN15, including: 'clothing 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 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.

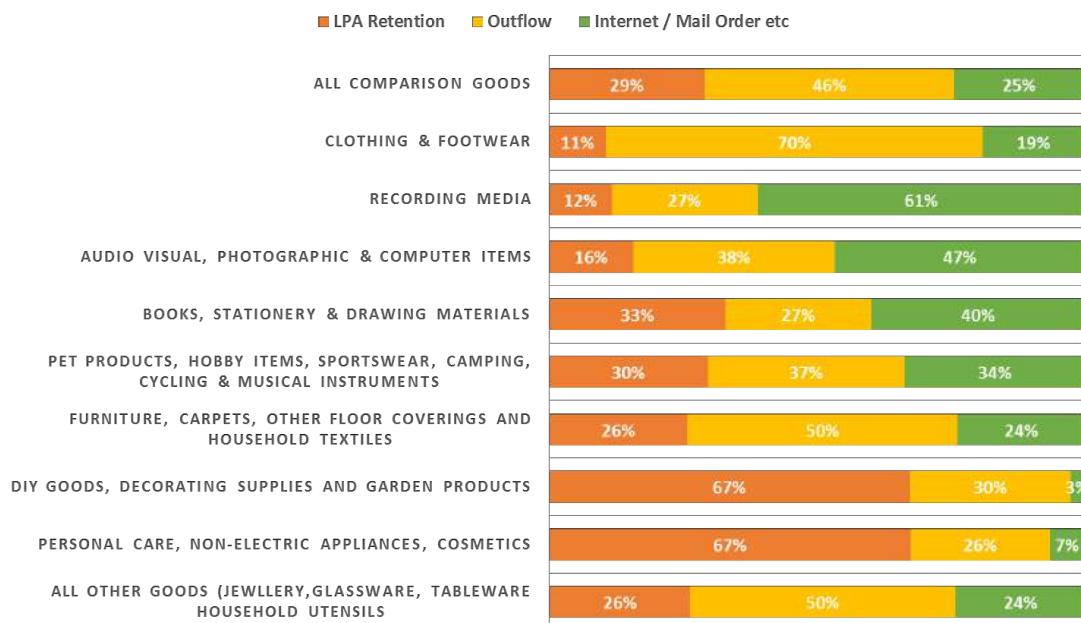
- 4.29 By way of comparison, the market share for SFT in the 2012 RSU was 7.1% whilst this has increased markedly in the current assessment to 24.5%. This is an indication of the shifting pattern of consumer behaviour and associated spending with resultant implications for future floorspace capacity.
- 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 RSU²¹, 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**).

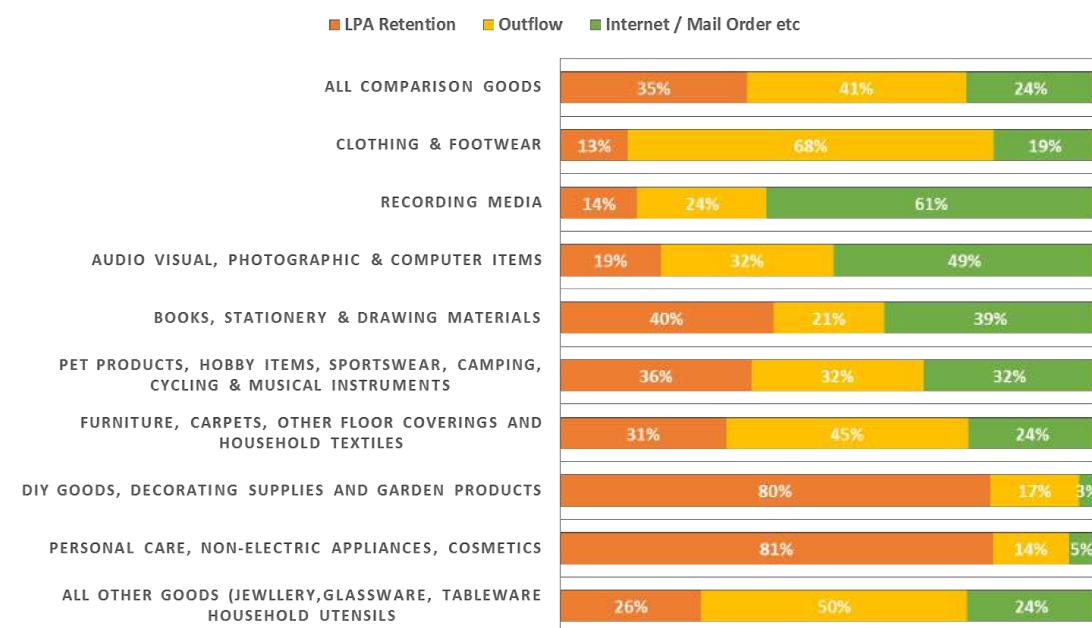
Figure 4.5: Comparison Goods market shares for the study area (Zones 1-10)

- 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 RSU²² 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 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 reports²³ 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 Reports²⁴. 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 Rents²⁵ 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 eighth.

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 units²⁶ 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 centre²⁷ 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 Bradley 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 Waterfront 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 @ Home²⁸, 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.

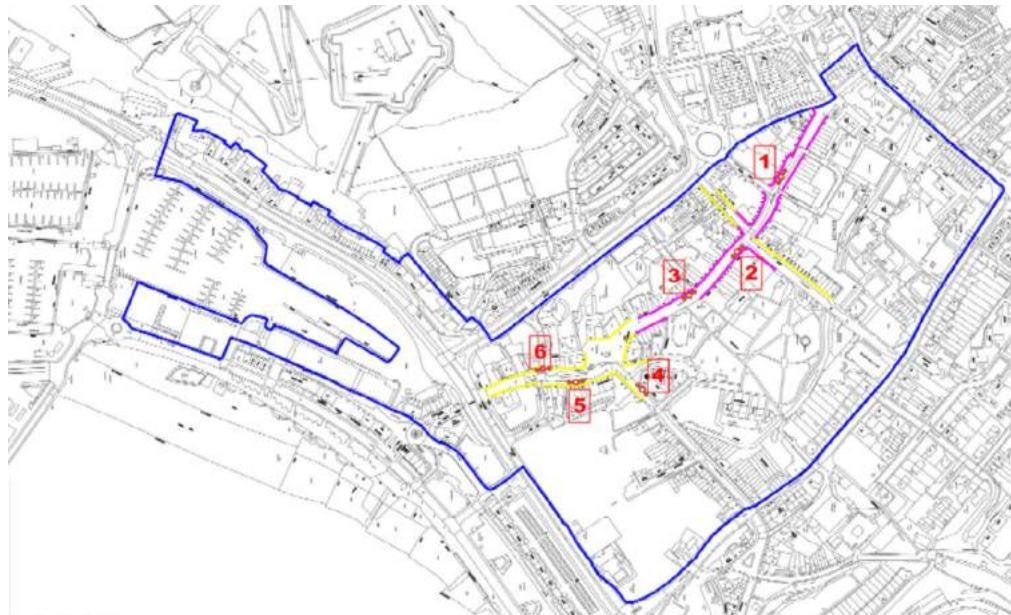
- 6.43 Overall, whilst public transport accessibility in Dover Town Centre is considered to be good, pedestrian and vehicular improvements are required to join the main town centre with the waterfront and thus overcome the current severing effect of the A20.

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



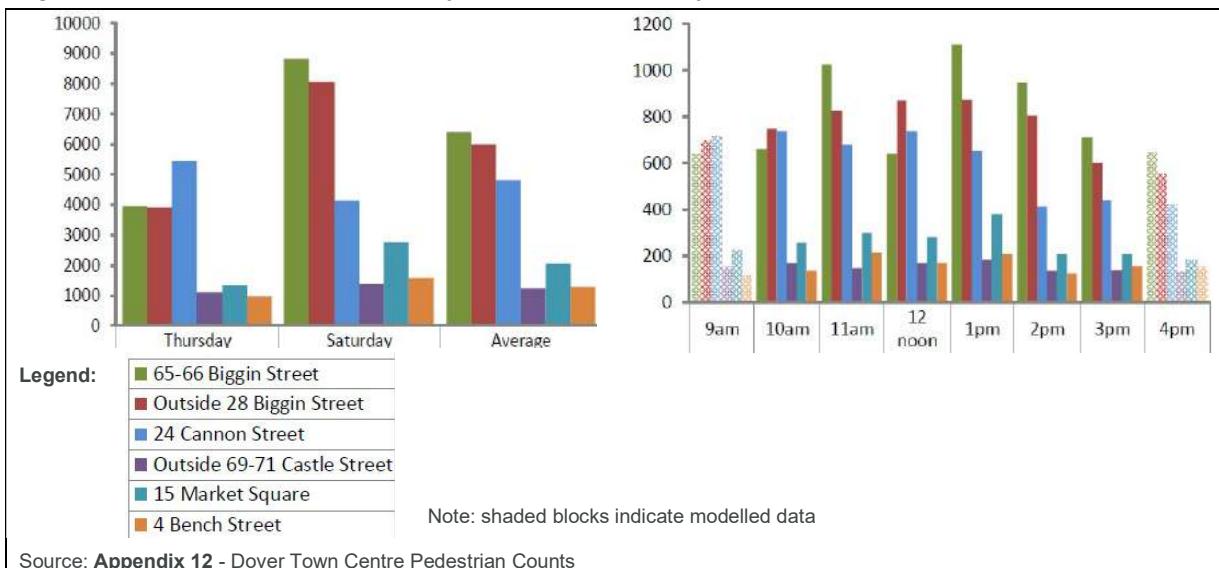
Source: **Appendix 12** - Dover Town Centre Pedestrian Counts

- 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



- 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 store³⁰.
- 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 centre³¹ 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%.

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 identified³² 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 Street³³.

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 retailer³⁴ 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 public 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.

