Canterbury Retail and Leisure Study 2015

Canterbury City Council

June 2015

Prepared by

GL Hearn Limited
280 High Holborn
London WC1V 7EE

T +44 (0)20 7851 4900
F +44 (0)20 7851 4910
glhearn.com

Contents

Annexes

Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it is has been signed by the Originators and approved by a Business or Associate Director.

DATE	ORIGINATORS	APPROVED
12 June 2015	David Armstrong Planning Associate Director [redacted]	Nick Ireland Director [redacted]

Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1 INTRODUCTION

1.1 GL Hearn were appointed by Canterbury City Council (CCC) to undertake a Retail and Leisure Study that will feed into the evidence base underpinning the emerging Local Plan. The purpose of this retail study is to assess the current trading performance of retail destinations across Canterbury and establish the capacity for new retail floorspace balancing qualitative and quantitative considerations.

1.2 This study draws on a combination of on-site surveys and desk-top research, and is informed by a new household telephone survey (undertaken in May 2015) which gathers information on current expenditure patterns from 1,400 respondents across Canterbury City Council and the wider Kent region (see the Survey Area Map at Appendix A).

- **Section 2** sets out the national planning policy context for the commissioning of this report and its design and preparation;
- **Section 3** examines commercial and economic trends, involving shifts in on-line and out-of-centre retailing, that inform the retail outlook for town centres generally;
- **Section 4** reviews the health of Canterbury city centre;
- **Section 5** sets out our modelling methodology; we describe the parameters and inputs used in the study and explain our assumptions;
- **Section 6** examines the results of the household telephone survey, drawing conclusions about trading performance and shopping patterns;
- **Section 7** sets out our quantitative capacity assessment for new retail floorspace across the district.
- **Section 8** summarises our findings and makes a series of recommendations about the quantum and type of development that will be appropriate in different parts of Canterbury over the plan period.

2 NATIONAL POLICY CONTEXT OF THE STUDY

2.1 This section reviews the key elements of national planning policy guidance that provides the context for this study.

National Planning Policy Framework (NPPF)

2.2 The NPPF was published in March 2012. It replaces the raft of national Planning Policy Statements, Planning Policy Guidance and circulars with an all-encompassing document. At the heart of the NPPF is an overarching 'presumption in favour of sustainable development', which is intended to be held as a golden thread running through the planning system. It encourages Local Planning Authorities (LPAs) to positively seek opportunities to meet development needs and recognises that the planning system is plan-led.

2.3 Each LPA is charged with producing a Local Plan and the task of ensuring that such plans are based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. Local Plans are the starting point for the determination of any planning application.

2.4 In accordance with the NPPF LPAs should use the evidence base to assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres, and
- the capacity of existing centres to accommodate new town centre development.

2.5 The NPPF endorses the 'town centres first' approach to accommodating new development of main town centre uses, and that requires planning policies be drawn up to positively promote competitive town centres and manage their growth over the plan period. LPAs should plan for town centres by:

- Recognising town centres as the heart of their communities and pursue policies to support their viability and vitality;

- Defining a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Defining the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promoting competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive;
- Allocating a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- Setting policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognising that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

National Planning Policy Guidance (NPPG)

2.6 In March 2014 the Department for Communities and Local Government (DCLG) published the NPPG, which provides technical guidance on how to prepare a robust evidence base and to assess the impact of retail, office and leisure based proposals.

2.7 It states that the key to ensuring successful town centres (which enables sustainable economic growth and provide a wide range of social and environmental benefits) is to ensure that a positive vision or strategy for town centres is articulated through the Local Plan.

2.8 The NPPG states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should ascertain what the appropriate and realistic role, function and hierarchy of town centres are in the area over the plan period. This will involve auditing existing centres to assess their role, vitality, viability and potential to accommodate new development and different types of development. This assessment should cover a three-five year period, but should also take the lifetime of the Local Plan into account and be regularly reviewed.

2.9 The vision for the future of each town centre should consider what the most appropriate mix of uses would be to enhance overall vitality and viability.

2.10 The Strategy should assess whether the town centre can accommodate the scale of assessed need for main town centre uses. This should include considering expanding centres, or development opportunities to enable new development or redevelop existing under-utilised space. The strategy should also determine what timeframe new retail floorspace should be provided over, and what complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, as well as how can these be planned and delivered.

2.11 Strategies should identify changes in the hierarchy of town centres, including where a town centre is in decline. In such cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

2.12 The NPPG states that LPAs should take full account of relevant market signals when planning for town centres and keep their retail land allocations under regular review. These market signals should be identified and analysed in terms of their impacts on town centres. This information should be used to inform policies that are responsive to changes in the market as well as the changing needs of business.

Summary

2.13 This Retail Study has been commissioned, designed and drafted in accordance with the policy context outlined above and is intended to provide the Canterbury City Council with a robust, up-to-date evidence base upon which it can formulate the planning policies that will be incorporated into the emerging Local Plan.

3 NATIONAL RETAIL TRENDS

Historic trends

3.1 Over the past 30 years, the role and function of town centres has undergone dramatic change. The high street is no longer the main focus for convenience and comparison shopping as large out-of-centre developments in the form of retail parks and convenience superstores have diverted much retail expenditure and shopping trips. This has been exacerbated by the increasing trend of seeking to remove bulky-goods restrictions on units trading from retail parks at out-of-centre, as well as the gradual proportionate shift over time in the range of comparison goods that are stocked in large supermarkets at out-of-centre locations. The growing market share of internet shopping is adding to the pressure on high street shops. Town centres will need to adapt and re-imagine their role and function in order to compete, and they will need to rely on strong yet flexible policy support to survive.

3.2 Over-prioritisation of retailing in town centres has led to office space and key civic uses being relocated out-of-centre in order to free up development land in-centre, this has led to a reduction in activity and footfall in these centres which has negatively impacted the vitality of some centres.

Recent Trends

3.3 Squeezed expenditure and the drive for value shopping have led to the proliferation of deep-discounting foodstores and pound shops, which are increasingly fulfilling an anchoring role in some smaller and medium-sized centres.

3.4 The UK is emerging from a prolonged period of recession. There are positive signs that consumer spending and business investment are improving. Low inflation, strong employment growth and high levels of consumer and business confidence suggest sustained growth in the short to medium-term, albeit at a slower pace than was experienced during the last period of expansion due to the fact that fiscal restraints and weak exports are expected to exert a drag on growth generally.

3.5 The volume of retail sales have improved in this context, however heavy discounting and a period of deflation have acted as a countervailing constraint. Whilst recent trends indicate a strong upswing in the UK economy since early 2013, despite increased government borrowing, the preceding economic downturn has had a major impact on the retail sector nationally.

Internet shopping

3.6 Internet spending and other forms of retailing that are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT) includes all types of non-store retailing (internet, street markets and mail-order shopping) and in 2013 SFT was equivalent to 11.5% of total retailing (14% for comparison goods and 7% for convenience goods). Experian predict that by 2020 non-store sales (adjusted to take account of sales from stores with a physical presence) will reach 11.9% of total retail (15.5% for comparison goods and 4.2% for convenience).

3.7 The internet and advances in mobile technology are increasingly affecting shopping behaviour. The pace of growth in non-store retailing is starting to slow but is still expected to outpace the growth in traditional retail expenditure in the short to medium-term.

3.8 Home delivery has become very common, particularly in the convenience sector, where goods are sourced from stores with a physical presence. While some of this expenditure might end up as turnover in the same store as in a regular transaction, such 'store-to-door' transactions do not translate to activity on the high street and they remove the potential for linked shopping, this trend is undermining the anchoring role that large foodstore operators traditionally fulfil in well-configured centres.

3.9 There is a steepening trend for home delivery of comparison goods, which are commonly sourced from far afield (possibly even abroad), this trend results in increased leakage and reduces the volume of available expenditure that can support local traders on the high street.

3.10 Convenience operators and some comparison retailers, such as John Lewis, now offer a click-and-collect service where shoppers make their selection and purchase on-line but travel to a 'bricks-and-mortar' store to collect their goods. This form of retailing has the potential to contribute to the levels of vitality on the high street as shoppers are still compelled to visit retail centres to complete their transaction. This consequently creates opportunities for incidental shopping which can help underpin the viability of smaller operators who rely on pass-by trade.

3.11 Technological advancements and the ability to scan barcodes in-store and instantly research where the same item can be bought cheaper is driving competition and eroding retailers' profit margins. The rise of tablet and mobile technology is improving the browsing experience and facilitating on-line transactions. The distinction between on-line and in-store shopping channels is becoming less clear cut. The advent of click-and-collect and multi-channelling has meant that bricks-and-mortar stores will continue to play an important role in enhancing the shopping experience. There is evidence that more people are researching items on-line before making a purchase. Such multi-channelling, where the ultimate transaction is carried out in-store, or in cases where people touch and feel the goods in-store before buying on-line, mark an instance where the rise of the internet can bolster the performance of traditional brocks-and-mortar shops and the activity on the high street.

Comparison Shopping

3.12 Comparison retailing has been greatly affected by the economic cycle. A number of high street retailers have folded (Comet, Jessops, Blockbuster, Borders, JJB Sports, Woolworths, Peacocks, Fire trap, Habitat, Barratts, Past Times and Clinton Cards) leaving vacancies in town centres across the country. Retailers such as HMV and Game have drastically cut back the number of stores they operate. However comparison expenditure is set to improve over the coming years as the UK advances further out of recession; and while vacancies have increased substantially since 2007, in many towns the departure of national multiple retailers has created opportunities for independent retailers by removing strong competition and freeing up well situated premises for occupation.

Convenience Shopping

3.13 The pace of expansion of convenience operator representation has slowed dramatically with major foodstores easing their drive for large format stores. Small convenience stores have proliferated more recently with Tesco, Sainsbury's and Morrisons all competing for suitable sites in town centres and accessible edge or out-of-centre locations, however, there are already signs that this activity is starting to slow.

3.14 It is apparent that the traditional pattern of convenience expenditure is changing, people are starting to move away from the practice of undertaking a weekly main-food shop (traditionally assumed to represent approximately 80% of total convenience expenditure) and topping-up sporadically (accounting for the remaining 20% of convenience spend). Instead it seems that people are starting to undertake a greater number of smaller yet more frequent trips to a variety of locations. Constrained expenditure has encouraged people to undertake their main food shop at a number of destinations in order to economise and avail of specific in-store promotions at a number of different locations. Other people rely on big foodstore operators for their basic convenience goods and visit specialist retailers for certain items such as meat or fish.

3.15 The success of internet shopping and supermarket delivery services mean that a growing proportion of people are starting to secure durable the basic convenience goods in this way and top-up on fresh fruit, meat, fish and vegetables and baked goods as and when they need them, at a variety of locations. These kind of shopping habits are reinforced by community focused initiatives, the proliferation of street markets and the success/attractiveness of home-grown and organic produce.

3.16 The lines between traditionally distinct market segments in the convenience sector has begun to blur, with value operators such as Aldi and Lidl, taking an increasing market share of available expenditure.

Leisure Spend

3.17 There has been much activity in the commercial leisure sector over the last 25 years. Average household expenditure on leisure services increased substantially between 1984-2005, more than doubling. The pace of development activity nationally began to slow 2005 as some sectors in the commercial leisure market neared saturation point (bingo halls and multiplex cinemas for example). The economic downturn has further compressed spend on leisure activities across the board as consumers sacrifice spend on discretionary activities due to fiscal constraints.

3.18 Eating and drinking out of home has proven the most popular leisure activity that most people undertake on a regular basis. The ‘eating out’ market has grown by 8% over the period 2008-2013, which is impressive considering this growth occurred during the economic downturn. The sector is now worth approximately £32 billion annually.

3.19 Cinema-going is the second most popular leisure activity whereas visiting a theatre, museum or a bowling alley are activities undertaken less frequently. Approximately 40% of adults use a health centre or swimming pool, and only 15% are members of private clubs (figures derived from Mintel). This indicates that there is significant potential for growth in this sector in the future.

3.20 Coffee culture is burgeoning across Britain with the proliferation of coffee shops in high streets in towns of all sizes. The number of high-end independents is growing and chain operators are very active with Caffé Nero, Costa Coffee and Starbucks competing most aggressively for market share. The coffee chain sector has been growing at 6% annually since 2012 and is expected to exceed 6,000 outlets by 2015 with sales reaching £3.2 billion.

3.21 The fast food sector has also proven resilient throughout the downturn, with operators seemingly reorienting themselves towards offering healthy and gourmet products. The restaurant sector has been diverging with some multiple operators such as Frankie & Bennys, Pizza Hut and Nandos pursuing expansion strategies at out-of-centre retail and leisure parks.

3.22 Public houses have come under pressure recently as the competition in the local convenience sector has seen the closure and change-of-use of numerous licenced premises. Pub chains are still active however, seeking prominent urban and suburban sites by main roads.

3.23 During the 1990s multiplex cinema operations expanded rapidly, most notably in the form of 10-16 screen developments in retail parks and out-of-centre locations. This pattern of growth has been curtailed more recently with the current trend being for smaller cinemas with few screens in town centre locations. However the cinema sector has remained buoyant with competition between Cineworld, Vue Cinemas and Odeon driving site acquisition and development as the major operators pursue their respective expansion strategies.

3.24 The health and fitness sector has recently performed reasonably well with budget operators expanding rapidly while some rationalisation has taken place among the higher end operators. The sector is dominated by private clubs such as Virgin Active and David Lloyd Leisure which benefit from the ability to offer a variety of fitness classes and spa facilities. There has also been strong growth in the market for non-contract budget operators such as Pure Gym and The Gym. Chains such as Fitness First and LA Fitness have been pursuing a programme of acquiring smaller sites across small and medium-sized centres, while JJB sports have been developing a combination of gym facilities with large format retail space at out-of-centre locations.

3.25 The bowling sector (ten-pin) has been relatively static recently, there are some strongly performing operators in the market but the pace of expansion has been slow. Mintel records that the popularity of bowling is waning.

3.26 It seems that commercial leisure will play a bigger role in the future as the economy continues to improve, freeing up more discretionary expenditure and as activity in town centres shifts away somewhat from a purely retail-oriented focus. Town centres have the potential to capitalise on this trend by allowing their function to be redefined as destinations in their own right: places for people to meet, interact, stay and recreate rather than just shop and leave. A strong commercial leisure offer can increase dwell times which helps sustain centre vitality beyond traditional retail hours. This in turn will generate significant advantages for existing shops and services that will benefit from linked trips and incidental/pass-by trade as well as the increased vitality and viability of the town centres in general.

Expenditure Forecasts

3.27 Although economic growth will continue to remain relatively muted compared with the last period of expansion, household expenditure is beginning to pick up. Consumer confidence has been boosted by the strong performance of the housing market and a rise in consumer credit is fuelling the buoyancy of household expenditure.

3.28 Against this economic backdrop, the latest Experian Retail Planner Briefing Note (October 2014) raises its expectations regarding its longer term forecasts for annual comparison expenditure growth from 2.9% to 3.3%. Expectations for annual convenience expenditure growth, however, have dipped from 0.8% to 0.6%. The past high rates of growth are unlikely to return any time soon.

3.29 The high street continues to face challenges with a number of factors affecting shopping patterns. Innovations in on-line retailing continue to strengthen its market share of available expenditure. Changing consumer behaviour and preferences have been affected by the development of multi-channelling, technological advancements as well as the convenience and accessibility of out-of-centre retailing, where retailers benefit from larger floorplates, cheaper rents and ample free surface-area car parking.

Retail Outlook

3.30 The recession hit retailers hard, reducing profit margins and undermining the viability of weaker performing operators leading to the failure of numerous high street brands. A combination of an expenditure squeeze and changing shopping habits has reduced operators' space requirements. Vacancy levels increased during the recession with significantly affected centres experiencing vacancy rates of more than 20%. Many town centre development schemes were put on hold or scaled back significantly during the recession. Now that the economy is improving vacancy levels have begun to drop, improving retailer confidence, however major operators are likely to pursue a cautious expansion programme in the short-term.

3.31 Over the last 20 years retailers have been slowly consolidating in a smaller number of larger centres incurring a polarising effect where small and medium-sized centres struggle to attract investment and representation. This pattern has been exacerbated recently as multiple retailers have reduced their floorspace requirements by using a combination of a fewer number of large flag-ship stores supported by an array of smaller satellite shops, coupled with a strong on-line presence that adequately serves customer needs nationally and internationally.

3.32 The cautious outlook of major retailers is increasingly causing them to be selective, this is fuelling the on-going trend of polarisation: strong centres are getting stronger while medium-sized centres are struggling to retain their major multiple retailers. Smaller centres are already geared up to serve the local convenience and day-to-day service needs of smaller catchment areas.

3.33 As usual, low rents and the wide availability of car parking are fuelling the attractiveness of out-of-centre locations for expansion for operators such as Next at Home, John Lewis at Home etc.

3.34 In the context of such challenges to the traditional high street - in the form of the internet, out-of-centre retailing and changing consumer behaviour - it is becoming increasingly important for robust town centre strategies to protect and support town centres and the high street.

3.35 With retail expenditure being increasingly diverted out-of-centre and on-line, the role and function of town centres is set to shift somewhat from being primarily a shopping destination to more of a leisure-centric and community orientated destination. Positively responding to these trends with polices that support adaptability will be the key to successfully driving footfall and vitality in the nation's town centres.

4 QUALITATIVE ASSESSMENT – CANTERBURY CITY CENTRE

4.1 This section explores the vitality and viability of Canterbury city centre against a range of key performance indicators in order to ascertain how healthily the centre is currently performing and to identify pertinent opportunities for - and threats to - improving or sustaining the health of the centre.

4.2 Canterbury is an historic city of regional and national significance, with an international reputation for its heritage, cultural and tourism strengths. It is a 'cathedral city' and a UNESCO World Heritage Site, considered on a par with cities such as Bath, Chester and York. Canterbury's economy is heavily geared towards the tourism sector and the city combines an impressive heritage draw with strong commercial offer. Kent also benefits from a large student population due to the the proximity of the University of Kent, Canterbury Christ Church University and the University College for the Creative Arts.

4.3 Canterbury has a high per capita GDP and is one of the wealthiest towns in the South East. Although geographically small compared with other regional centres across the UK, Canterbury city centre is the dominant (along with Maidstone) comparison shopping destination in Kent.

Retail Composition - Diversity of Uses

4.4 The most recent Experian Goad town centre survey (carried out in November 2014) estimated the city's gross retail floorspace provision at 101,019 sqm. Although Goad's area of focus is not conterminous with the Council's defined town centre, it does cover the main shopping areas and provides a useful barometer of retail diversity and provision generally. Analysis of the breakdown of this floorspace by category shows that the centre is heavily geared towards comparison shopping and retail leisure uses.

Table 1: Retail composition by unit count

	Units	%	UK Avg	Index
Comparison	196	42.5%	32.4%	1.31
Convenience	25	5.4%	8.5 %	0.64
Retail Service	43	9.3%	14.2%	0.66
Leisure Service	125	27.1%	22.5%	1.21
Financial Service	38	8.2%	10.8%	0.76
Vacant	34	7.4%	11.4%	0.65
Total	461	100%		

Table 2: Retail composition by floorspace

	sqm	%	UK Avg	Index
Comparison	51,337	50.8%	36.1%	1.41
Convenience	7,088	7.0%	15.1%	0.47
Retail Service	4,246	4.2%	7.4%	0.57
Leisure Service	26,987	26.7%	23.3%	1.15
Financial Service	6,066	6.0%	8.2%	0.73
Vacant	5,295	5.2%	9.2%	0.57
Total	101,019	100%		

Comparison Retailing

4.5 Canterbury has a wide variety of comparison shopping facilities. The tables above show that there is 51,337 sqm (gross) of comparison shopping floorspace comprising 196 retail units. The proportion of comparison units (at 42.5%) is considerably higher than the UK average of just 32.4%. Indeed, over half of all floorspace in the city centre is given over to comparison shopping. This reveals a good level of consumer choice and shows that the city functions as a key comparison shopping destination.

4.6 59% of all comparison units are ‘multiple retailers’, including such operators as Boots, Waterstones, WH Smith, Wilkinson, Burton, Dorothy Perkins, H&M, New Look, Next, Primark and River Island amongst others.

4.7 The retail core is located on north-western side of Bridge Street where high quality and major high street brands are well-represented in the primary shopping area particularly in St George’s Street and the Whitefriars retail complex which benefits from larger floorplates and a modern yet sensitively integrated shopping environment. Whitefriars opened in 2004 and serves as the focus of quality comparison shopping in Canterbury.

4.8 Department stores Fenwicks, Debenhams, M&S and Nasons have representation providing much choice and competition. There is also a good provision of independent retailers throughout the centre, particularly at peripheral location.

4.9 Canterbury also benefits from a good diversity of comparison shopping with art dealers, numerous book sellers, luxury car show rooms, toys-games & hobbies stores, florists, jewellery stores and a wide range of clothing, footwear and fashion shops. The breadth of national multiple retailers and local independents means that Canterbury caters to a broad spectrum of shoppers. There is clearly a good degree of diversity in the comparison sector and this range spans different market segments.

Convenience Retail

4.10 Although the proportion of convenience floorspace and units numbers are both below the UK average, the centre's convenience provision is served by eight bakers/confectioners, five grocers/delicatessens, two convenience stores and two supermarkets, including a Waitrose foodstore at the south-eastern end of St George's Place. According to Goad there are no standalone fishmongers, butchers or off-licences in the city centre.

4.11 Out-of-centre, yet within walking distance of the town centre, there is a Sainsbury's supermarket at Kingsmead Road (3,173 sqm gross) to the north-east of Canterbury. Further out to the north-east there is a large Asda store (5,612 sqm gross) on Sturry Road. To the south west of the city centre there is a full offer Morrisons on Perch Road (3,252 sqm gross).

4.12 The Goods Shed has a convenience function and stocks high quality produce. It is located adjacent to the railway station and is within easy walking distance of the focus of retailing. There is also an Aldi at St Andrews Close and a Lidl at Sturry Road. Overall, the city centre and the wider urban area of Canterbury is well served by a range of supermarkets and foodstores, catering to all market segments.

Service Provision

4.13 The provision of retail service units in Canterbury (43 units) makes up a low proportion (9.3%) of the overall unit count, when compared with the national average (14.2%). The diversity of 'retail service' offer is quite limited with 27 health and beauty units, eight opticians and six travel agents.

4.14 Leisure service, by contrast, is very well represented with 125 units making up 27.1% of the overall unit count which is a higher proportion than the national average (22.5%). Canterbury has 33 cafes, 31 restaurants, 18 takeaways, 16 public houses and ten bars/wine bars. There are also cinema facilities and a reasonable selection of hotels/guesthouses in the city centre as well as some sports/leisure facilities.

4.15 Financial services are well represented with 38 units making up a proportion that is broadly in line with the national average.

Vacancies

4.16 Vacancies are quite low with only 34 units making up 7.4% of the total unit count. This is below the national average (11.4%), and indicates strong investor confidence and good levels of viability.

4.17 Canterbury has a comprehensive and diverse retail offer. The city's focus on the comparison and leisure-service provision underlines its role as a regional shopping hub and a tourist destination.

Retail Provision / Gap Analysis

4.18 Despite the wider tenant mix noted above, Canterbury is much smaller than comparable 'cathedral' cities. At first glance it is immediately apparent that the following major operators have no representation in the city centre. Although Argos is represented at both Wincheap and Sturry Road (Marshwood Close) and TK Maxx has a store on Sturry Road (Stour Retail Park).

- BHS
- House of Fraser
- John Lewis
- Argos
- TK Maxx

4.19 In order to attain a deeper level of analysis we have compared Canterbury against the similarly profiled 'cathedral' cities of Bath and York. While Canterbury has a diverse range of comparison operators, our gap analysis has uncovered an extensive list of multiple retailers that are present in both Bath and York city centres but have no representation in Canterbury city centre. It is not clear whether these retailers would have any requirement to locate premises in Canterbury, however this list provides an indication of the type of operators that might seek to take up floorspace (for which capacity has been identified) and which Canterbury might hope to attract at some point in the future.[1]

Table 3: Retailers present in Bath and York but not in Canterbury

Coast	Pia
Currys and PC World	Pylones
East	Reiss
Gap	Schuh
Hidden Hearing	Superdry
Hotter	TK Maxx
Jack Wolfskin	TM Lewin
Jo Malone	The North Face
Joules	The Perfume Shop
Joy	The White Company
Kiehl's	Timberland
LK Bennett	Tinc
Long Tall Sally	Topman
Millets	Urban Outfitters
Moda In Pelle	White stuff
Molton Brown	Whitewall Galleries
Oasis	Whistles

[1] These lists have been compiled from the most recent Goad town centre reports and it is possible that the operator mix has altered in the interim.

4.20 In addition to this list, we have compiled a further list of multiple retailers who are present in either Bath or York but not in Canterbury (this list is not exhaustive). There is a good possibility that many of these retailers could be attracted to Canterbury in the future.

Table 4: Retailers present in Bath or York but not in Canterbury

Present in Bath	Present in York
Accessorize	Levi's Store
Alessi	Links of London
AllSaints	Mango
Apple	Miss Selfridge
Austin Reed	Molly Browns
Banana Republic	Monsoon Children
Fired Earth	Mooch
Gapkids	Mulberry
Gieves & Hawkes	Noa Noa
Halfords	O2
Hollister Co	Office
India Jane	Oxfam
Jesspos	Pia
Kurt Geiger	Poundworld
Maplin	Richer Sounds
Moss	Shoe Zone
Russell & Bromley	Sweater Shop
Scribbler	The Disney Store
Sony Centre	Trespass
Space NK Apothecary	Wallis
Sweaty Betty	Warehouse
Ted Baker	Zara
The Kooples	Zest
Toast	
Tommy Hilfigger	
Vans	
Wickes	
Zicci	

Potential development opportunities

4.21 The Whitefriars scheme was the last significant development in the city centre. It has been successfully integrated into the historic core of the city and has become the focus of comparison retailing in the centre. This development offers a high quality shopping environment and larger retail units befitting the requirements of major multiple retailers. Older parts of Canterbury have more traditionally configured units with smaller floorspace and accommodate an attractive array of small and independent operators alongside many high street retailers.

4.22 The Whitefriars development has transformed Canterbury's retail offer and helped secure the centre's position in the retail hierarchy. Should the Council wish to retain this position in the future further town centre development should be considered to help absorb identified floorspace capacity.

4.23 A number of potential development sites were considered in the 2011 Retail Study. The 'bus station site' was the only site identified as having the potential to serve as an extension to the retail core, and would be suitable for an extension of Whitefriars. The bus station site lies immediately adjacent to the Whitefriars and has the potential to enable a seamless integration with the primary shopping area. However the use of the bus station and its proximity to the retail core is vital to Canterbury's connectivity and health. The use of the bus station brings much footfall into the town centre, benefitting its attractiveness to shoppers and helping to underpin the viability of city's stores and services. Therefore the suitability of this potential development site would be wholly contingent on the ability to relocate the bus station to an equally suitable and convenient location without impacting on the accessibility of the city centre or the trip-times of commuters.

Pedestrian Flows and Accessibility

4.24 Canterbury city centre was very busy at the time of our site visits, with pedestrian activity concentrated on St George's Street and Whitefriars. The bus station is well located directly adjacent to Whitefriars and is a good generator of footfall and activity.

4.25 The city is located approximately 55 miles south east of London, and is served by the A2/M2 route which provides direct access to London and connects Canterbury to Dover to the south-east.

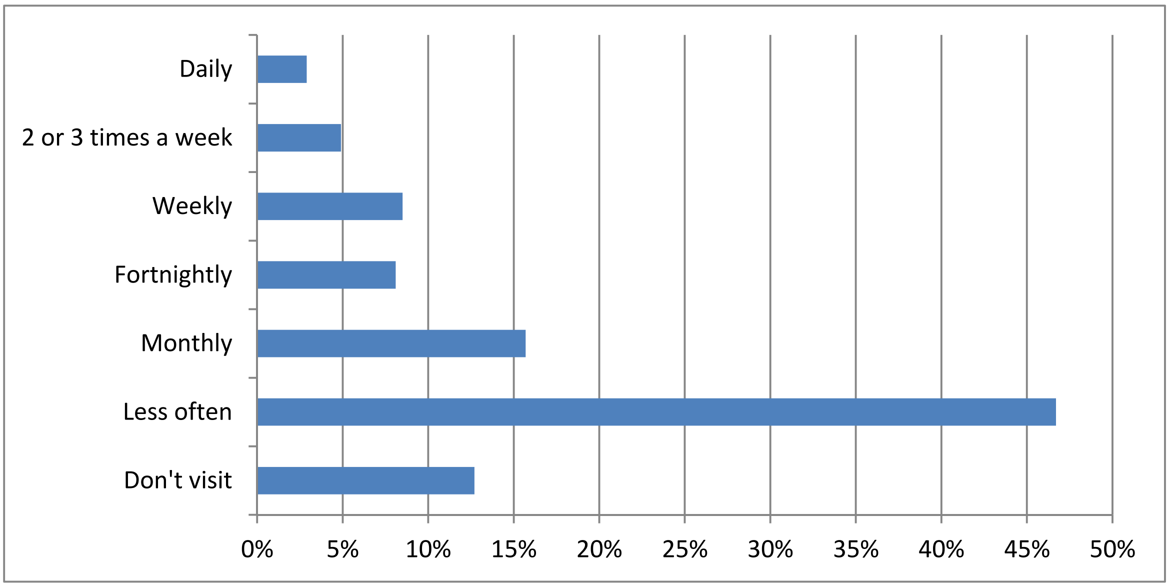
4.26 The city is well served by public transport with numerous bus routes terminating at Canterbury, and two railway stations (Canterbury West and Canterbury East). A high speed rail link connects Canterbury to London with a journey time of approximately 1hr 45 mins.

4.27 The retail core seems adequately served with public car parking facilities, and there are three park and ride car parks operating with frequent connecting bus services.

Visitor Views and Perceptions

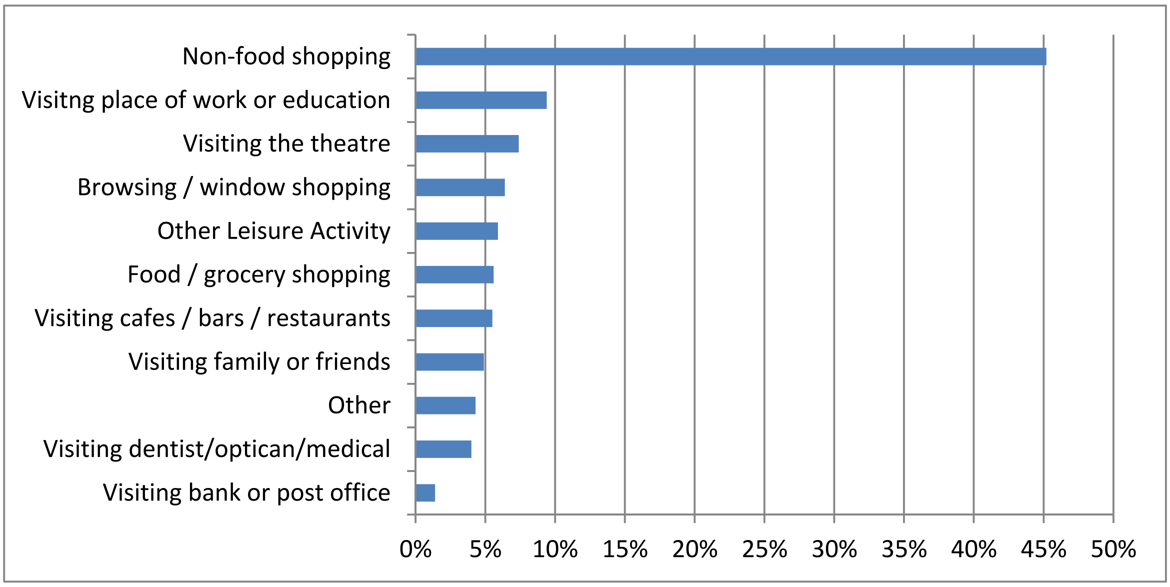
4.28 The household telephone survey drew responses from 1,400 people across Kent. People were asked how often they visited Canterbury city centre. Only 2.9% of people claim to visit daily. 16.3% visit once a week or more frequently, while 40% visit once a month or more often. Almost half of all respondents (46.7%) visiting Canterbury less often than once a month, and 12.7% do not visit Canterbury at all.

Fig 1: Frequency of Visiting Canterbury



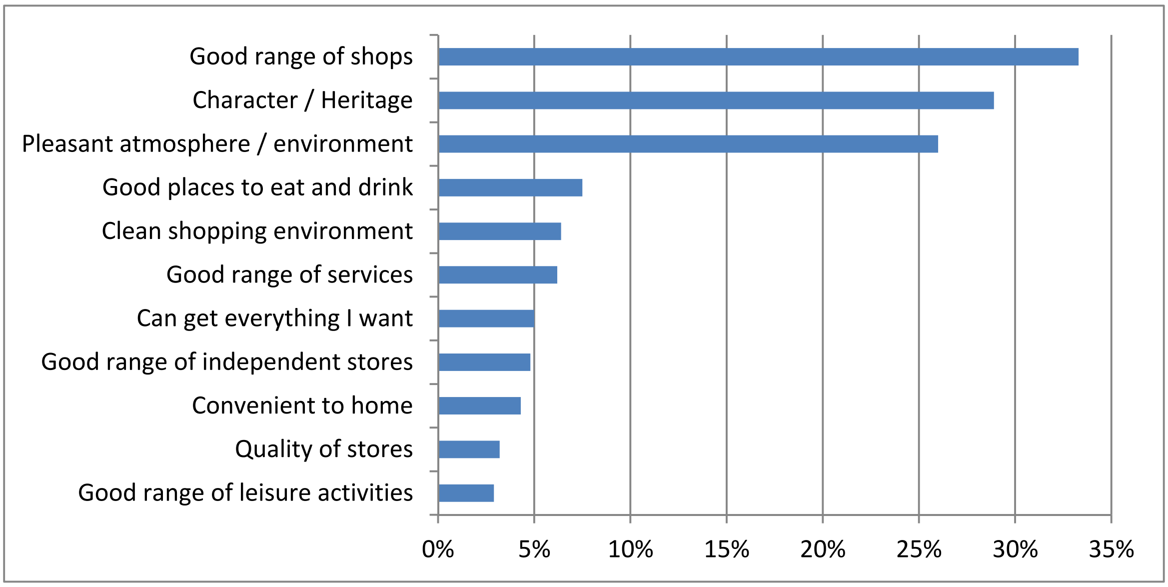
4.29 The survey reveals that the most popular reason for visiting Canterbury is non-food shopping (45% of respondents who visit Canterbury). The second most popular reason is 'visiting a place of work or education' (9%). Food shopping came in low at 6%. The graph below is a visual representation of the importance of Canterbury's non-food offer to the vitality and attractiveness of the centre.

Fig 2: Reasons for Visiting Canterbury



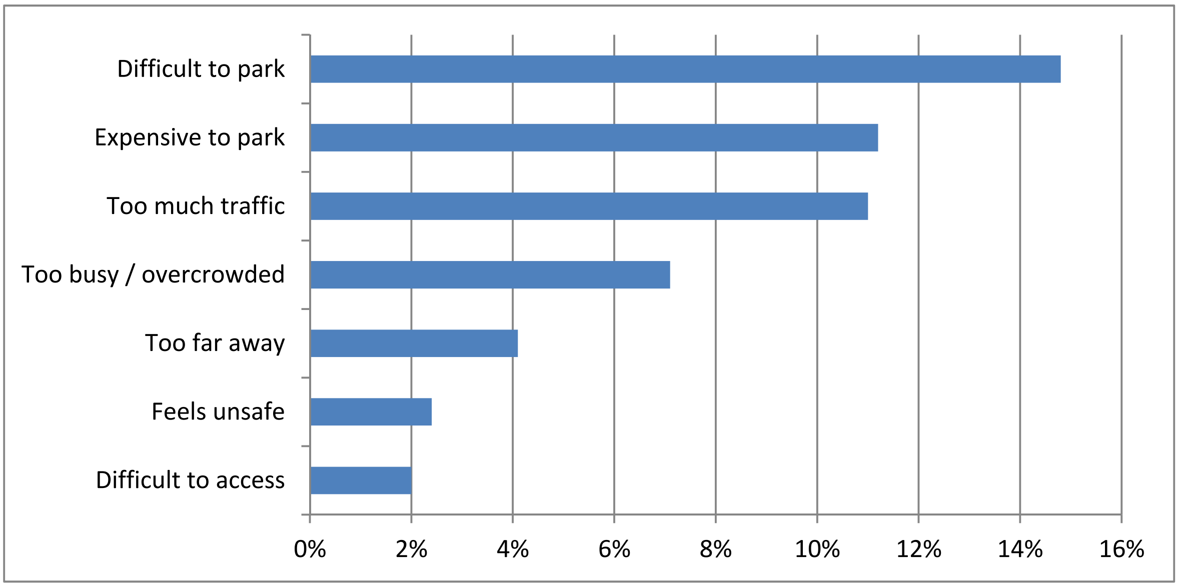
4.30 Those respondents who visit Canterbury were asked what they liked about the city. The graph below lists the main individual responses, and it is clear that character/heritage/environmental quality is a major strength of the city centre; so too is the range of shops and services.

Fig 3: What people like about Canterbury



4.31 When people were asked what they disliked about Canterbury an encouraging 47% said there was nothing that they disliked. Where negative aspects were mentioned they mostly related to parking, traffic and overcrowding, as revealed by the graph below.

Fig 4: What people dislike about Canterbury



5 RETAIL MODELLING METHODOLOGY

5.1 This section sets out a full assessment of retail capacity forecasts for convenience and comparison goods floorspace across the district. The robustness of any retail model relies on the suitability of parameters, the accuracy of its data inputs and the feasibility of the assumptions used. This section describes the preparation of the capacity study, and sets out the range of data inputs used to build up the model and explain any assumptions that have been used.

Survey Area

5.2 The same survey area as the previous DTZ retail study has been used in order to allow a direct comparison of survey results; this will make it easier to track the change over time in market shares and trade-draw patterns for specific retail destinations.

5.3 14 survey zones have been built up from ward boundaries, and have been drawn to represent capture shopping patterns across Kent. Zones 1 2, 3 and 4 represent the likely core catchment of Canterbury city centre, although the survey results show that Canterbury exerts significant influence much further afield. Zones 1-6 broadly reflect the extent of the administrative boundary of Canterbury City Council. A map of the survey area is included at Appendix A to this report.

Household Telephone Survey

5.4 NEMS Market Research was commissioned to undertake a household telephone survey to gather information from 1,400 respondents. The survey was carried out between April and May 2015, and the results provide up-to-date information on the patterns of expenditure in the area as well as market share data for individual retail destinations.

Expenditure

5.5 The expenditure data we have used in our model is derived from Experian Micromarketer which provides information on average convenience and comparison expenditure per head by zone. The base year for the retail model is 2015. Annual expenditure growth rates were then applied to these figures (derived from Experian's Retail Planner 12 Briefing Note) to produce expenditure per capita figures for 2015 (when the survey was undertaken) and the various assessment years (2020, 2025 and 2031).

5.6 All prices are set to a 2013 price base, being the year for which the latest expenditure per capita figures from Experian are available. These per capita expenditure figures were then applied, per zone, to the population projections to produce the total amount of available convenience and comparison expenditure in 2015 and future assessment years.

5.7 With respect to convenience expenditure, an assumption of a 70:30% split has been adopted for main food and top-up shopping. This has been revised since the 2011 retail study (when an 75:25% split was used) to reflect retail trends and changing shopping behaviour whereby more people are undertaking a greater number of smaller shopping trips thereby increasing the proportion of top-up shopping expenditure.

Special Forms of Trading (SFT)

5.8 No assumptions have been made about SFT instead this study relies on the results of the telephone survey to inform the market shares for street markets, internet shopping (both 'click & collect' and home delivery, and other special forms of trading. This allows to us apportion spend in line with actual responses and the local pattern of expenditure rather than applying broad-brush assumptions drawn from assumptions about national trends.

Existing Turnover and Inflow Assumptions

5.9 Applying available expenditure data to the results of the household telephone survey enables the calculation of turnover levels for existing retail destinations from the survey area. This study allows for a degree of inflow: a rate of 5% has been carried over the 2011 DTZ Retail Study and applied to retail destinations in and on the edge of Canterbury city centre.

Market Shares and Turnover

5.10 Survey responses directly inform the market share calculations. For comparison shopping people were asked where they undertake various subcategories of comparison shopping and their responses were weighted by the proportion of total comparison spend each subcategory represent, in order to produce total composite comparison market shares for each destination (Table 4, Appendix E).

5.11 Market share results for convenience and comparison spend can be converted into turnover figures at 2015 and future years by applying these market shares to the pools of available expenditure identified in each zone at any given year.

5.12 Given the difficulty in obtaining company average sales densities for all comparison stores in any given area (due to the number of separate businesses involved and wide divergence in the performance of individual operators), we assumed an equilibrium position at the base year (2015 in this case). This is a standard feature of quantitative comparison capacity modelling to unless the retail provision is clearly overtrading.

5.13 We have applied annual efficiency rates to benchmark sales densities, derived from Experian's latest briefing note.

Retail Capacity Modelling

5.14 When the future anticipated turnover of a store or town centre is compared (on the basis of constant market shares) with the expected benchmark turnover, the level of headroom that should be available to support new retail floorspace can be established. The study then factors in the volume of expenditure that is likely to be absorbed by the quantum of committed floorspace to derive the volume of residual expenditure available to support new floorspace. This figure is divided by a benchmark sales density to derive a floorspace capacity figure in a given year. Quantitative capacity is assessed for new development across the district as a whole.

6 CURRENT EXPENDITURE PATTERNS

6.1 This section sets out some of the key findings from the household telephone survey. The results provide empirical evidence defining the pattern of expenditure in the survey area. By analysing market-share and trade-draw information it is possible to chart the influence that existing retailers and destinations have in each zone, and reveal from where they draw the bulk of their trade.

Convenience Market Share, Turnover and Trade Draw

Canterbury In & Edge-of-Centre

6.2 The in-centre convenience provision in Canterbury city centre comprises the M&S store on St George's Street, the Tesco Metro at Whitefriars and a selection of small local shops. When the results of the household telephone survey are examined it seems clear that these stores perform reasonably well with a sales density of £5,322/sqm. The M&S store is the most popular destination in the retail core with a convenience turnover of £10.5 million. The city centre's convenience provision serves an important and pre-dominantly top-up shopping function.

6.3 The Waitrose store at St George's Place and the Sainsbury's store at St Dunstan's Place are edge-of-centre and serve the city centre well. Waitrose is conveniently located within easy walking distance of the city core and judging from pedestrian flows and activity it is clear that this foodstore acts as an important anchor underpinning centre health and viability. With £22.6 million the Waitrose store turns over more than twice that of M&S. These in-centre and edge-of-centre stores draw most of their trade from Zone 1 signifying a reasonably localised catchment.

Canterbury Out-of-Centre

6.4 Canterbury's out-of-centre convenience provision generally has a wider catchment area than the in-centre stores, particularly the larger supermarkets, including the Asda at Sturry Road, the Morrisons at Perch Road and the Sainsbury's at Kingsmead Road. Morrisons appears to be the most popular supermarket in the urban area and with a convenience turnover of £55.9 million - which is higher than the overall turnover of the entire convenience provision in Canterbury (in and edge-of-centre) - this supermarket is trading very strongly.

6.5 The Asda store also has a high turnover (£42.5 million) but with a large sales area this store is trading in line with company averages. The Sainsbury's store has a lower turnover (£34.6 million) but with a much smaller floorplate this store is trading strongly at £17,020/sqm, in excess of company benchmarks.

6.6 Although it doesn't have the highest turnover, at £22.2 million the Aldi at St Andrews Close has a very high sales density due to the small size of the floorplate, meaning that the Aldi is the best performing store - trading at a sales density of £31,051 per sqm. These out-of-centre stores serve a main food shopping function and there is some quantitative evidence that Aldi and Morrisons stores may be overtrading, however this is counteracted by the fact that other stores, particularly those in-centre and some out-of-centre are trading below company averages. There is also a good level of choice and competition in the convenience market. On balance there is sufficient convenience floorspace at present to meet the current needs of the population.

Canterbury Urban Area as a Whole

6.7 When looking at Canterbury's urban area as a whole (the combined in-centre, edge-of-centre and out-of-centre convenience provision) the total convenience provision has a combined turnover of £212.7 million. Tables 3 and 4 below clearly show that the centrally located stores draw trade locally while the out-of-centre stores draw from much further afield. In fact the out-of-centre stores draw from far beyond Zones 1-6 as is evident from Tables 4, 5 and 6 at Appendix D.

6.8 Of all available convenience expenditure in Canterbury City Council (Zones 1-6) the stores in the Canterbury urban area enjoy a 53% market share. The borough as a whole has a convenience retention rate of 91% of expenditure from Zones 1-6 which is a very high level of trade-retention especially considering the fact that internet shopping has a 4.8% market share across the district. This leaves a leakage level of only 5% to destinations beyond the administrative boundary.

Table 5: Canterbury convenience provision - market shares (Zones 1-6)

	Z1	Z2	Z3	Z4	Z5	Z6	Total
In-Centre	16.2%	6.8%	5.3%	5.2%	0.0%	1.3%	6.4%
Edge-of-Centre	13.3%	4.3%	14.1%	8.6%	0.9%	2.6%	6.6%
Out-of-Centre	62.5%	67.2%	54.3%	64.3%	17.5%	14.6%	40.4%
Combined Urban Area	92.0%	78.2%	73.7%	78.1%	18.4%	18.5%	53.3%

Table 6: Caterbury convenience provision – Turnover (£Ms) (Zones 1-6)

	Z1	Z2	Z3	Z4	Z5	Z6	Total
In-Centre	£14.5	£2.3	£1.1	£1.0	£0.0	£1.0	£19.8
Edge-of-Centre	£11.9	£1.4	£2.9	£1.6	£0.7	£1.9	£20.4
Out-of-Centre	£56.2	£22.3	£11.0	£12.4	£13.6	£10.4	£125.9
Combined Urban Area	£82.7	£26.0	£15.0	£15.0	£14.3	£13.2	£166.2

Herne Bay

6.9 Herne Bay's convenience provision consists of a Morrisons, a Co-op and a selection of local shops in-centre, and two Co-ops out-of-centre. This provision has a good market share in Zone 5 but little penetration beyond this zone. The majority of this market share is captured by the Morrisons store with a turnover of £26.4 million and a strong sales density. All convenience floorspace in Herne Bay has a tightly drawn catchment.

6.10 On balance sales densities are just below benchmarks. There is not a wide variety of choice in the convenience market in Herne Bay but we understand that permission has been granted for a Sainsbury's store at the Altira business park, and an Aldi store at Kings Road, both of which will help improve consumer choice and competition in this sector.

Whitstable

6.11 Analysis of trade draw patterns (see table 6 of Appendix D) reveals that retail destinations serving Whitstable draw most of their convenience trade from Zone 6 but also from Zone 5 (Herne Bay's natural catchment).

6.12 The convenience provision in Whitstable is more diverse than Herne Bay's with Co-op, Sainsbury's, Tesco and Iceland all represented in-centre. The large Tesco Extra at Millstrood Road and the Sainsbury's at Reeves way (both out-of-centre) have similar turnovers of just over £32 million each. Although the Sainsbury's is smaller and as such benefits from a higher sales density.

6.13 See the maps at Appendix B for the spatial distribution of the key foodstores across the survey area, as revealed by the results of the telephone survey. And see table 7 of Appendix D for a full breakdown of the existing performance of convenience destinations across the district.

Comparison Market Share, Turnover and Trade-Draw

Canterbury

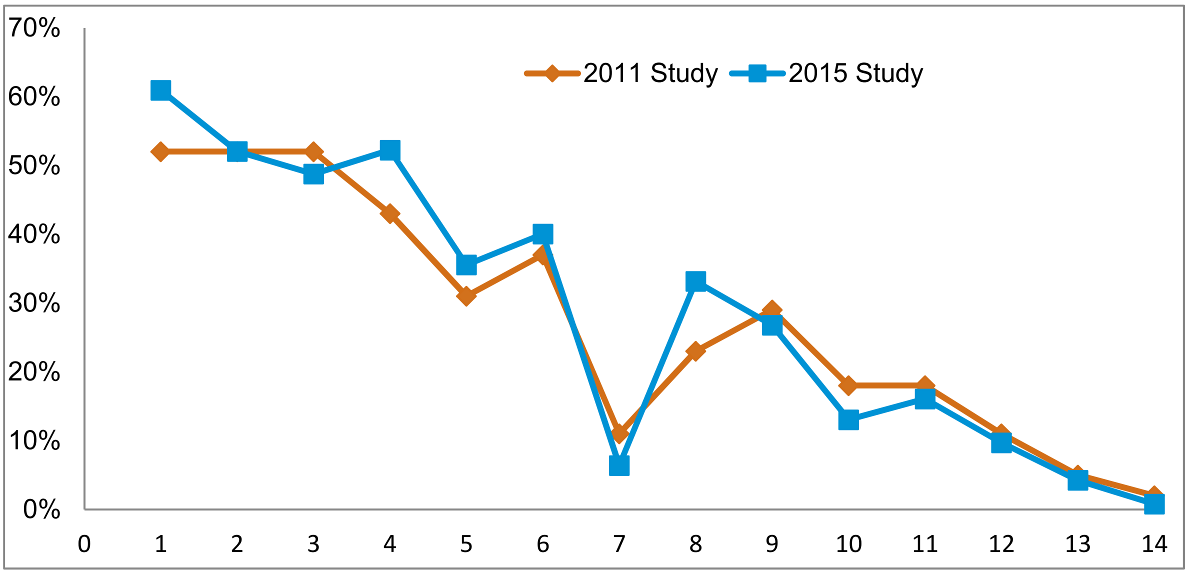
6.14 With respect to comparison shopping patterns, it is clear from Table 5 of Annex E that Canterbury city centre has a very wide catchment area and exerts significant influence across the survey area far beyond the City Council boundary (with the exception of Zone 13). Canterbury city centre is particularly popular for clothing and footwear, jewellery, personal goods, household textiles, soft furnishings and glassware.

6.15 Table 5 (Appendix E) reveals that Canterbury city centre has a comparison turnover of £557.3 million from the survey area in 2015 which amounts to a 13.8% market share from all available comparison expenditure in Kent. However, Canterbury city centre has a 48% market share from Zones 1-6 (the City Council area), almost half of all spend available in the area.

6.16 We have compared the city centre's market share of comparison spend with the results of the 2011 retail study. The pattern is broadly consistent, as is clear from the graph below, however there evidence that the catchment is contracting slightly. While the dominance of the city centre seems to have increased slightly in the city council area, Canterbury is slightly less popular further afield, indicating that very slight diminution in Canterbury's regional performance.

6.17 Standing still is akin to decline, and it is likely that the unmet capacity identified in the last study has had the double effect of pushing up the sales densities of existing floorspace and also reducing market share at the periphery.

Fig 1: Canterbury city centre comparison market share peformance over time



6.18 The retail parks serving Canterbury perform an important function, and the combined retail warehousing on Sturry Road (Stour, Maybrook and Canterbury retail parks) have an overall turnover of £98.4 million, amounting to a 13.5% market share from Zones 1-6 (or 2.4% from the survey area as a whole). On average retail floorspace in the retail parks on Sturry Road trade at a sales density of £5,017/sqm. This retail warehousing provision caters mostly to the furniture, floor coverings and domestic appliances goods sectors, as well as sporting goods. Sturry Road retailers draw most of their trade from Zones 1, 2, 5, 6 and 11.

6.19 The combined retail warehousing at Wincheap (Riverside and Wincheap retail parks, as well as a number of standalone units) is less popular than Sturry Road provision and has a much lower turnover, at £41.9 million. Wincheap's penetration rate is weaker and has a more tightly drawn catchment. Most of its trade originates in Zones 1 and 11. Retailers in Wincheap currently trade on average at a sales density at £2,240/sqm (see Table 15 of Appendix E for a full breakdown of the existing quantitative trading performance of these comparison shopping destinations).

Table 7: Canterbury urban area comparison provision – market shares (Zones 1-6)

	Z1	Z2	Z3	Z4	Z5	Z6	Total
Canterbury City Centre	60.9%	52.1%	48.8%	52.2%	35.6%	40.0%	47.7%
Sturry Road RW	12.5%	19.0%	13.0%	19.0%	13.1%	11.2%	13.5%
Wincheap RW	7.6%	8.3%	4.6%	4.7%	0.5%	0.6%	3.9%
Combined Urban Area	81.0%	79.4%	66.4%	75.9%	49.2%	51.8%	65.1%

Table 8: Canterbury urban area comparison provision – turnover (£Ms) (Zones 1-6)

	Z1	Z2	Z3	Z4	Z5	Z6	Inflow	Total
Canterbury City Centre	£93.7	£29.6	£18.8	£16.9	£45.5	£48.6	£332.1	£585.2
Sturry Road RW	£19.2	£10.8	£5.0	£6.1	£16.7	£13.6	£26.8	£98.4
Wincheap RW	£11.6	£4.7	£1.8	£1.5	£0.6	£0.7	£20.9	£41.9
Combined Urban Area	£124.5	£45.1	£25.6	£24.5	£62.8	£62.9	£379.8	£725.2

6.20 Herne Bay and Whitstable have much lower comparison turnover levels reflecting their position in the retail hierarchy. Herne Bay has a comparison turnover of £18.7 million drawing mostly from Zone 5. Whitstable has a wider appeal with a £50.6 million turnover and strong trade-draw from Zones 6, 11 and 5.

Comparison Trade Retention and Leakage

6.21 While Canterbury city centre and the out-of-centre retail provision draw much comparison trade from beyond the Council area (Zones 1-6), very little of the expenditure within Zones 1-6 leaks out to destinations beyond the administrative boundary. The table below shows that 13.6% of comparison expenditure in Zones 1-6 is transacted on-line. Only 10.6% of available expenditure leaks out to destinations beyond the City Council area. This amounts to total trade retention of 75% which is a strong performance and reflective of the regional dominance of Canterbury city centre.

6.22 That said, it is worth noting that the combined retail park provision at Westwood/Broadstairs (Westwood Shopping Centre/Westwood Gateway/East Kent Retail Park/Broadstairs Retail Park), which is located 35 miles from Canterbury city centre, attracts £31.1 million from the city council area (Zones 1-6). Similarly, Bluewater in Greenhithe (42 miles from Canterbury) attracts £6.6 million from the City Council area. See the Map at Appendix C for the spatial distribution of key comparison retail destinations highlighted by the results of the telephone survey.

Table 9: Trade retention and leakage

Destination	Market Share Zones 1-6
Canterbury City Centre	47.7%
Sturry Road (Out-of-Centre)	13.5%
Wincheap (out-of-Centre)	3.9%
Herne Bay	3.5%
Whitstable	7.2%
Internet (SFT)	13.6%
Other (Leakage)	10.6%

Internet Spend

6.23 18.3% of all comparison expenditure available in the survey area (Zones 1-14) is spent on-line; this amounted to £739.5 million in 2015, meaning that the vast bulk of this SFT expenditure leaves the survey area, and supports the turnover and balance sheets of businesses at remote locations or possibly even abroad.

6.24 The results of our telephone survey reveal higher SFT expenditure rates than are being reported nationally, higher even than the levels Experian predict will be reached by 2020 (forecast at 15.5%).

6.25 The full account of 'on-line' spend – in the survey area - by sub-category is set out in Table 8 of Appendix E. This table shows that Internet spend/SFT is attaining higher market shares in specific sub-categories of comparison shopping, most notably books, CDs and DVDs (with a 56.6% market share from Zones 1-14); as well as sporting goods, bicycles, toys, games and camping equipment (23.9% market share). SFT's market share of furniture, floor coverings and large household appliances was also very high at 23%.

6.26 Interestingly internet-spend across the survey area has an equal market share in the following sub-categories: 'clothing and footwear', 'household textiles' and 'jewellery, silverware and watches' - all at approximately 11%.

6.27 Very few people seem to be shopping on-line for 'DIY & hardware goods', or for 'chemist goods, cosmetics & beauty products', with market shares of only 2.3% and 1.8% respectively.

6.28 Table 8 Appendix E shows that the market penetration of internet-spend differs widely by zone, ranging from as low as 12.3% in Zone 6 to as high as 27.5% in Zone 13.

Leisure Participation Patterns

6.29 The household telephone survey asked people about a range of leisure activities. The most popular such activity proved to be 'eating out' with 81% of all respondents claiming to visit restaurants, compared with 50% who visit pubs, bars, nightclubs or social clubs. Cinema going is the next most popular commercial leisure activity with 66% of respondents participating.

6.30 Canterbury city centre is the second most popular destination in the survey area for eating out (13% market share) second only to Maidstone (16%). Canterbury is by far the most popular for restaurants amongst the population in Zones 1-6 (the city council area).

6.31 Herne Bay is the most popular restaurant destination for people Zone 5, while Whitstable is the most popular most popular for people in Zone 6 – this demonstrates a high degree of customer loyalty in these respective towns with participating residents preferring to eat out locally.

6.32 The pattern for visiting public houses is quite similar with Maidstone proving the most popular location. Canterbury is one of the top destinations for public houses and bars, and is especially popular with residents in Zones 1 and 11.

6.33 With regards to cinemas, Canterbury is home to the Curzon Westgate, The Gulbenkian Cinema and an Odeon. However together these facilities in Canterbury secure only a combined 39% market share from the Canterbury City Council area (Zones 1-6). The most popular destinations in the survey area for cinema-going are the Cineworld at Ashford, the Odeon at Maidstone and the Vue Cinema at the Westwood Cross shopping centre. The Kavanagh cinema is Herne Bay is very popular with people from the local area (Zone 5).

6.34 Ten-pin bowling is reasonably popular in the survey area with 30% of people participating in this leisure activity. There is no ten-pin bowling available in Canterbury city centre – people from the city council area (Zones 1-6) visit either the MFA Bowl at the Pentagon shopping centre in Whitstable, or travel out to the AMF bowling alley in Ashford.

6.35 Bingo is not very popular in the survey area with only 9% of respondents participating in this activity. The Mecca Bingo at Broadstairs and the Gala Bingo at Maidstone are the most visited facilities.

6.36 53% of people claim to visit the theatre or concert halls. Canterbury city centre's concert hall facilities are very popular right across the survey area, as popular overall as central London.

6.37 In summary Canterbury city centre's leisure offer is mixed. The restaurant and café offer is very well represented with a good choice of high end and mid-market operators. There is also a good range of independent pubs and bars that contribute significantly to Canterbury's evening economy. However, there appear to be some gaps in Canterbury's leisure offer. With regard to cinemas and bowling, Canterbury's offer is quite limited. There is also a lack of choice in the health and fitness sector, with very few people in the Council area claiming to use indoor sports facilities. Maidstone and Ashford are proving to be more popular destinations for such activity.

Summary

6.38 Convenience floorspace within the Canterbury City Council area retains almost all of its available expenditure in the core catchment, although the strongest performers are out-of-centre stores. The in-centre foodstore provision is trading below benchmarks primarily due to the mainly top-up shopping role that these stores perform, and analysis of the patterns of expenditure reveals that the population in the catchment prefer out/edge-of-centres stores for their main food shopping. Budget/value operators appear to be trading very well, and small independent operators are performing strongly in Canterbury city centre.

6.39 With respect to comparison shopping, Canterbury city centre and Maidstone are the dominant shopping destinations in Kent. Canterbury has low vacancies and a large range and variety of retailers serving a wide spectrum of shoppers. However, the centre faces strong competition from Maidstone, and less so from Ashford. Despite the influence of these competing centres, Canterbury city centre has a very wide catchment drawing expenditure from across the extensive survey area. It attracts almost half of all available comparison expenditure in the council area and its retail function is complemented by conveniently located retail warehousing provision at Sturry Road and Wincheap. Together the overall comparison offer attains a 65% market share from Zones 1-6.

6.40 Herne Bay and Whitstable have localised catchments for both comparison and convenience shopping and a much more limited shopping offer, befitting their respective roles in the retail hierarchy.

6.41 For the most part leisure facilities in Canterbury seem to be catering reasonably well to the needs of the resident population although there are gaps in the commercial leisure offer, and evidence that some people are travelling out to other towns and destinations to satisfy their leisure-based requirements such as visiting cinemas, bowling alleys and health & fitness centres.

7 FLOORSPACE CAPACITY

Introduction

7.1 This section sets out the quantitative retail capacity for convenience and comparison floorspace across the City Council area by 2020, 2025 and 2031, in accordance with the methodology set out in Section 4 above. It is advisable that floorspace capacity projections beyond 2025 to be treated with a significant degree of caution due to the increasing propensity for longer range forecasts to be less accurate. We recommend that this capacity exercise be re-run at five year intervals, and that the Council monitor key modelling inputs such as population growth, expenditure growth, new development in competing centres and the vitality and viability of Canterbury City centre, Whitstable and Herne Bay.

7.2 The calculations of existing turnover figures for all retail destinations have been derived from the survey results taking account of estimated population and expenditure levels.

7.3 The borough-wide floorspace capacity forecasts should be treated as a general indication of quantitative need rather than maximum or minimum floorspace targets. It should also be noted that failure to meet identified need or invest in the existing retail provision can lead to loss of market share over time. The capacity floorspace figures below are based on constant market shares as per standard retail modelling methodology; this does not take into account fluctuations in market share that may transpire as new developments come on-line with the potential to affect shopping habits.

Convenience Capacity Modelling

7.4 The projections show that the population in the survey area is expected to grow by 14% between 2015 and 2031 (see Table 1 of Annex D). When a combination of spend per capita and forecast expenditure growth rates is applied to these population figures it is calculated that the total pool of available convenience expenditure in the survey area will grow from £2,355 million in 2015 to £2,950 million by 2031 (an increase of £595 million or 16%).

Table 10: Population and expenditure

	2015	2020	2025	2031
Population	1,135,044	1,189,351	1,241,300	1,292,256
Spend	£2,355m	£2,542m	£2,734m	£2,950m

7.5 The survey results reveal that the 6,634 sqm of net convenience floorspace in Canterbury city centre (in-centre and edge-of-centre combined) has a 2% market share of available convenience expenditure in the survey area and a total turnover £46.4 million in 2015. This amounts to a sales density of £7,369/sqm, which is below the benchmark for large format convenience floorspace. The seemingly low market share level is a function of the extensive survey area covering the whole of Kent.

7.6 Similarly, (when Canterbury's out-of-centre convenience provision is taken into consideration) the combined 17,201 sqm of net convenience floorspace in Canterbury's urban area has an 8.9% market share and a total turnover of £210.2 million.

7.7 On the basis of constant market shares it is anticipated that the turnovers of this floorspace will increase proportionately, in line with the uplift in available expenditure. Table 11 below shows the total turnover of these areas (in-centre, edge and out-of-centre), as well as the provision serving Herne Bay and Whitstable, at future stages (not accounting for inflow).

Table 11: Anticipated future turnovers in Canterbury (constant market shares)

	2020	2025	2031
In-Centre	£25.0m	£26.7m	£28.8m
Edge-of-Centre	£24.7m	£26.3m	£28.4m
Out-of-Centre	£175.0m	£186.5m	£201.2m
Canterbury Urban Area Total	£224.7m	£239.5m	£258.4m
Herne Bay (In & Out-of-Centre)	£40.5m	£43.1m	£46.5m
Whitstable (In & Out-of-Centre)	£88.3	£94.2m	£101.6m

7.8 One can calculate the volume of headroom (i.e. the forecast expenditure available to support new retail floorspace) by comparing these anticipated turnover levels (plus inflow) against the potential turnovers at benchmark sales densities, and accounting for the potential turnover of any commitments.

7.9 The only convenience commitments in Canterbury are proposed Sainsbury's supermarket at the Altira Business Park in Herne Bay and the Aldi store at Kings Road, also in Herne Bay. These commitments will deliver 10,923 sqm of gross retail floorspace, 4,764 sqm of which is likely to be dedicated to convenience retailing. On the basis of company average sales density (and applying convenience floorspace efficiency factors) we estimate that the proposed commitments will result in a convenience turnover of approximately £54 million. This committed turnover needs to be subtracted from the identified headroom to reveal the final amount of residual expenditure that is available to support additional retail floorspace.

7.10 Table 12 below shows that the turnover of commitments will absorb more than the headroom delivered in 2020, with residual expenditure not materialising until 2025 when there will be £13.2 million available to support new convenience floorspace. This figure will grow to £41.2 sqm by 2031.

Table 12: Residual available convenience expenditure and capacity in Canterbury

	2020	2025	2031
Headroom	£30.3m	£56.5m	£84.8m
Turnover of Commitments	£53.2m	£53.4m	£53.7m
Residual Spend	-£23m	£3.2m	£31.2m
Generic Sales Density	£11,857/sqm	£11,880/sqm	£11,952/sqm
Capacity	-	266 sqm	2,608 sqm

7.11 If an assumed sales density of £12,000/sqm (in 2015 and projected forward with efficiency rates) for new convenience floorspace is applied to these residual figures, the forecast expenditure growth will be in a position to support 266 sqm (net) by 2025, growing to 2,608 sqm (net) by 2031.

7.12 Current commitments will absorb all available expenditure in the short term; accordingly there is no quantitative or qualitative need for new convenience floorspace in the short term, and capacity at 2025 will be negligible. Substantive convenience capacity will emerge by 2031 but we would advise caution when interpreting long range forecasts, and recommend that the Council revisit this capacity exercise periodically to ensure robust and up-to-date needs assessment. See Table 12 of Annex D for a detailed account of retail capacity for convenience floorspace.

Comparison Capacity Modelling

7.13 The combination of population and expenditure growth is expected to deliver a £3.68 billion uplift in total available comparison expenditure across the survey area between 2014 and 2024 (92% growth).

Table 13: Population and expenditure

	2015	2020	2025	2031
Population	1,135,044	1,189,351	1,241,466	1,292,300
Spend	£4,031m	£4,970m	£6,103m	£7,720m

7.14 Canterbury city centre's 77,433 sqm of net comparison floorspace has a 13.8% market share of available expenditure in the survey area and a total turnover (accounting for inflow of 5%) of £585.2 million in 2015, meaning that comparison shops in Canterbury are trading at a sales density of £7,557/sqm.

7.15 Comparison floorspace in the Canterbury urban area as a whole (including retail warehousing at Sturry Road and Wincheap) has a combined sales area of 115,734 sqm, with a 17.2% market share, and a total turnover of £725.5 million.

7.16 The city council area as a whole has a 140,726 sqm provision of net comparison floorspace, with a market share of 19% and a total turnover of £794.8 million, which equates to a sales density of £5,648/sqm. As the pool of available expenditure is expected to increase dramatically over the plan period, one could expect the turnover of existing comparison floorspace to increase on the basis of constant market shares, in line with Table 14 below.

Table 14: Anticipated comparison turnover (constant market shares)

	2020	2025	2031
Turnover	£939m	£1,146m	£1,449m
Inflow	£34.1m	£41.6m	£52.5m
Total Turnover	£973m	£1,188m	£1,501m

7.17 To assess the level of headroom potentially available to support new floorspace these anticipated turnover figures (calculated on the basis of constant market shares) are compared against an estimate of the potential turnover of the same floorspace calculated by allowing the existing sales density to grow annually by a floorspace efficiency rate (using an efficiency rates derived from the Experian Retail Planner Briefing Note 12.1 Addendum, October 2014).

7.18 With a total of 2,498 sqm of planned new net comparison retail floorspace, these commitments are set to amass a combined turnover of £20.9 million by 2020, growing to £23.3 million by 2025 and

£26.5 million by 2031. Subtracting the turnover of these commitments from the apparent headroom at assessment years allows us to determine the residual expenditure available to support new retail floorspace. We anticipate that there will be £72.3 million of residual expenditure by 2021, growing to £185.5 million by 2025, and £358.7 by 2031.

Table 15: Residual available comparison expenditure and capacity in Canterbury

	2020	2025	2031
Headroom	£93.3m	£208.8m	£385.2m
Turnover of Commitments	£20.9m	£23.3m	£26.5m
Residual Spend	£72.3m	£185.5m	£358.7m
Existing Sales Density	£8,368/sqm	£9,312/sqm	£10,611/sqm
Capacity	8,645 sqm	19,924 sqm	33,800 sqm

7.19 We have assumed that any new retail floorspace will trade at the existing average Canterbury city centre sales density (£7,557/sqm at 2015), accounting for annual efficiency growth over the plan period. This reveals capacity for 8,564 sqm of net comparison floorspace by 2020, growing to 19,924 sqm by 2025, and 33,800 sqm by 2031.

7.20 A decision as to where this capacity would best be accommodated should take into consideration the aspirations for the growth and development of individual centres in the City Council area, and a judgement as to the importance of protecting each centre's market share of expenditure from the wider area.

8 SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Summary

8.1 Over the last 20 years retailers have been slowly consolidating their representation into a smaller number of large centres. This has incurred a polarising effect where small and medium-sized centres struggle to attract investment. This pattern has been exacerbated recently as multiple retailers have reduced their floorspace requirements by using a combination of a fewer number large flag-ship stores that are supported by an array of smaller satellite shops, coupled with a strong on-line presence that adequately serves customer needs nationally while extending their commercial reach internationally.

8.2 The UK is emerging from a recession and although economic growth is expected to continue to remain relatively muted compared with the last period of expansion, consumer confidence has been boosted by the strong performance of the housing market and the rise in consumer credit that is fuelling the buoyancy of household expenditure.

8.3 Canterbury is a large centre and has managed to retain and attract key retailers, thereby benefitting from the process of polarisation mentioned above. The city centre has a very wide catchment area and exerts significant influence in the survey area, far beyond the City Council boundary (with the exception of Zone 13). The results of the household telephone survey reveal that Canterbury city centre is particularly popular for clothing and footwear, jewellery, personal goods, household textiles, soft furnishings and glassware.

8.4 Canterbury's in-centre foodstore provision is trading below benchmarks primarily due to the mainly top-up shopping role that these stores perform, and the pattern of expenditure that favours out/edge-of-centres stores for main food shopping trips.

8.5 Overall, convenience floorspace in the City Council area retains almost all of its available expenditure in Zones 1-6 (with a convenience trade retention rate of 91%) although the strongest performers are out-of-centre stores. Budget/value operators appear to be trading very well, and small independent operators are performing strongly in Canterbury city centre. The Canterbury urban area benefits from a good level of choice and competition in the convenience sector. Overall, this evidence indicates that there is no qualitative need at present for additional convenience facilities in the area.

8.6 Despite its strengths, health and attractiveness, Canterbury's comparison retail provision still faces challenges in the form of increasing competition from on-line trade, out-of-centre retailing and redevelopment opportunities at competing centres (such as Dover and Ashford). 18.3% of all comparison expenditure available in the survey area (Zones 1-14) is spent on-line; this amounted to

£739.5 million in 2015 - this expenditure is greater than the total turnover of Canterbury city centre and all the retail warehousing at Sturry Road and Wincheap combined. In addition, approximately £56.3 million of comparison expenditure is leaking out to destinations beyond the council area, such as Westwood Shopping Centre and Bluewater.

8.7 Overall Canterbury leisure offer is mixed. The restaurant, café, pubs and bar offer is very well represented with a good choice of high end and mid-market operators. For the most part leisure facilities in Canterbury seem to be catering reasonably well to the needs of the resident population There are, however, some gaps in Canterbury's commercial leisure offer, particularly in relation to cinemas, ten-pin bowling, and the health & fitness sectors. Few people in the Council area claim to use indoor sports facilities locally, while destinations such as Maidstone and Ashford are proving more popular for such activity. The household survey provides evidence that a considerable number of people in the City Council area are travelling out to other towns and destinations to satisfy their leisure-based requirements.

Conclusions

8.8 Canterbury City is a healthily performing centre with a diverse retail offer and wide regional appeal. It (along with Maidstone) is the dominant comparison shopping destination in Kent and benefits from a strong tourism draw. However there are gaps in both the retail and leisure offer and Canterbury is not catering comprehensively to the all retail and commercial leisure needs.

8.9 While the character and heritage aspects of the city are of major benefit and contribute to Canterbury's economic success as a retail destination, they also act as a constraint on the future development/redevelopment potential of the primary shopping area.

8.10 We have examined Canterbury city centre's comparison-spend market-share performance over time, and there is evidence that the catchment has been contracting slightly. Canterbury is marginally less popular further afield than it was in 2011 - indicating a slight diminution in Canterbury's regional performance, this may be a result of not meeting the floorspace need identified in the 2011 Retail Study.

8.11 The retail parks serving Canterbury city centre perform an important function, and the combined retail warehousing has an overall market share of 26.4% of available comparison spend in the Council area (Zones 1-6). This retail provision is conveniently located at key access points to the city and may encourage linked trips with the city centre. The availability of large format retail units and a relatively modern shopping environment will persuade some shoppers not to transfer their shopping trip to other competing retail destinations, thereby limiting the potential leakage that could occur as a result of competing development at alternative destinations. Investment in these assets will help retain market share and prevent leakage.

8.12 Our quantitative retail capacity assessment has assumed equilibrium at base year. We have also allowed for existing retail floorspace to improve its sales density at an average efficiency rate of 2.14% per annum over the period 2015-31. This amounts to turnover growth for existing comparison operators of 40% over the plan period. Over and above this growth (and allowing for the impact of commitments) we have calculated additional capacity with the assumption that any new comparison retail floorspace will trade at the existing average Canterbury city centre sales density (£7,557/sqm at 2015 - allowing for annual efficiency growth). This is a highly robust approach and reveals capacity for 8,564 sqm of net comparison floorspace by 2020, growing to 19,924 sqm by 2025, and 33,800 sqm by 2031.

8.13 The convenience capacity assessment undertaken reveals that there is no current need for convenience floorspace, and that forecast expenditure growth will support 266 sqm of additional net retail floorspace by 2025, growing to 2,608 sqm (net) by 2031.

8.14 Both the convenience and comparison need/capacity identified is borough-wide and a judgement as to where it should be accommodated should take into consideration the aspirations for the growth and development of individual centres. These forecasts should be treated as a general indication of quantitative need rather than maximum or minimum floorspace targets. Failure to meet identified need or invest in the existing retail provision could result in a loss of market share over time.

Recommendations

8.15 It is becoming increasingly important for town centres to broaden their focus and not rely entirely on retail to underpin centre health. Leisure uses have an important part to play in ensuring a comprehensive town centre offer, and can contributing to a strong evening economy and wider attraction. We recommend that the Council encourage private investment to fill the identified gaps in the commercial leisure which will help retain footfall and expenditure in Canterbury's urban area.

8.16 Improving the commercial leisure offer will hlep increase dwell times and sustain centre vitality beyond traditional retail hours, to the benefit of existing shops and services that will be in a position to capitalise on linked trips and incidental/pass-by trade.

8.17 We recommend that the Council resist any proposals for out-of-centre convenience foodstores, particularly in the short term, and carefully apply the impact test to such proposals.

8.18 The capacity modelling exercise has revealed a high level of quantitative need for new comparison floorspace over the plan period. Given that Canterbury's retail provision (in-centre and out-of-centre retail warehousing) already retains a healthy proportion of available expenditure, it is important to consider whether there is a qualitative need to accommodate the capacity identified.

8.19 Given the current strong performance of Canterbury's comparison sales densities, and acknowledging the evidence that Canterbury's market share has tapered slightly since 2011, we would expect the city centre's market share to reduce further over time if identified retail need is not met at suitable locations – particularly in light of recent developments in Ashford and proposed lrge scale retail development at Dover. We therefore recommend that the City Council consider pursuing one of two policy options, and devise a retail strategy accordingly.

1. Plan for the future of Canterbury with a reducing market share

2. Plan for Canterbury to retain market share and sustain the position in the retail hierarchy

8.20 Option 1 is a conservative approach that seeks to manage decline positively, in a manner that sustains economic growth. In this case the Council would acknowledge that competing retail development in places such as Dover are likely to draw more trade away from Canterbury over time; and also acknowledge that development opportunities in the city centre are limited and unsuitable for the sensitive accommodation of identified floorspace capacity without affecting the existing character of the city centre, or compromising its function as a heritage asset.

8.21 In this case the Council should pursue a strategy of consolidating the retail core, focussing on measures to achieve qualitative improvements to the overall shopping provision. Such a policy option should anticipate, over the plan period, the likely emergence of Maidstone as the dominant comparison shopping destination in Kent, and also expect investment in Ashford and Dover to attract investment and draw more trade away from Canterbury city centre in the coming years.

8.22 The retail strategy accompanying Option 1 might seek to improve and extend the retail provision at Whitstable and Herne Bay, in an attempt recoup some of the market share that Canterbury would be expected to lose over time – thereby stemming the resultant leakage form the administrative area as a whole (although there may be question marks over the viability of attracting investment to such remote retail centres, and whether there is a sufficient critical mass of retail provision in Herne Bay or even Whitstable to underpin the viability of such a strategy). It would be advisable to market test this strategy in order to gauge deliverability.

8.23 Option 2 is a commercial and defensive approach that seeks to protect Canterbury's position in the retail hierarchy by meeting identified needs in full by either:

a) Seeking to accommodate redevelopment opportunities within the primary shopping area and adopting a more permissive approach to in-centre development proposals in the city core, or

b) Allocating sufficient sites at edge-of-centre or well-connected out-of-centre locations that have the ability to retail expenditure while supporting the focus of shopping in the city centre, or

c) Achieving a combination of a) and b) above.

8.24 The appropriate retail strategy accompanying Option 2 will need to consider whether the city centre can accommodate the scale of the assessed need through redevelopment of underutilised space, expansion of the primary shopping area, or development opportunities at edge-of-centre or well-connected out-of-centre locations with the potential to support and complement the existing provision.

8.25 Some of the capacity identified could be accommodated at a range of small in-centre sites through infill development or comprehensive redevelopment opportunities. It is likely that due to the lack of available sites apparent, the Council should consider accommodating the majority of this need outside the primary shopping area. Should the Council wish to retain Canterbury's market share and position in the retail hierarchy we would recommend that the allocation of one or more sites for major new comparison-led development outside Canterbury city centre.

8.26 Such an allocation, if suitably conditioned and well related to the primary shopping area, could complement the role and function of the city core while meeting the shopping needs (and potentially the leisure needs) of the catchment population, and the commercial needs of potential retailers who may be attracted to Canterbury.

8.27 We recommend that the Council carefully consider, if pursuing this option, the appropriate timeframe for accommodating growth, and at which location or locations. It may be appropriate to manage potential allocations in a phased approach - matching the delivery of floorspace to the capacity forecasts at assessment years - this would ensure that the scale of development can be calibrated to any future update of the capacity assessment, and would any negative impacts on other centres that might otherwise suffer some trade diversion in the event that the entire floorspace capacity over the plan period was delivered within the first five years.

8.28 A judgement as to the appropriateness of Options 1 and 2 above will depend on the Council's vision for the future of the city centre, and the role and function each centre is planned to play in the retail hierarchy over the lifetime of the development plan. The vision should inform the policy option, which should feed into the devising of a complementary retail strategy, and should clearly weigh up the conflicts that may arise between retaining/reducing market share and potential impacts (on heritage assets/choice & competition and centre health).

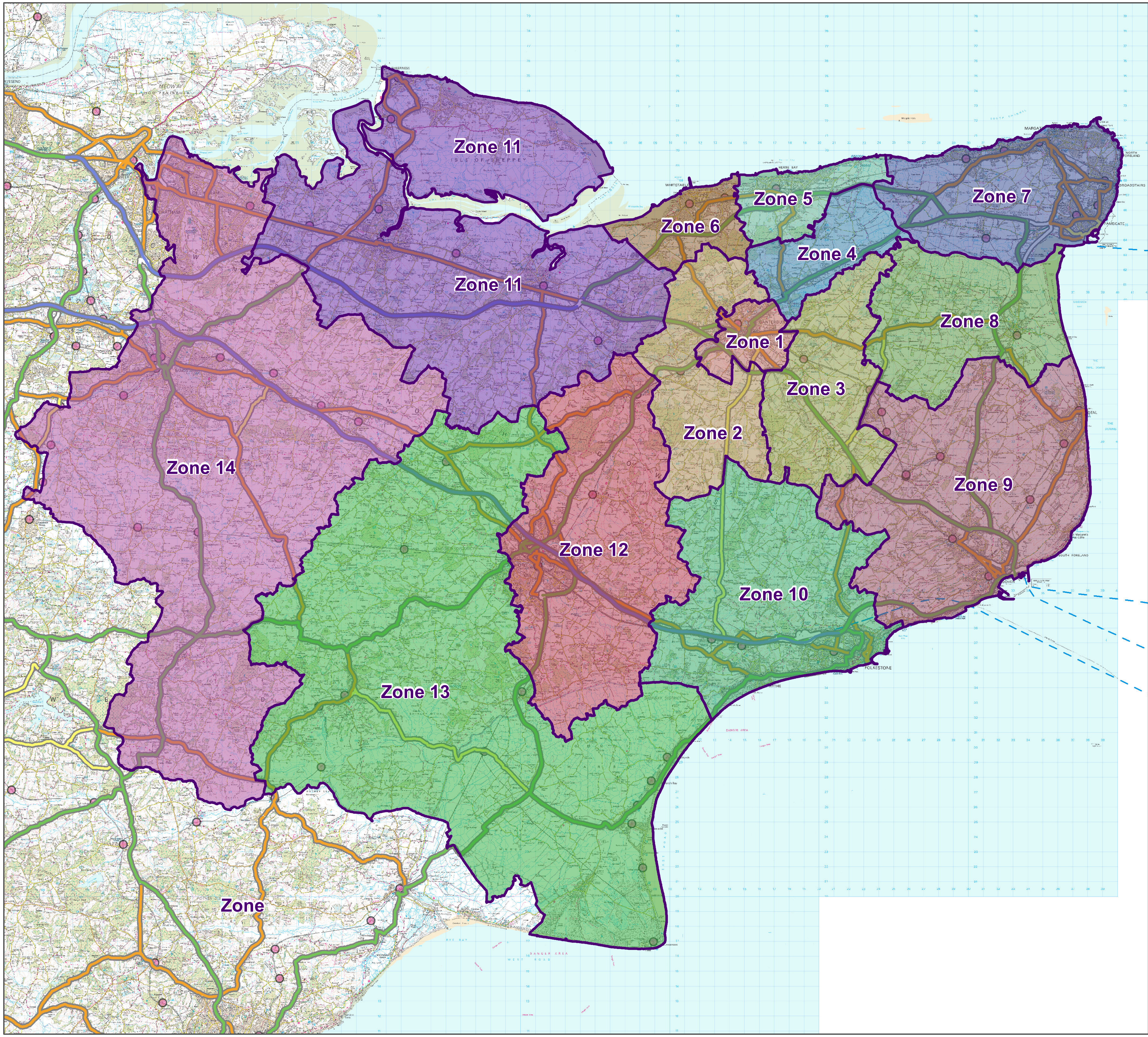
8.29 In accordance with NPPF's the sequential approach to site selection and the town centre first principles the Council should firstly direct new retail and leisure development to the primary shopping area (and sites with the potential for seamless integration with the primary shopping area); secondly allow development at edge-of centre-sites that can benefit from linkages with the retail core and lastly, in the absence of more sequentially suitable sites, meet identified need at out-of-centre locations that are well connected to the town centre.

8.30 We recommend that Canterbury City Centre should be the main focus of any significant development in order to ensure the city can continue to compete effectively in the wider retail network; and that the sequential approach to site selection be rigorously applied to any site allocations for main town centre uses or any relevant development proposals.

Annexes

Annex A

Survey Area Map



Canturbury Survey Area Map

Survey Zone

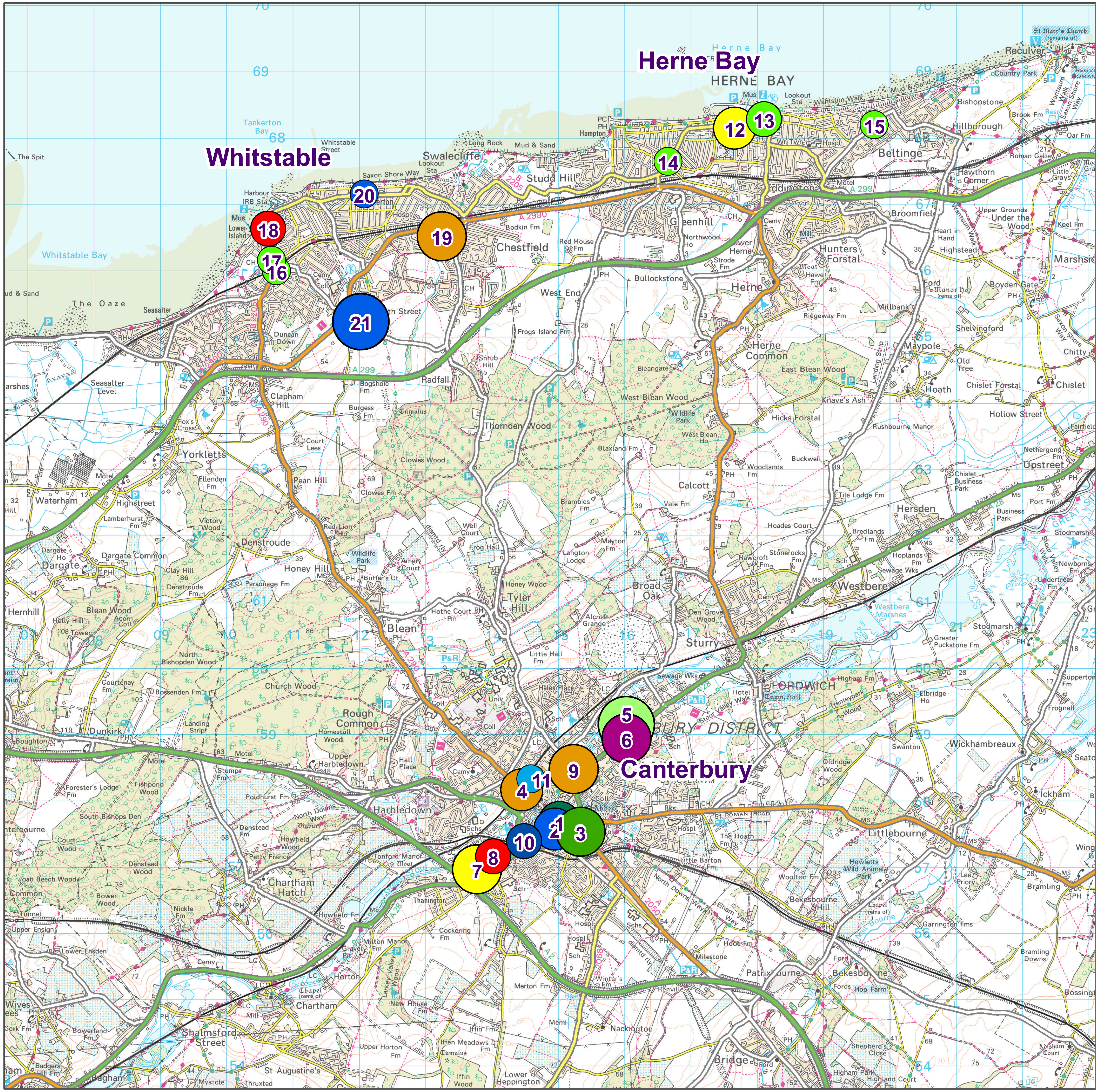
Apr 2015

N W E S

GL Hearn

Annex B

Foodstore Distribution Maps



Canterbury Food Stores Map

Food Store

1 - M&S, St Georges Street
2 - Tesco Metro, Whitefriars Shopping Centre
3 - Waitrose, St. Georges Place
4 - Sainsbury's, St Dunstans Street
5 - Asda, Sturry Road
6 - Lidl, Sturry Road
7 - Morrisons, Perch Road
8 - Iceland, Maynard Road
9 - Sainsbury's, Kingsmead Road
10 - Aldi, St Andrews Close
11 - The Goods Shed, Station Road West
12 - Morrisons, Beach Street, Herne Bay
13 - Co-op, Mortimer Street, Herne Bay
14 - Co-op, 98 Sea Street, Herne Bay
15 - Co-op, Reculver Road, Herne Bay
16 - Co-op, 14-16 Canterbury Road, Whitstable
17 - Co-op, 58-60 Oxford Street, Whitstable
18 - Iceland, 34-36 High Street, Whitstable
19 - Sainsbury's, Reeves Way, Whitstable
20 - Tesco, 141 Tankerton Road, Whitstable
21 - Tesco, Whitstable EXTRA, Whitstable

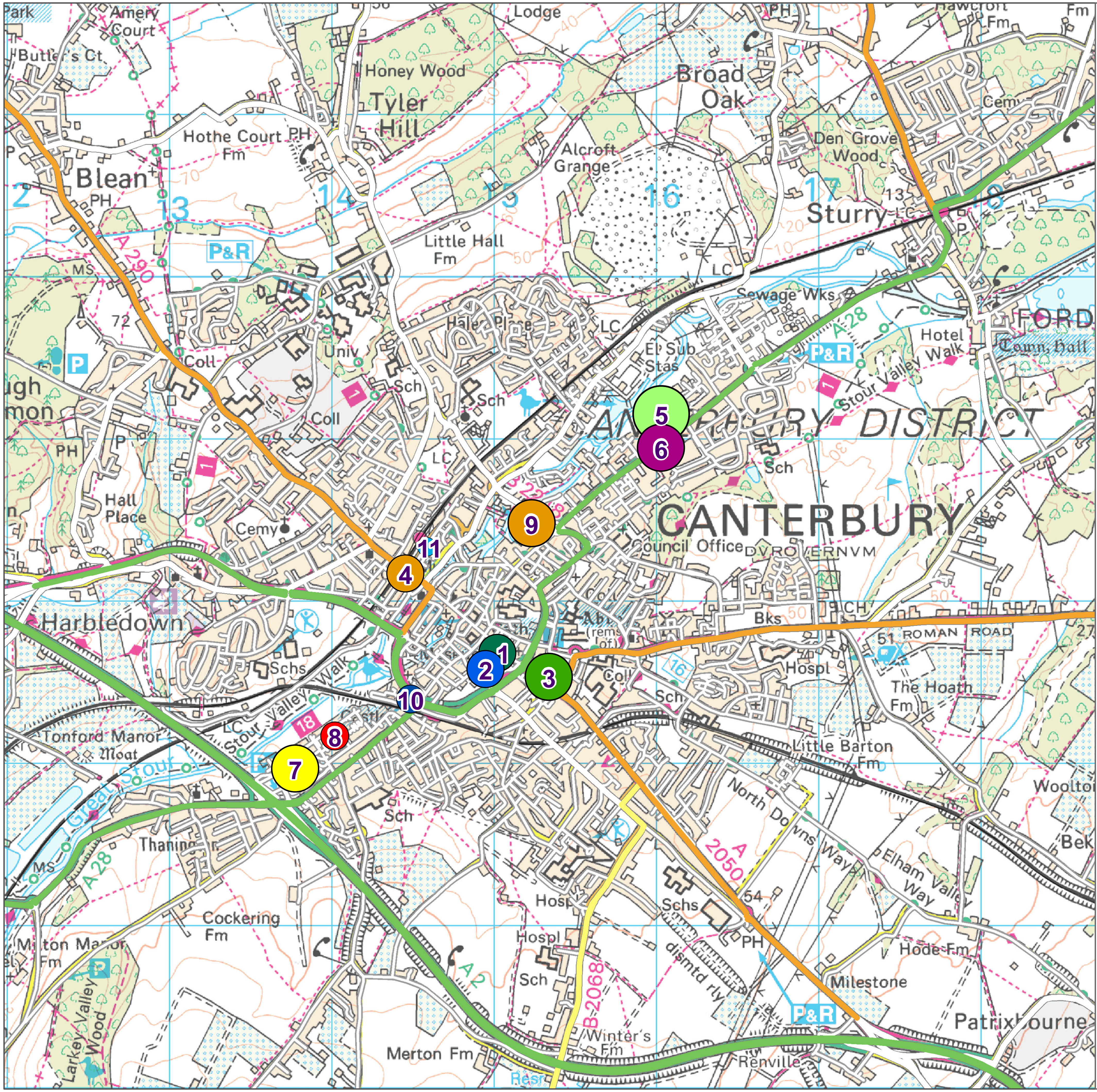
June 2015

GL Hearn

Canterbury City Food Stores Map

Food Store

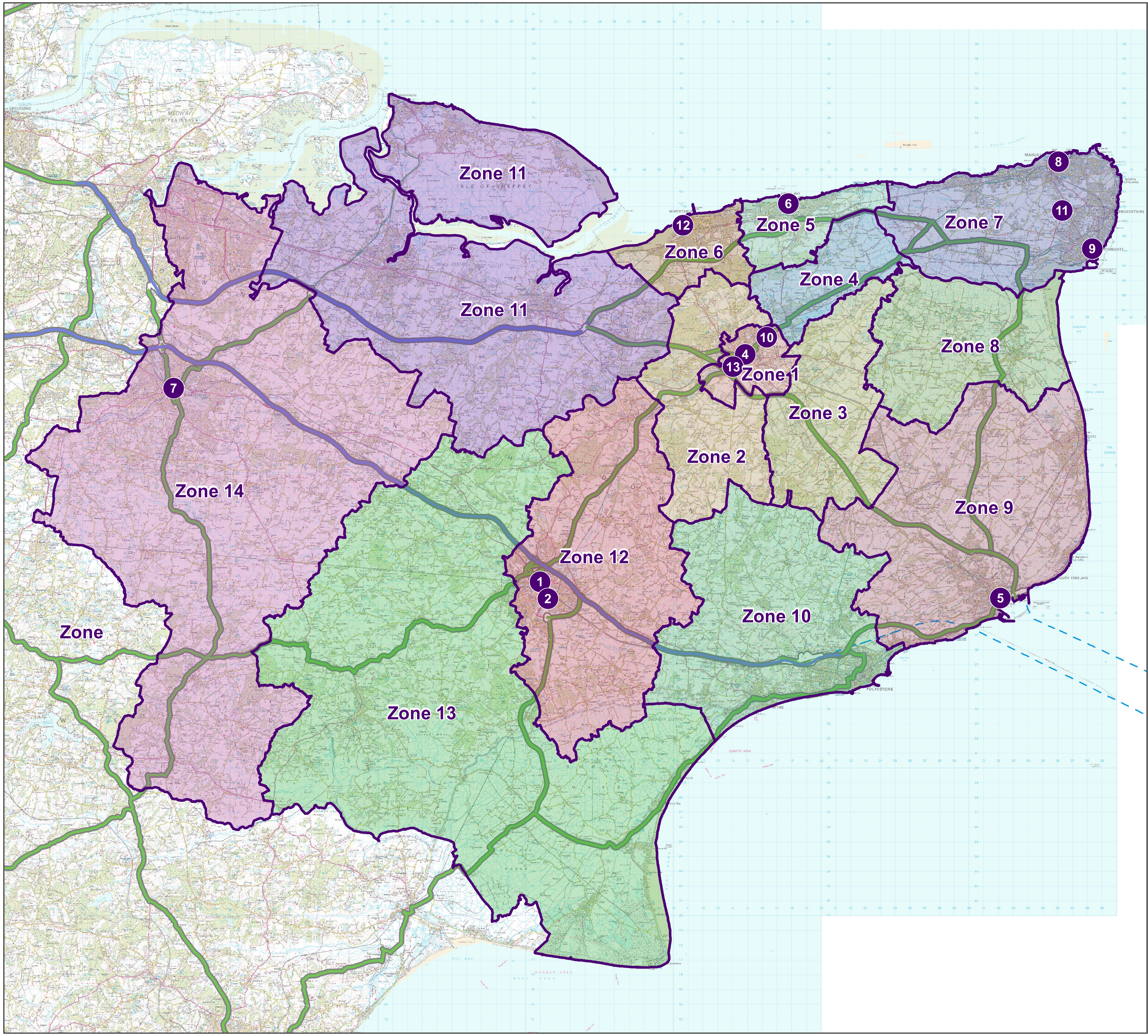
1 - M&S, St Georges Street
2 - Tesco Metro, Whitefriars Shopping Centre
3 - Waitrose, St. Georges Place
4 - Sainsbury's, St Dunstans Street
5 - Asda, Sturry Road
6 - Lidl, Sturry Road
7 - Morrisons, Perch Road
8 - Iceland, Maynard Road
9 - Sainsbury's, Kingsmead Road
10 - Aldi, St Andrews Close
11 - The Goods Shed, Station Road West



June 2015

Annex C

Key Comparison Destinations Map



Kent Major Retail Centres

1 - Ashford
2 - Ashford Retail Parks
3 - Bluewater Shopping Centre
4 - Canterbury City Centre
5 - Dover
6 - Herne Bay
7 - Maidstone
8 - Margate
9 - Ramsgate
10 - Sturry Road
11 - Westwood / Broadstairs
12 - Whitstable
13 - Wincheap

Jun 2015

GL Hearn

Annex D

Convenience Floorspace Capacity Modelling Tables

Canterbury City Council **03/06/2015**
Retail Study
Convenience Capacity Assessment

TABLE 1: POPULATION FORECASTS

Survey Area	2015	2020	2025	2031	Increase 2015 -2031	Growth 2015 - 2031
Zone 1	49,625	51,545	53,340	55,564	5,939	12%
Zone 2	15,460	15,905	16,487	17,447	1,987	13%
Zone 3	8,559	8,892	9,187	9,558	999	12%
Zone 4	9,460	9,832	10,154	10,545	1,085	11%
Zone 5	40,460	42,074	43,513	45,246	4,786	12%
Zone 6	34,485	35,877	37,094	38,540	4,055	12%
Zone 7	139,005	144,965	150,870	156,570	17,565	13%
Zone 8	14,213	14,558	14,913	15,244	1,031	7%
Zone 9	98,952	101,346	103,810	106,008	7,056	7%
Zone 10	87,341	89,492	92,007	94,719	7,378	8%
Zone 11	143,492	153,148	162,212	170,548	27,056	19%
Zone 12	81,426	86,735	91,588	95,989	14,563	18%
Zone 13	66,391	69,738	73,001	76,014	9,623	14%
Zone 14	346,175	365,244	383,290	400,308	54,133	16%
Population	**1,135,044**	**1,189,351**	**1,241,466**	**1,292,300**	**157,256**	**14%**

Source:

Experian Population Forecasts Micromarketer May 2015

TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE **2013 Price base**

Survey Area	2015	2020	2025	2031
Zone 1	£1,811	£1,866	£1,923	£1,993
Zone 2	£2,148	£2,213	£2,280	£2,364
Zone 3	£2,372	£2,444	£2,518	£2,610
Zone 4	£2,034	£2,096	£2,159	£2,238
Zone 5	£1,923	£1,981	£2,041	£2,116
Zone 6	£2,072	£2,135	£2,200	£2,280
Zone 7	£2,063	£2,126	£2,190	£2,270
Zone 8	£2,425	£2,499	£2,574	£2,669
Zone 9	£2,112	£2,176	£2,242	£2,324
Zone 10	£2,130	£2,195	£2,261	£2,344
Zone 11	£2,063	£2,126	£2,190	£2,270
Zone 12	£2,020	£2,081	£2,144	£2,223
Zone 13	£2,333	£2,404	£2,477	£2,567
Zone 14	£2,056	£2,118	£2,183	£2,262

Source:

Convenience expenditure growth rate derived from Experian Retail Planner Briefing Note 12 (October 2014), Figure 1a

Notes:

Spend per capita figures in 2013 price base

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£ million)

Survey Area	2015	2020	2025	2031	Increase 2015-2031 (£M)	Growth 2015-2031 (%)
Zone 1	£89.87	£96.18	£102.55	£110.73	£20.86	23.2%
Zone 2	£33.21	£35.20	£37.60	£41.24	£8.03	24.2%
Zone 3	£20.30	£21.73	£23.13	£24.95	£4.65	22.9%
Zone 4	£19.24	£20.60	£21.93	£23.60	£4.36	22.7%
Zone 5	£77.80	£83.36	£88.83	£95.75	£17.94	23.1%
Zone 6	£71.45	£76.59	£81.59	£87.87	£16.42	23.0%
Zone 7	£286.76	£308.14	£330.42	£355.44	£68.68	23.9%
Zone 8	£34.47	£36.37	£38.39	£40.68	£6.21	18.0%
Zone 9	£208.98	£220.54	£232.76	£246.37	£37.39	17.9%
Zone 10	£186.03	£196.40	£208.05	£222.01	£35.98	19.3%
Zone 11	£296.02	£325.53	£355.26	£387.17	£91.15	30.8%
Zone 12	£164.48	£180.52	£196.41	£213.37	£48.89	29.7%
Zone 13	£154.89	£167.63	£180.81	£195.15	£40.26	26.0%
Zone 14	£711.72	£773.72	£836.60	£905.68	£193.96	27.3%
TOTAL	**£2,355.21**	**£2,542.52**	**£2,734.34**	**£2,950.00**	**£594.80**	**16.1%**

Source:

Tables 1 & 2

TABLE 4: MARKET SHARES (total convenience exenditure) - 2014

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**16.2%**	**6.8%**	**5.3%**	**5.2%**	**0.0%**	**1.3%**	**0.2%**	**1.7%**	**0.0%**	**0.4%**	**0.2%**	**0.6%**	**0.0%**	**0.0%**	**1.0%**
M&S, St Georges Street	6.5%	2.9%	2.6%	3.1%	0.0%	0.8%	0.0%	1.3%	0.0%	0.4%	0.0%	0.2%	0.0%	0.0%	0.4%
Tesco Metro, Whitefriars Shopping Centre	5.1%	1.4%	2.1%	1.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Local shops	4.5%	2.4%	0.6%	0.9%	0.0%	0.5%	0.2%	0.0%	0.0%	0.0%	0.2%	0.4%	0.0%	0.0%	0.3%
Canterbury (Edge-of-Centre)	**13.3%**	**4.3%**	**14.1%**	**8.6%**	**0.9%**	**2.6%**	**0.0%**	**5.8%**	**0.0%**	**0.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**
Waitrose, St. Georges Place	12.2%	4.3%	14.1%	8.6%	0.9%	2.6%	0.0%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Sainsbury's, St Dunstans Street	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%
Canterbury (Out-of-Centre)	**62.5%**	**67.2%**	**54.3%**	**64.3%**	**17.5%**	**14.6%**	**1.1%**	**19.4%**	**8.3%**	**0.7%**	**1.8%**	**1.9%**	**0.3%**	**0.0%**	**7.0%**
Asda, Sturry Road	14.4%	2.5%	6.2%	41.4%	9.1%	7.7%	0.0%	7.3%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
Lidl, Sturry Road	0.5%	0.0%	5.1%	6.6%	0.9%	0.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Morrisons, Perch Road	20.7%	32.9%	22.7%	2.6%	2.9%	0.0%	0.0%	6.4%	5.7%	0.0%	0.9%	1.3%	0.0%	0.0%	2.4%
Iceland, Maynard Road	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Kingsmead Road	17.1%	18.6%	15.9%	12.7%	0.3%	1.5%	0.7%	2.1%	0.5%	0.7%	0.0%	0.6%	0.0%	0.0%	1.5%
Aldi, St Andrews Close	6.7%	13.2%	2.8%	1.0%	4.4%	4.5%	0.0%	3.6%	0.0%	0.0%	0.9%	0.0%	0.3%	0.0%	0.9%
The Goods Shed, Station Road West	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other out-of-centre	1.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Herne Bay (In-Centre)	**0.0%**	**0.4%**	**0.0%**	**1.4%**	**43.0%**	**2.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.5%**
Morrisons, Beach Street, Herne Bay	0.0%	0.0%	0.0%	1.1%	31.9%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Co-op, Mortimer Street, Herne Bay	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Shops	0.0%	0.4%	0.0%	0.3%	9.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Herne Bay (Out-of-Centre)	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**
Co-op, 98 Sea Street, Herne Bay	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Co-op, Reculver Road, Herne Bay	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whitstable (In-Centre)	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**	**15.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.5%**
Co-op, 14-16 Canterbury Road, Whitstable	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Co-op, 58-60 Oxford Street, Whitstable	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, 34-36 High Street, Whitstable	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local shops, Whitstable	0.0%	0.0%	0.0%	0.0%	0.3%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Whitstable (Out-of-Centre)	**0.0%**	**9.8%**	**0.0%**	**1.1%**	**25.9%**	**58.4%**	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**3.0%**
Sainsbury's, Reeves Way, Whitstable	0.0%	1.2%	0.0%	0.5%	16.7%	24.8%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Tesco, 141 Tankerton Road, Whitstable	0.0%	1.5%	0.0%	0.0%	1.4%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Tesco, Whitstable EXTRA, Whitstable	0.0%	7.2%	0.0%	0.5%	7.8%	26.9%	0.6%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	1.4%
Sturry (In-Centre)	**0.0%**	**0.0%**	**0.5%**	**9.5%**	**0.0%**	**0.0%**	**0.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**
Co-op, High Street, Sturry	0.0%	0.0%	0.0%	6.6%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local shops, Sturry	0.0%	0.0%	0.5%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Destinations in Administrative Jurisdiction															**0.0%**
Local shops, Blean	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Littlebourne	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, Bridge	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Destinations Beyond Administrative Jurisdiction															**0.0%**
Tesco, Dover EXTRA, Dover	0.9%	0.0%	1.1%	0.0%	0.0%	0.0%	3.2%	4.5%	12.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.6%
Morrisons, Bridge Street, Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Morrisons, Cheriton Rd, Folkestone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.4%	0.0%	0.0%	0.7%	0.0%	1.0%
Sainsbury's, West Street, Deal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	9.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Other	1.9%	8.0%	10.4%	5.2%	2.9%	2.5%	85.0%	51.2%	52.4%	79.6%	87.7%	93.6%	87.4%	90.9%	73.3%
Internet - Home Delivery	**5.2%**	**1.0%**	**9.5%**	**4.8%**	**6.6%**	**2.7%**	**9.3%**	**14.5%**	**6.9%**	**5.8%**	**9.3%**	**3.8%**	**11.5%**	**9.1%**	**8.0%**
Asda	2.9%	0.0%	0.5%	1.7%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	2.5%	1.6%	0.0%	2.9%	1.7%
Morrisons	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury’s	0.9%	0.0%	0.5%	0.0%	2.3%	0.8%	0.5%	0.8%	0.0%	0.0%	2.4%	0.0%	2.7%	1.1%	1.0%
Tesco	0.5%	1.0%	5.3%	1.3%	2.9%	1.1%	7.7%	10.0%	3.6%	5.8%	4.4%	2.2%	7.8%	5.1%	4.9%
Ocado	0.9%	0.0%	2.7%	1.8%	0.5%	0.8%	1.1%	3.8%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.4%

Source: Household Telephone Survey

TABLE 5: TURNOVER (combined convenience exenditure) - 2015

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**£14.5**	**£2.3**	**£1.1**	**£1.0**	**£0.0**	**£1.0**	**£0.6**	**£0.6**	**£0.0**	**£0.7**	**£0.6**	**£1.0**	**£0.0**	**£0.0**	**£23.3**
M&S, St Georges Street	£5.9	£1.0	£0.5	£0.6	£0.0	£0.6	£0.0	£0.4	£0.0	£0.7	£0.0	£0.3	£0.0	£0.0	£10.0
Tesco Metro, Whitefriars Shopping Centre	£4.6	£0.5	£0.4	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.9
Local shops	£4.1	£0.8	£0.1	£0.2	£0.0	£0.4	£0.6	£0.0	£0.0	£0.0	£0.6	£0.7	£0.0	£0.0	£7.5
Canterbury (Edge-of-Centre)	**£11.9**	**£1.4**	**£2.9**	**£1.6**	**£0.7**	**£1.9**	**£0.0**	**£2.0**	**£0.0**	**£0.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£23.1**
Waitrose, St. Georges Place	£10.9	£1.4	£2.9	£1.6	£0.7	£1.9	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£21.4
Sainsbury's, St Dunstans Street	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£1.7
Canterbury (Out-of-Centre)	**£56.2**	**£22.3**	**£11.0**	**£12.4**	**£13.6**	**£10.4**	**£3.3**	**£6.7**	**£17.4**	**£1.3**	**£5.4**	**£3.2**	**£0.5**	**£0.0**	**£163.8**
Asda, Sturry Road	£12.9	£0.8	£1.3	£8.0	£7.0	£5.5	£0.0	£2.5	£4.5	£0.0	£0.0	£0.0	£0.0	£0.0	£42.5
Lidl, Sturry Road	£0.4	£0.0	£1.0	£1.3	£0.7	£0.6	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.4
Morrisons, Perch Road	£18.6	£10.9	£4.6	£0.5	£2.2	£0.0	£0.0	£2.2	£11.9	£0.0	£2.6	£2.2	£0.0	£0.0	£55.9
Iceland, Maynard Road	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Sainsbury's, Kingsmead Road	£15.3	£6.2	£3.2	£2.4	£0.2	£1.1	£2.0	£0.7	£1.0	£1.3	£0.0	£1.0	£0.0	£0.0	£34.6
Aldi, St Andrews Close	£6.0	£4.4	£0.6	£0.2	£3.4	£3.2	£0.0	£1.3	£0.0	£0.0	£2.8	£0.0	£0.5	£0.0	£22.2
The Goods Shed, Station Road West	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Other out-of-centre	£1.7	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Herne Bay (In-Centre)	**£0.0**	**£0.1**	**£0.0**	**£0.3**	**£33.5**	**£1.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£35.6**
Morrisons, Beach Street, Herne Bay	£0.0	£0.0	£0.0	£0.2	£24.9	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.4
Co-op, Mortimer Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3
Local Shops	£0.0	£0.1	£0.0	£0.1	£7.3	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.9
Herne Bay (Out-of-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.2**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.2**
Co-op, 98 Sea Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Co-op, Reculver Road, Herne Bay	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Whitstable (In-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.2**	**£11.1**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£11.3**
Co-op, 14-16 Canterbury Road, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.7
Co-op, 58-60 Oxford Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Iceland, 34-36 High Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Local shops, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.2	£7.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.2
Whitstable (Out-of-Centre)	**£0.0**	**£3.3**	**£0.0**	**£0.2**	**£20.1**	**£41.7**	**£2.8**	**£0.0**	**£0.0**	**£0.0**	**£2.9**	**£0.0**	**£0.0**	**£0.0**	**£71.0**
Sainsbury's, Reeves Way, Whitstable	£0.0	£0.4	£0.0	£0.1	£13.0	£17.7	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£32.2
Tesco, 141 Tankerton Road, Whitstable	£0.0	£0.5	£0.0	£0.0	£1.1	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.3
Tesco, Whitstable EXTRA, Whitstable	£0.0	£2.4	£0.0	£0.1	£6.1	£19.2	£1.8	£0.0	£0.0	£0.0	£2.9	£0.0	£0.0	£0.0	£32.5
Sturry (In-Centre)	**£0.0**	**£0.0**	**£0.1**	**£1.8**	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.5**
Co-op, High Street, Sturry	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Local shops, Sturry	£0.0	£0.0	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Other Destinations in Administrative Jurisdiction															
Local shops, Blean	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Local shops, Littlebourne	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Local shops, Bridge	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Destinations Beyond Administrative Jurisdiction															
Tesco, Dover EXTRA, Dover	£0.8	£0.0	£0.2	£0.0	£0.0	£0.0	£9.2	£1.6	£25.0	£1.3	£0.0	£0.0	£0.0	£0.0	£38.2
Morrisons, Bridge Street, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£22.6	£0.0	£0.0	£0.0	£0.0	£0.0	£22.6
Morrisons, Cheriton Rd, Folkestone	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£23.1	£0.0	£0.0	£1.1	£0.0	£24.2
Sainsbury's, West Street, Deal	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£20.0	£0.0	£0.0	£0.0	£0.0	£0.0	£21.0
Other	£1.7	£2.7	£2.1	£1.0	£2.3	£1.8	£243.6	£17.6	£109.6	£148.1	£259.6	£154.0	£135.4	£646.7	£1,726.3
Internet - Home Delivery	**£4.7**	**£0.3**	**£1.9**	**£0.9**	**£5.1**	**£1.9**	**£26.7**	**£5.0**	**£14.4**	**£10.7**	**£27.5**	**£6.2**	**£17.9**	**£65.0**	**£188.2**
Asda	£2.7	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£6.8	£0.0	£7.4	£2.7	£0.0	£20.4	£40.3
Morrisons	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Iceland	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Sainsbury's	£0.8	£0.0	£0.1	£0.0	£1.8	£0.5	£1.3	£0.3	£0.0	£0.0	£7.0	£0.0	£4.2	£8.0	£24.0
Tesco	£0.4	£0.3	£1.1	£0.3	£2.3	£0.8	£22.2	£3.4	£7.6	£10.7	£13.0	£3.6	£12.0	£36.6	£114.4
Ocado	£0.8	£0.0	£0.5	£0.3	£0.4	£0.5	£3.1	£1.3	£0.0	£0.0	£0.0	£0.0	£1.7	£0.0	£8.7

Source: Tables 3 and 4

TABLE 6: TRADE DRAW PATTERN (from survey area) - 2015

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**62%**	**10%**	**5%**	**4%**	**0%**	**4%**	**2%**	**2%**	**0%**	**3%**	**3%**	**4%**	**0%**	**0%**	**100%**
M&S, St Georges Street	59%	10%	5%	6%	0%	6%	0%	4%	0%	7%	0%	3%	0%	0%	100%
Tesco Metro, Whitefriars Shopping Centre	78%	8%	7%	4%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	100%
Local shops	55%	11%	2%	2%	0%	5%	8%	0%	0%	0%	8%	9%	0%	0%	100%
Canterbury (Edge-of-Centre)	**52%**	**6%**	**12%**	**7%**	**3%**	**8%**	**0%**	**9%**	**0%**	**3%**	**0%**	**0%**	**0%**	**0%**	**100%**
Waitrose, St. Georges Place	51%	7%	13%	8%	3%	9%	0%	9%	0%	0%	0%	0%	0%	0%	100%
Sainsbury's, St Dunstans Street	59%	0%	0%	0%	0%	0%	0%	0%	0%	41%	0%	0%	0%	0%	100%
Canterbury (Out-of-Centre)	**34%**	**14%**	**7%**	**8%**	**8%**	**6%**	**2%**	**4%**	**11%**	**1%**	**3%**	**2%**	**0%**	**0%**	**100%**
Asda, Sturry Road	30%	2%	3%	19%	17%	13%	0%	6%	10%	0%	0%	0%	0%	0%	100%
Lidl, Sturry Road	8%	0%	19%	24%	14%	10%	25%	0%	0%	0%	0%	0%	0%	0%	100%
Morrisons, Perch Road	33%	20%	8%	1%	4%	0%	0%	4%	21%	0%	5%	4%	0%	0%	100%
Iceland, Maynard Road	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Sainsbury's, Kingsmead Road	44%	18%	9%	7%	1%	3%	6%	2%	3%	4%	0%	3%	0%	0%	100%
Aldi, St Andrews Close	27%	20%	3%	1%	15%	15%	0%	6%	0%	0%	12%	0%	2%	0%	100%
The Goods Shed, Station Road West	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Other out-of-centre	84%	0%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Herne Bay (In-Centre)	**0%**	**0%**	**0%**	**1%**	**94%**	**5%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**100%**
Morrisons, Beach Street, Herne Bay	0%	0%	0%	1%	94%	5%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Co-op, Mortimer Street, Herne Bay	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Local Shops	0%	2%	0%	1%	93%	5%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Herne Bay (Out-of-Centre)	**0%**	**0%**	**0%**	**0%**	**100%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**100%**
Co-op, 98 Sea Street, Herne Bay	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Co-op, Reculver Road, Herne Bay	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Whitstable (In-Centre)	**0%**	**0%**	**0%**	**0%**	**2%**	**98%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**100%**
Co-op, 14-16 Canterbury Road, Whitstable	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Co-op, 58-60 Oxford Street, Whitstable	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Iceland, 34-36 High Street, Whitstable	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Local shops, Whitstable	0%	0%	0%	0%	3%	97%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Whitstable (Out-of-Centre)	**0%**	**5%**	**0%**	**0%**	**28%**	**59%**	**4%**	**0%**	**0%**	**0%**	**4%**	**0%**	**0%**	**0%**	**100%**
Sainsbury's, Reeves Way, Whitstable	0%	1%	0%	0%	40%	55%	3%	0%	0%	0%	0%	0%	0%	0%	100%
Tesco, 141 Tankerton Road, Whitstable	0%	8%	0%	0%	17%	75%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Tesco, Whitstable EXTRA, Whitstable	0%	7%	0%	0%	19%	59%	5%	0%	0%	0%	9%	0%	0%	0%	100%
Sturry (In-Centre)	**0%**	**0%**	**4%**	**73%**	**0%**	**0%**	**23%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**100%**
Co-op, High Street, Sturry	0%	0%	0%	69%	0%	0%	31%	0%	0%	0%	0%	0%	0%	0%	100%
Local shops, Sturry	0%	0%	17%	83%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Other Destinations in Administrative Jurisdiction															
Local shops, Blean	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Local shops, Littlebourne	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Local shops, Bridge	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Destinations Beyond Administrative Jurisdiction															
Tesco, Dover EXTRA, Dover	2%	0%	1%	0%	0%	0%	24%	4%	65%	4%	0%	0%	0%	0%	100%
Morrisons, Bridge Street, Dover	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
Morrisons, Cheriton Rd, Folkestone	0%	0%	0%	0%	0%	0%	0%	0%	0%	95%	0%	0%	5%	0%	100%
Sainsbury's, West Street, Deal	0%	0%	0%	0%	0%	0%	0%	5%	95%	0%	0%	0%	0%	0%	100%
Other	0%	0%	0%	0%	0%	0%	14%	1%	6%	9%	15%	9%	8%	37%	100%
Internet - Home Delivery	**2%**	**0%**	**1%**	**0%**	**3%**	**1%**	**14%**	**3%**	**8%**	**6%**	**15%**	**3%**	**9%**	**35%**	**100%**
Asda	7%	0%	0%	1%	0%	0%	0%	0%	17%	0%	18%	7%	0%	51%	100%
Morrisons	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Iceland	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Sainsbury's	3%	0%	0%	0%	7%	2%	6%	1%	0%	0%	29%	0%	17%	33%	100%
Tesco	0%	0%	1%	0%	2%	1%	19%	3%	7%	9%	11%	3%	11%	32%	100%
Ocado	9%	0%	6%	4%	4%	6%	36%	15%	0%	0%	0%	0%	19%	0%	100%

Source: Table 5

TABLE 7: EXISTING TRADING PERFORMANCE - 2015
(Convenience goods floorspace provision and turnover figures)

Centre	Location	Destination	[A] Net Convenience Floorspace (sqm)	[B] Market Share From Survey Area (%)	[C] Turnover from Survey Area (£Ms)	[D] Inflow (%)	[E] Total Turnover (£Ms)	[F] Actual Sales Densities (£/sqm)
CANTERBURY	In-Centre	M&S, St Georges Street	1,413	0.4%	£10.0	5.0%	£10.5	£7,428
		Tesco Metro, Whitefriars Shopping Centre	918	0.2%	£5.9	5.0%	£6.2	£6,744
		Local shops	2,281	0.3%	£7.5	5.0%	£7.9	£3,445
		Total	**4,612**	**1.0%**	**£23.3**	**-**	**£24.5**	**£5,322**
	Edge-of-Centre	Waitrose, St. Georges Place	1,872	0.9%	£21.4	5.0%	£22.6	£12,056
		Sainsbury's, St Dunstans Street	150	0.1%	£1.7	5.0%	£1.8	£11,823
		Total	**2,022**	**1.0%**	**£23.1**	**-**	**£24.3**	**£12,039**
		Canterbury Town Centre Total (in & Edge)	**6,634**	**2.0%**	**£46.4**	**-**	**£48.9**	**£7,369**
	Out-of-Centre	Asda, Sturry Road	3,255	1.8%	£42.5	-	£42.5	£13,062
		Lidl, Sturry Road	1,661	0.2%	£5.4	-	£5.4	£3,226
		Morrisons, Perch Road	2,309	2.4%	£55.9	-	£55.9	£24,204
		Iceland, Maynard Road	495	0.0%	£0.8	-	£0.8	£1,631
		Sainsbury's, Kingsmead Road	2,031	1.5%	£34.6	-	£34.6	£17,020
		Aldi, St Andrews Close	716	0.9%	£22.2	-	£22.2	£31,051
		The Goods Shed, Station Road West	100	0.0%	£0.4	-	£0.4	£4,181
		Other out-of-centre	-	0.1%	£2.0	-	£2.0	-
		Total	**10,567**	**7.0%**	**£163.8**	**-**	**£163.8**	**-**
		Canterbury Urban Area Total	**17,201**	**8.9%**	**£210.2**	**-**	**£212.7**	**-**
HERNE BAY	In-Centre	Morrisons, Beach Street, Herne Bay	1,369	1.1%	£26.4	-	£26.4	£19,265
		Co-op, Mortimer Street, Herne Bay	428	0.1%	£1.3	-	£1.3	£3,098
		Local Shops	2,151	0.3%	£7.9	-	£7.9	£3,651
		Total	**3,948**	**1.5%**	**£35.6**	**-**	**£35.6**	**£9,005**
	Out-of-Centre	Co-op, 98 Sea Street, Herne Bay	140	0.1%	£0.0	-	£0.0	£5
		Co-op, Reculver Road, Herne Bay	134	0.0%	£0.4	-	£0.4	£3,312
		Total	**274**	**0.1%**	**£0.4**	**-**	**£0.4**	**£1,622**
		Herne Bay Urban Area Total	**4,222**	**1.6%**	**£36.0**	**-**	**£36.0**	**£8,526**
WHITSTABLE	In-Centre	Co-op, 14-16 Canterbury Road, Whitstable	147	0.1%	£1.7	-	£1.7	£11,573
		Co-op, 58-60 Oxford Street, Whitstable	215	0.0%	£0.4	-	£0.4	£2,089
		Iceland, 34-36 High Street, Whitstable	397	0.1%	£2.0	-	£2.0	£4,943
		Local shops, Whitstable	2,550	0.3%	£7.2	-	£7.2	£2,835
		Total	**3,309**	**0.5%**	**£11.3**	**-**	**£11.3**	**£3,428**
	Out-of-Centre	Sainsbury's, Reeves Way, Whitstable	1,763	1.4%	£32.2	-	£32.2	£18,267
		Tesco, 141 Tankerton Road, Whitstable	123	0.3%	£6.3		£6.3	£51,097
		Tesco, Whitstable EXTRA, Whitstable	2,967	1.4%	£32.5	-	£32.5	£10,950
		Total	**4,853**	**3.0%**	**£71.0**	**-**	**£71.0**	**£14,629**
		Whitstable Urban Area Total	**8,162**	**3.5%**	**£82.3**	**-**	**£82.3**	**£10,088**

Source:

[A] = IGD, historic planning applications and GLH research/estimates

[B] = Table 4 (Primary evidence, derived from the results of the Household Telephone Survey)

[C] = Table 5

[D] = Assumption carrie dover from the 2011 DTZ Retail Study

[E] = Applying [D] to [C]

[F] = [E] / [A]

TABLE 8: TURNOVER (combined convenience exenditure) - 2020

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**£15.6**	**£2.4**	**£1.1**	**£1.1**	**£0.0**	**£1.0**	**£0.6**	**£0.6**	**£0.0**	**£0.7**	**£0.7**	**£1.1**	**£0.0**	**£0.0**	**£25.0**
M&S, St Georges Street	£6.3	£1.0	£0.6	£0.6	£0.0	£0.6	£0.0	£0.5	£0.0	£0.7	£0.0	£0.3	£0.0	£0.0	£10.7
Tesco Metro, Whitefriars Shopping Centre	£4.9	£0.5	£0.5	£0.2	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.3
Local shops	£4.4	£0.8	£0.1	£0.2	£0.0	£0.4	£0.6	£0.0	£0.0	£0.0	£0.7	£0.8	£0.0	£0.0	£8.0
Canterbury (Edge-of-Centre)	**£12.8**	**£1.5**	**£3.1**	**£1.8**	**£0.8**	**£2.0**	**£0.0**	**£2.1**	**£0.0**	**£0.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£24.7**
Waitrose, St. Georges Place	£11.7	£1.5	£3.1	£1.8	£0.8	£2.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£22.9
Sainsbury's, St Dunstans Street	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£1.8
Canterbury (Out-of-Centre)	**£60.1**	**£23.6**	**£11.8**	**£13.3**	**£14.6**	**£11.2**	**£3.5**	**£7.0**	**£18.4**	**£1.4**	**£5.9**	**£3.5**	**£0.5**	**£0.0**	**£175.0**
Asda, Sturry Road	£13.8	£0.9	£1.4	£8.5	£7.5	£5.9	£0.0	£2.6	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£45.4
Lidl, Sturry Road	£0.4	£0.0	£1.1	£1.4	£0.8	£0.6	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.7
Morrisons, Perch Road	£19.9	£11.6	£4.9	£0.5	£2.4	£0.0	£0.0	£2.3	£12.6	£0.0	£2.9	£2.4	£0.0	£0.0	£59.6
Iceland, Maynard Road	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Sainsbury's, Kingsmead Road	£16.4	£6.5	£3.5	£2.6	£0.2	£1.2	£2.1	£0.7	£1.1	£1.4	£0.0	£1.1	£0.0	£0.0	£36.9
Aldi, St Andrews Close	£6.4	£4.6	£0.6	£0.2	£3.6	£3.5	£0.0	£1.3	£0.0	£0.0	£3.0	£0.0	£0.5	£0.0	£23.8
The Goods Shed, Station Road West	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Other out-of-centre	£1.8	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Herne Bay (In-Centre)	**£0.0**	**£0.1**	**£0.0**	**£0.3**	**£35.8**	**£1.8**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£38.1**
Morrisons, Beach Street, Herne Bay	£0.0	£0.0	£0.0	£0.2	£26.6	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£28.3
Co-op, Mortimer Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4
Local Shops	£0.0	£0.1	£0.0	£0.1	£7.8	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.4
Herne Bay (Out-of-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.4**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.4**
Co-op, 98 Sea Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
Co-op, Reculver Road, Herne Bay	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Whitstable (In-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.2**	**£11.9**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£12.2**
Co-op, 14-16 Canterbury Road, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
Co-op, 58-60 Oxford Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Iceland, 34-36 High Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Local shops, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.2	£7.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.7
Whitstable (Out-of-Centre)	**£0.0**	**£3.5**	**£0.0**	**£0.2**	**£21.6**	**£44.7**	**£3.0**	**£0.0**	**£0.0**	**£0.0**	**£3.2**	**£0.0**	**£0.0**	**£0.0**	**£76.1**
Sainsbury's, Reeves Way, Whitstable	£0.0	£0.4	£0.0	£0.1	£13.9	£19.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£34.5
Tesco, 141 Tankerton Road, Whitstable	£0.0	£0.5	£0.0	£0.0	£1.2	£5.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.8
Tesco, Whitstable EXTRA, Whitstable	£0.0	£2.5	£0.0	£0.1	£6.5	£20.6	£1.9	£0.0	£0.0	£0.0	£3.2	£0.0	£0.0	£0.0	£34.9
Sturry (In-Centre)	**£0.0**	**£0.0**	**£0.1**	**£2.0**	**£0.0**	**£0.0**	**£0.6**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.7**
Co-op, High Street, Sturry	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Local shops, Sturry	£0.0	£0.0	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Other Destinations in Administrative Jurisdiction															
Local shops, Blean	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Local shops, Littlebourne	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Local shops, Bridge	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Destinations Beyond Administrative Jurisdiction															
Tesco, Dover EXTRA, Dover	£0.9	£0.0	£0.2	£0.0	£0.0	£0.0	£9.9	£1.6	£26.4	£1.4	£0.0	£0.0	£0.0	£0.0	£40.5
Morrisons, Bridge Street, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£23.8	£0.0	£0.0	£0.0	£0.0	£0.0	£23.8
Morrisons, Cheriton Rd, Folkestone	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£24.4	£0.0	£0.0	£1.2	£0.0	£25.6
Sainsbury's, West Street, Deal	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£21.1	£0.0	£0.0	£0.0	£0.0	£0.0	£22.2
Other	£1.8	£2.8	£2.3	£1.1	£2.4	£1.9	£261.8	£18.6	£115.6	£156.4	£285.5	£169.0	£146.5	£703.1	£1,869.0
Internet - Home Delivery	**£5.0**	**£0.3**	**£2.1**	**£1.0**	**£5.5**	**£2.0**	**£28.6**	**£5.3**	**£15.2**	**£11.3**	**£30.2**	**£6.8**	**£19.3**	**£70.6**	**£203.4**
Asda	£2.8	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£7.2	£0.0	£8.2	£2.9	£0.0	£22.1	£43.7
Morrisons	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Iceland	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Sainsbury’s	£0.9	£0.0	£0.1	£0.0	£1.9	£0.6	£1.4	£0.3	£0.0	£0.0	£7.7	£0.0	£4.5	£8.7	£26.1
Tesco	£0.4	£0.3	£1.1	£0.3	£2.4	£0.9	£23.9	£3.6	£8.0	£11.3	£14.3	£3.9	£13.0	£39.8	£123.5
Ocado	£0.9	£0.0	£0.6	£0.4	£0.4	£0.6	£3.3	£1.4	£0.0	£0.0	£0.0	£0.0	£1.8	£0.0	£9.3

Source: Tables 3 and 4

TABLE 9: TURNOVER (combined convenience exenditure) - 2025

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**£16.6**	**£2.6**	**£1.2**	**£1.1**	**£0.0**	**£1.1**	**£0.7**	**£0.6**	**£0.0**	**£0.8**	**£0.8**	**£1.2**	**£0.0**	**£0.0**	**£26.7**
M&S, St Georges Street	£6.7	£1.1	£0.6	£0.7	£0.0	£0.7	£0.0	£0.5	£0.0	£0.8	£0.0	£0.4	£0.0	£0.0	£11.4
Tesco Metro, Whitefriars Shopping Centre	£5.2	£0.5	£0.5	£0.3	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.7
Local shops	£4.7	£0.9	£0.1	£0.2	£0.0	£0.4	£0.7	£0.0	£0.0	£0.0	£0.8	£0.8	£0.0	£0.0	£8.6
Canterbury (Edge-of-Centre)	**£13.6**	**£1.6**	**£3.3**	**£1.9**	**£0.8**	**£2.1**	**£0.0**	**£2.2**	**£0.0**	**£0.8**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£26.3**
Waitrose, St. Georges Place	£12.5	£1.6	£3.3	£1.9	£0.8	£2.1	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£24.4
Sainsbury's, St Dunstans Street	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£1.9
Canterbury (Out-of-Centre)	**£64.1**	**£25.2**	**£12.6**	**£14.1**	**£15.6**	**£11.9**	**£3.8**	**£7.4**	**£19.4**	**£1.5**	**£6.5**	**£3.8**	**£0.6**	**£0.0**	**£186.5**
Asda, Sturry Road	£14.7	£0.9	£1.4	£9.1	£8.0	£6.3	£0.0	£2.8	£5.0	£0.0	£0.0	£0.0	£0.0	£0.0	£48.3
Lidl, Sturry Road	£0.5	£0.0	£1.2	£1.5	£0.8	£0.6	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.1
Morrisons, Perch Road	£21.3	£12.4	£5.3	£0.6	£2.5	£0.0	£0.0	£2.5	£13.3	£0.0	£3.2	£2.6	£0.0	£0.0	£63.6
Iceland, Maynard Road	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Sainsbury's, Kingsmead Road	£17.5	£7.0	£3.7	£2.8	£0.3	£1.2	£2.3	£0.8	£1.2	£1.5	£0.0	£1.2	£0.0	£0.0	£39.4
Aldi, St Andrews Close	£6.8	£4.9	£0.6	£0.2	£3.9	£3.7	£0.0	£1.4	£0.0	£0.0	£3.3	£0.0	£0.6	£0.0	£25.5
The Goods Shed, Station Road West	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Other out-of-centre	£1.9	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Herne Bay (In-Centre)	**£0.0**	**£0.2**	**£0.0**	**£0.3**	**£38.2**	**£1.9**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£40.6**
Morrisons, Beach Street, Herne Bay	£0.0	£0.0	£0.0	£0.2	£28.4	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£30.1
Co-op, Mortimer Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5
Local Shops	£0.0	£0.2	£0.0	£0.1	£8.3	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.0
Herne Bay (Out-of-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.5**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.5**
Co-op, 98 Sea Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0
Co-op, Reculver Road, Herne Bay	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Whitstable (In-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.3**	**£12.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£13.0**
Co-op, 14-16 Canterbury Road, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9
Co-op, 58-60 Oxford Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Iceland, 34-36 High Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Local shops, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.3	£8.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.3
Whitstable (Out-of-Centre)	**£0.0**	**£3.7**	**£0.0**	**£0.2**	**£23.0**	**£47.6**	**£3.2**	**£0.0**	**£0.0**	**£0.0**	**£3.5**	**£0.0**	**£0.0**	**£0.0**	**£81.2**
Sainsbury's, Reeves Way, Whitstable	£0.0	£0.4	£0.0	£0.1	£14.8	£20.2	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£36.8
Tesco, 141 Tankerton Road, Whitstable	£0.0	£0.6	£0.0	£0.0	£1.2	£5.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.2
Tesco, Whitstable EXTRA, Whitstable	£0.0	£2.7	£0.0	£0.1	£7.0	£22.0	£2.0	£0.0	£0.0	£0.0	£3.5	£0.0	£0.0	£0.0	£37.3
Sturry (In-Centre)	**£0.0**	**£0.0**	**£0.1**	**£2.1**	**£0.0**	**£0.0**	**£0.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.9**
Co-op, High Street, Sturry	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Local shops, Sturry	£0.0	£0.0	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Other Destinations in Administrative Jurisdiction															
Local shops, Blean	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Local shops, Littlebourne	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Local shops, Bridge	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Destinations Beyond Administrative Jurisdiction															
Tesco, Dover EXTRA, Dover	£0.9	£0.0	£0.2	£0.0	£0.0	£0.0	£10.7	£1.7	£27.8	£1.5	£0.0	£0.0	£0.0	£0.0	£42.9
Morrisons, Bridge Street, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£25.2	£0.0	£0.0	£0.0	£0.0	£0.0	£25.2
Morrisons, Cheriton Rd, Folkestone	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£25.8	£0.0	£0.0	£1.3	£0.0	£27.2
Sainsbury's, West Street, Deal	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£22.3	£0.0	£0.0	£0.0	£0.0	£0.0	£23.4
Other	£2.0	£3.0	£2.4	£1.1	£2.6	£2.1	£280.7	£19.7	£122.0	£165.6	£311.6	£183.9	£158.0	£760.2	£2,015.0
Internet - Home Delivery	**£5.3**	**£0.4**	**£2.2**	**£1.1**	**£5.9**	**£2.2**	**£30.7**	**£5.6**	**£16.0**	**£12.0**	**£33.0**	**£7.4**	**£20.8**	**£76.4**	**£218.9**
Asda	£3.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£7.5	£0.0	£8.9	£3.2	£0.0	£23.9	£47.1
Morrisons	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Iceland	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Sainsbury’s	£0.9	£0.0	£0.1	£0.0	£2.1	£0.6	£1.5	£0.3	£0.0	£0.0	£8.4	£0.0	£4.9	£9.4	£28.2
Tesco	£0.5	£0.4	£1.2	£0.3	£2.6	£0.9	£25.6	£3.8	£8.5	£12.0	£15.6	£4.3	£14.1	£43.0	£132.8
Ocado	£0.9	£0.0	£0.6	£0.4	£0.4	£0.6	£3.6	£1.4	£0.0	£0.0	£0.0	£0.0	£1.9	£0.0	£9.9

Source: Tables 3 and 4

TABLE 10: TURNOVER (combined convenience exenditure) - 2031

Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury (In-Centre)	**£17.9**	**£2.8**	**£1.3**	**£1.2**	**£0.0**	**£1.2**	**£0.7**	**£0.7**	**£0.0**	**£0.8**	**£0.8**	**£1.3**	**£0.0**	**£0.0**	**£28.8**
M&S, St Georges Street	£7.2	£1.2	£0.6	£0.7	£0.0	£0.7	£0.0	£0.5	£0.0	£0.8	£0.0	£0.4	£0.0	£0.0	£12.3
Tesco Metro, Whitefriars Shopping Centre	£5.7	£0.6	£0.5	£0.3	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.2
Local shops	£5.0	£1.0	£0.1	£0.2	£0.0	£0.5	£0.7	£0.0	£0.0	£0.0	£0.8	£0.9	£0.0	£0.0	£9.3
Canterbury (Edge-of-Centre)	**£14.7**	**£1.8**	**£3.5**	**£2.0**	**£0.9**	**£2.3**	**£0.0**	**£2.4**	**£0.0**	**£0.8**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£28.4**
Waitrose, St. Georges Place	£13.5	£1.8	£3.5	£2.0	£0.9	£2.3	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.3
Sainsbury's, St Dunstans Street	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£2.0
Canterbury (Out-of-Centre)	**£69.2**	**£27.7**	**£13.6**	**£15.2**	**£16.8**	**£12.8**	**£4.1**	**£7.9**	**£20.6**	**£1.6**	**£7.1**	**£4.2**	**£0.6**	**£0.0**	**£201.2**
Asda, Sturry Road	£15.9	£1.0	£1.6	£9.8	£8.7	£6.8	£0.0	£3.0	£5.2	£0.0	£0.0	£0.0	£0.0	£0.0	£52.0
Lidl, Sturry Road	£0.5	£0.0	£1.3	£1.6	£0.9	£0.7	£1.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£6.6
Morrisons, Perch Road	£23.0	£13.6	£5.7	£0.6	£2.7	£0.0	£0.0	£2.6	£14.1	£0.0	£3.5	£2.8	£0.0	£0.0	£68.5
Iceland, Maynard Road	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
Sainsbury's, Kingsmead Road	£18.9	£7.7	£4.0	£3.0	£0.3	£1.3	£2.4	£0.8	£1.2	£1.6	£0.0	£1.3	£0.0	£0.0	£42.6
Aldi, St Andrews Close	£7.4	£5.4	£0.7	£0.2	£4.2	£4.0	£0.0	£1.5	£0.0	£0.0	£3.6	£0.0	£0.6	£0.0	£27.6
The Goods Shed, Station Road West	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Other out-of-centre	£2.1	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.5
Herne Bay (In-Centre)	**£0.0**	**£0.2**	**£0.0**	**£0.3**	**£41.2**	**£2.1**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£43.8**
Morrisons, Beach Street, Herne Bay	£0.0	£0.0	£0.0	£0.2	£30.6	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£32.5
Co-op, Mortimer Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6
Local Shops	£0.0	£0.2	£0.0	£0.1	£9.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£9.7
Herne Bay (Out-of-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£2.7**
Co-op, 98 Sea Street, Herne Bay	£0.0	£0.0	£0.0	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
Co-op, Reculver Road, Herne Bay	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Whitstable (In-Centre)	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.3**	**£13.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£14.0**
Co-op, 14-16 Canterbury Road, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.1
Co-op, 58-60 Oxford Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6
Iceland, 34-36 High Street, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.4
Local shops, Whitstable	£0.0	£0.0	£0.0	£0.0	£0.3	£8.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£8.9
Whitstable (Out-of-Centre)	**£0.0**	**£4.1**	**£0.0**	**£0.2**	**£24.8**	**£51.3**	**£3.4**	**£0.0**	**£0.0**	**£0.0**	**£3.8**	**£0.0**	**£0.0**	**£0.0**	**£87.6**
Sainsbury's, Reeves Way, Whitstable	£0.0	£0.5	£0.0	£0.1	£16.0	£21.8	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£39.6
Tesco, 141 Tankerton Road, Whitstable	£0.0	£0.6	£0.0	£0.0	£1.3	£5.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.8
Tesco, Whitstable EXTRA, Whitstable	£0.0	£3.0	£0.0	£0.1	£7.5	£23.7	£2.2	£0.0	£0.0	£0.0	£3.8	£0.0	£0.0	£0.0	£40.2
Sturry (In-Centre)	**£0.0**	**£0.0**	**£0.1**	**£2.2**	**£0.0**	**£0.0**	**£0.7**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£0.0**	**£3.1**
Co-op, High Street, Sturry	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.3
Local shops, Sturry	£0.0	£0.0	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8
Other Destinations in Administrative Jurisdiction															
Local shops, Blean	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0
Local shops, Littlebourne	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Local shops, Bridge	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7
Destinations Beyond Administrative Jurisdiction															
Tesco, Dover EXTRA, Dover	£1.0	£0.0	£0.3	£0.0	£0.0	£0.0	£11.5	£1.8	£29.5	£1.6	£0.0	£0.0	£0.0	£0.0	£45.6
Morrisons, Bridge Street, Dover	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£26.6	£0.0	£0.0	£0.0	£0.0	£0.0	£26.6
Morrisons, Cheriton Rd, Folkestone	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£27.5	£0.0	£0.0	£1.4	£0.0	£29.0
Sainsbury's, West Street, Deal	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£23.6	£0.0	£0.0	£0.0	£0.0	£0.0	£24.8
Other	£2.1	£3.3	£2.6	£1.2	£2.8	£2.2	£302.0	£20.8	£129.2	£176.8	£339.6	£199.8	£170.6	£823.0	£2,176.0
Internet - Home Delivery	**£5.8**	**£0.4**	**£2.4**	**£1.1**	**£6.3**	**£2.3**	**£33.0**	**£5.9**	**£17.0**	**£12.8**	**£35.9**	**£8.1**	**£22.5**	**£82.7**	**£236.2**
Asda	£3.3	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£8.0	£0.0	£9.7	£3.4	£0.0	£25.9	£50.9
Morrisons	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
Iceland	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9
Sainsbury’s	£1.0	£0.0	£0.1	£0.0	£2.2	£0.7	£1.7	£0.3	£0.0	£0.0	£9.2	£0.0	£5.2	£10.2	£30.6
Tesco	£0.5	£0.4	£1.3	£0.3	£2.8	£1.0	£27.5	£4.1	£9.0	£12.8	£17.0	£4.7	£15.2	£46.6	£143.2
Ocado	£1.0	£0.0	£0.7	£0.4	£0.5	£0.7	£3.8	£1.5	£0.0	£0.0	£0.0	£0.0	£2.1	£0.0	£10.7

Source: Tables 3 and 4

TABLE 11: COMMITMENTS AND PIPELINE DEVELOPMENT

Development	[A] Gross Floorspace (sqm gross)	[B] Net Sales Area (sqm net)	[C] Net Convenience Factor (%)	[D] Net Convenience Floorspace (sqm net)	[E] Turnover 2015 (£M)	[F] Turnover 2020 (£M)	[G] Turnover 2025 (£M)	[H] Turnover 2031 (£M)
Sainsbury's, Altira Park, Herne Bay	9,258	5,575	65.0%	3,624	£43.77	£43.25	£43.34	£43.60
Aldi, Kings Road, Herne Bay	1,665	-	-	1,140	£10.12	£9.99	£10.01	£10.07
Total Commitments	10,923	-	-	4,764	£53.89	£53.25	£53.35	£53.67

Source:

[A - D] = Application documentation

[E - H] = [D] X Co. average sales density, derived from Verdict, and Mintel - applying efficiency rates and converted to 2013 prices

TABLE 12: FUTURE CONVENIENCE FLOORSPACE CAPACITY

		2015	2020	2025	2031
[A]	**Total Available Convenience Expenditure in Survey Area** (£Ms)	£2,355.2	£2,542.5	£2,734.3	£2,950.0
[B]	**Convenience Turnover of Destinations in Canterbury District** (from survey area) (constant market shares) (£Ms)	£328.6	£354.71	£381.47	£411.55
[C]	**Market Share** (%)	14%	14%	14%	14%
[D]	**Inflow of Expenditure** (£Ms)	£2.3	£2.5	£2.6	£2.9
[E]	**Total Convenience Turnover of Destinations in Canterbury District** (constant market shares) (£Ms)	£330.9	£357.2	£384.1	£414.4
[F]	**Benchmark Turnover** (grown by efficiency rate) (£Ms)	£330.9	£326.9	£327.6	£329.6
[G]	**Turnover of Commitments** (grown by efficiency rate) (£Ms)	£53.9	£53.2	£53.4	£53.7
[H]	**Residual Expenditure** (£Ms)	-£53.9	-£23.0	£3.2	£31.2
[I]	**Benchmark Sales Density** (£/sqm)	£12,000	£11,857	£11,880	£11,952
[J]	**Floorspace Capacity** (sqm net)	**-4,491**	**-1,940**	**266**	**2,608**

Source:

[A] = Table 3

[B] = Tables 5, 8, 9 and 10

[C] = Table 4

[D] = Inflow rate of 5% applied to Canterbury's Turnover in Tables 5, 8, 9 and 10

[E] = [B] + [D]

[F] = Assumed equilibrium at base year, applying efficiency rates derived from Experian Retail Planner Briefing Note 12.1 Addendum (Oct 2014)

[G] = Table 11

[H] = [E] - ([F] + [G])

[I] = Sales density of new floorsacpe based on large store format at 2015 and applying efficiency rates derived from Experian Retail Planner Briefing Note 12.1 Addendum (Oct 2014)

[J] = [H] / [I]

Annex E

Comparison Floorspace Capacity Modelling Tables

Canterbury City Council
Retail and Leisure Study - 2015
Comparison Capacity Assessment

20/05/2015

TABLE 1: POPULATION FORECASTS

Survey Area	2015	2020	2025	2031	Increase 2015 - 2031	Growth 2015 - 2031
Zone 1	49,625	51,545	53,340	55,564	5,939	12%
Zone 2	15,460	15,905	16,487	17,447	1,987	13%
Zone 3	8,559	8,892	9,187	9,558	999	12%
Zone 4	9,460	9,832	10,154	10,545	1,085	11%
Zone 5	40,460	42,074	43,513	45,246	4,786	12%
Zone 6	34,485	35,877	37,094	38,540	4,055	12%
Zone 7	139,005	144,965	150,870	156,570	17,565	13%
Zone 8	14,213	14,558	14,913	15,244	1,031	7%
Zone 9	98,952	101,346	103,810	106,008	7,056	7%
Zone 10	87,341	89,492	92,007	94,719	7,378	8%
Zone 11	143,492	153,148	162,212	170,548	27,056	19%
Zone 12	81,426	86,735	91,588	95,989	14,563	18%
Zone 13	66,391	69,738	73,001	76,014	9,623	14%
Zone 14	346,175	365,244	383,290	400,308	54,133	16%
Population	**1,135,044**	**1,189,351**	**1,241,466**	**1,292,300**	**157,256**	**14%**

Source:

Experian Population Forecasts Micromarketer May 2015

TABLE 2: PER CAPITA COMPARISON GOODS EXPENDITURE (£) **2013 Price base**

Survey Area	2015	2020	2025	2031
Zone 1	£3,099	£3,645	£4,288	£5,210
Zone 2	£3,681	£4,330	£5,093	£6,189
Zone 3	£4,501	£5,295	£6,228	£7,567
Zone 4	£3,420	£4,023	£4,732	£5,749
Zone 5	£3,162	£3,719	£4,375	£5,316
Zone 6	£3,522	£4,143	£4,873	£5,922
Zone 7	£3,297	£3,879	£4,562	£5,544
Zone 8	£4,242	£4,990	£5,870	£7,132
Zone 9	£3,409	£4,010	£4,716	£5,731
Zone 10	£3,606	£4,242	£4,989	£6,062
Zone 11	£3,409	£4,010	£4,716	£5,731
Zone 12	£3,451	£4,059	£4,774	£5,801
Zone 13	£2,227	£2,619	£3,081	£3,744
Zone 14	£4,077	£4,795	£5,641	£6,854

Source:

Comparison expenditure growth rate derived from Experian Retail Planner Briefing Note 12 (October 2014), Figure 1a

Notes:

Spend per capita figures in 2013 price base

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£Ms) **2013 Price base**

Survey Area	2015	2020	2025	2031	Increase 2015-2031 (£M)	Growth 2015-2031 (%)
Zone 1	£153.8	£187.9	£228.7	£289.5	£135.7	88%
Zone 2	£56.9	£68.9	£84.0	£108.0	£51.1	90%
Zone 3	£38.5	£47.1	£57.2	£72.3	£33.8	88%
Zone 4	£32.4	£39.6	£48.0	£60.6	£28.3	87%
Zone 5	£127.9	£156.5	£190.4	£240.5	£112.6	88%
Zone 6	£121.5	£148.6	£180.8	£228.2	£106.8	88%
Zone 7	£458.4	£562.3	£688.3	£867.9	£409.6	89%
Zone 8	£60.3	£72.6	£87.5	£108.7	£48.4	80%
Zone 9	£337.3	£406.4	£489.6	£607.5	£270.2	80%
Zone 10	£315.0	£379.6	£459.1	£574.2	£259.3	82%
Zone 11	£489.1	£614.1	£765.1	£977.4	£488.2	100%
Zone 12	£281.0	£352.1	£437.3	£556.8	£275.9	98%
Zone 13	£147.9	£182.7	£224.9	£284.6	£136.7	92%
Zone 14	£1,411.3	£1,751.5	£2,162.0	£2,743.7	£1,332.3	94%
TOTAL	**£4,031.2**	**£4,969.7**	**£6,102.9**	**£7,720.0**	**£3,688.8**	**92%**

Source:

Tables 1 & 2

TABLE 4: SPEND WEIGHTING BY ZONE AND GOODS CATEGORY

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	1.0%	0.4%	0.3%	0.2%	0.8%	0.8%	3.0%	0.4%	2.2%	2.1%	3.2%	1.9%	1.0%	9.3%	**26.6%**
Furniture and floor coverings, and large household appliances	0.5%	0.2%	0.1%	0.1%	0.4%	0.4%	1.5%	0.2%	1.1%	1.0%	1.6%	0.9%	0.5%	4.6%	**13.1%**
Household textiles, soft furnishings, china and glassware	0.2%	0.1%	0.1%	0.0%	0.2%	0.2%	0.6%	0.1%	0.4%	0.4%	0.7%	0.4%	0.2%	1.9%	**5.4%**
Small domestic appliances, audio/visual and photographic/electronic equipment	0.9%	0.3%	0.2%	0.2%	0.7%	0.7%	2.5%	0.3%	1.9%	1.7%	2.7%	1.6%	0.8%	7.8%	**22.4%**
Books, CDs, DVDs and stationery	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.4%	0.1%	0.3%	0.3%	0.4%	0.3%	0.1%	1.3%	**3.7%**
DIY, hardware, tools, gardening and decorator supplies	0.2%	0.1%	0.0%	0.0%	0.1%	0.1%	0.5%	0.1%	0.4%	0.3%	0.5%	0.3%	0.2%	1.5%	**4.3%**
Chemist goods	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.3%	0.0%	0.2%	0.2%	0.4%	0.2%	0.1%	1.0%	**3.0%**
Jewellery, silverware and watches	0.2%	0.1%	0.1%	0.0%	0.2%	0.2%	0.7%	0.1%	0.5%	0.5%	0.7%	0.4%	0.2%	2.0%	**5.8%**
Sporting goods, bicycles, games, toys and camping equipment	0.6%	0.2%	0.2%	0.1%	0.5%	0.5%	1.8%	0.2%	1.3%	1.2%	1.9%	1.1%	0.6%	5.5%	**15.8%**
Combined	**3.8%**	**1.4%**	**1.0%**	**0.8%**	**3.2%**	**3.0%**	**11.4%**	**1.5%**	**8.4%**	**7.8%**	**12.1%**	**7.0%**	**3.7%**	**35.0%**	**100.0%**

Source:

Experian Micromarketer Expenditure Report, May 2015

TABLE 5: MARKET SHARE / TURNOVER 2015 / TRADE DRAW
CANTERBURY CITY CENTRE

Market Shares	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	81.2%	81.2%	58.8%	78.4%	48.8%	63.7%	9.0%	42.9%	42.0%	31.1%	25.8%	17.5%	10.2%	2.0%	**21.9%**
Furniture and floor coverings, and large household appliances	37.5%	41.5%	31.8%	32.1%	32.9%	28.8%	10.8%	27.7%	29.0%	8.8%	6.8%	11.4%	1.8%	1.8%	**11.6%**
Household textiles, soft furnishings, china and glassware	53.2%	49.8%	46.7%	50.6%	36.5%	42.4%	11.4%	32.7%	28.2%	14.8%	19.3%	11.0%	5.9%	0.8%	**14.9%**
Small domestic appliances, audio/visual and photographic/electronic equipment	43.3%	24.1%	43.6%	28.8%	23.3%	31.6%	1.6%	17.1%	18.3%	6.2%	9.4%	5.4%	0.0%	0.0%	**8.3%**
Books, CDs, DVDs and stationery	54.8%	55.1%	48.8%	58.3%	32.9%	33.4%	0.5%	34.2%	10.9%	6.2%	9.3%	0.9%	1.1%	0.0%	**9.1%**
DIY, hardware, tools, gardening and decorator supplies	51.9%	18.7%	43.1%	53.5%	8.5%	4.5%	0.8%	28.5%	11.0%	0.0%	11.0%	1.4%	0.0%	0.0%	**6.4%**
Chemist goods	84.1%	75.4%	42.0%	37.4%	4.5%	5.3%	0.6%	17.4%	8.9%	2.1%	3.0%	1.9%	0.5%	0.0%	**7.0%**
Jewellery, silverware and watches	76.7%	76.1%	71.0%	70.6%	55.6%	53.2%	15.9%	50.0%	30.5%	11.2%	21.7%	11.4%	11.7%	0.0%	**18.5%**
Sporting goods, bicycles, games, toys and camping equipment	67.6%	47.2%	48.5%	52.9%	39.0%	33.7%	3.9%	41.9%	20.8%	3.1%	19.0%	6.0%	1.5%	0.0%	**12.2%**
Combined	**60.9%**	**52.1%**	**48.8%**	**52.2%**	**35.6%**	**40.0%**	**6.4%**	**33.2%**	**26.8%**	**13.0%**	**16.1%**	**9.7%**	**4.2%**	**0.8%**	**13.8%**

Turnover 2015	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	£33.2	£12.3	£6.0	£6.7	£16.6	£20.6	£11.0	£6.9	£37.7	£26.1	£33.6	£13.1	£4.0	£7.4	**£235.2**
Furniture and floor coverings, and large household appliances	£7.6	£3.1	£1.6	£1.4	£5.5	£4.6	£6.5	£2.2	£12.8	£3.7	£4.4	£4.2	£0.3	£3.3	**£61.2**
Household textiles, soft furnishings, china and glassware	£4.4	£1.5	£1.0	£0.9	£2.5	£2.8	£2.8	£1.1	£5.1	£2.5	£5.1	£1.7	£0.5	£0.6	**£32.3**
Small domestic appliances, audio/visual and photographic/electronic equipment	£14.9	£3.1	£3.8	£2.1	£6.7	£8.6	£1.6	£2.3	£13.8	£4.4	£10.3	£3.4	£0.0	£0.0	**£74.8**
Books, CDs, DVDs and stationery	£3.1	£1.1	£0.7	£0.7	£1.5	£1.5	£0.1	£0.8	£1.3	£0.7	£1.7	£0.1	£0.1	£0.0	**£13.4**
DIY, hardware, tools, gardening and decorator supplies	£3.5	£0.5	£0.7	£0.7	£0.5	£0.2	£0.2	£0.7	£1.6	£0.0	£2.3	£0.2	£0.0	£0.0	**£11.1**
Chemist goods	£3.8	£1.3	£0.5	£0.4	£0.2	£0.2	£0.1	£0.3	£0.9	£0.2	£0.4	£0.2	£0.0	£0.0	**£8.4**
Jewellery, silverware and watches	£6.9	£2.5	£1.6	£1.3	£4.2	£3.8	£4.3	£1.8	£6.0	£2.1	£6.2	£1.9	£1.0	£0.0	**£43.5**
Sporting goods, bicycles, games, toys and camping equipment	£16.4	£4.2	£2.9	£2.7	£7.9	£6.5	£2.8	£4.0	£11.1	£1.5	£14.7	£2.6	£0.3	£0.0	**£77.6**
Combined	**£93.7**	**£29.6**	**£18.8**	**£16.9**	**£45.5**	**£48.6**	**£29.3**	**£20.0**	**£90.4**	**£41.1**	**£78.6**	**£27.3**	**£6.3**	**£11.3**	**£557.3**

Trade Draw Pattern	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	6%	2%	1%	1%	3%	4%	2%	1%	7%	5%	6%	2%	1%	1%	**42%**
Furniture and floor coverings, and large household appliances	1%	1%	0%	0%	1%	1%	1%	0%	2%	1%	1%	1%	0%	1%	**11%**
Household textiles, soft furnishings, china and glassware	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%	1%	0%	0%	0%	**6%**
Small domestic appliances, audio/visual and photographic/electronic equipment	3%	1%	1%	0%	1%	2%	0%	0%	2%	1%	2%	1%	0%	0%	**13%**
Books, CDs, DVDs and stationery	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**2%**
DIY, hardware, tools, gardening and decorator supplies	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**2%**
Chemist goods	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**2%**
Jewellery, silverware and watches	1%	0%	0%	0%	1%	1%	1%	0%	1%	0%	1%	0%	0%	0%	**8%**
Sporting goods, bicycles, games, toys and camping equipment	3%	1%	1%	0%	1%	1%	1%	1%	2%	0%	3%	0%	0%	0%	**14%**
Combined	**17%**	**5%**	**3%**	**3%**	**8%**	**9%**	**5%**	**4%**	**16%**	**7%**	**14%**	**5%**	**1%**	**2%**	**100%**

Source: Household Telephone Survey Results and Table 3

TABLE 6: MARKET SHARE / TURNOVER 2015 / TRADE DRAW
STURRY ROAD OUT-OF-CENTRE RETAIL (COMBINED)

Market Shares	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	0.9%	3.7%	1.4%	3.3%	5.7%	2.3%	0.0%	2.9%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	**0.5%**
Furniture and floor coverings, and large household appliances	18.4%	18.6%	20.4%	16.5%	21.3%	16.2%	1.0%	9.9%	0.7%	2.0%	2.5%	5.7%	0.0%	0.0%	**3.6%**
Household textiles, soft furnishings, china and glassware	6.0%	8.1%	17.3%	14.5%	18.5%	15.1%	0.7%	4.5%	0.7%	1.6%	3.7%	0.7%	0.7%	0.0%	**2.5%**
Small domestic appliances, audio/visual and photographic/electronic equipment	29.7%	47.4%	20.6%	40.4%	30.7%	20.6%	0.0%	18.9%	0.0%	2.6%	6.9%	0.0%	0.0%	0.0%	**5.2%**
Books, CDs, DVDs and stationery	0.0%	0.9%	1.0%	1.1%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
DIY, hardware, tools, gardening and decorator supplies	21.0%	34.1%	24.9%	30.0%	8.1%	0.9%	0.0%	4.0%	0.0%	0.0%	5.8%	0.9%	0.0%	0.0%	**2.9%**
Chemist goods	0.0%	0.0%	0.9%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Jewellery, silverware and watches	1.3%	0.0%	2.7%	1.4%	1.4%	1.5%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.2%**
Sporting goods, bicycles, games, toys and camping equipment	11.8%	19.6%	20.1%	29.9%	2.6%	18.5%	0.0%	4.1%	0.9%	1.4%	3.8%	0.0%	0.0%	0.0%	**2.5%**
Combined	**12.5%**	**19.0%**	**13.0%**	**19.0%**	**13.1%**	**11.2%**	**0.2%**	**7.4%**	**0.3%**	**1.1%**	**2.9%**	**1.0%**	**0.0%**	**0.0%**	**2.4%**

Turnover 2015	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	£0.4	£0.6	£0.1	£0.3	£1.9	£0.7	£0.0	£0.5	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	**£4.8**
Furniture and floor coverings, and large household appliances	£3.7	£1.4	£1.0	£0.7	£3.6	£2.6	£0.6	£0.8	£0.3	£0.8	£1.6	£2.1	£0.0	£0.0	**£19.3**
Household textiles, soft furnishings, china and glassware	£0.5	£0.2	£0.4	£0.3	£1.3	£1.0	£0.2	£0.1	£0.1	£0.3	£1.0	£0.1	£0.1	£0.0	**£5.5**
Small domestic appliances, audio/visual and photographic/electronic equipment	£10.2	£6.0	£1.8	£2.9	£8.8	£5.6	£0.0	£2.5	£0.0	£1.8	£7.6	£0.0	£0.0	£0.0	**£47.3**
Books, CDs, DVDs and stationery	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.1**
DIY, hardware, tools, gardening and decorator supplies	£1.4	£0.8	£0.4	£0.4	£0.4	£0.0	£0.0	£0.1	£0.0	£0.0	£1.2	£0.1	£0.0	£0.0	**£5.0**
Chemist goods	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Jewellery, silverware and watches	£0.1	£0.0	£0.1	£0.0	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.5**
Sporting goods, bicycles, games, toys and camping equipment	£2.9	£1.8	£1.2	£1.5	£0.5	£3.5	£0.0	£0.4	£0.5	£0.7	£2.9	£0.0	£0.0	£0.0	**£15.9**
Combined	**£19.2**	**£10.8**	**£5.0**	**£6.1**	**£16.7**	**£13.6**	**£0.8**	**£4.5**	**£0.9**	**£3.6**	**£14.3**	**£2.7**	**£0.1**	**£0.0**	**£98.4**

Trade Draw Pattern	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	0%	1%	0%	0%	2%	1%	0%	0%	0%	0%	0%	0%	0%	0%	**5%**
Furniture and floor coverings, and large household appliances	4%	1%	1%	1%	4%	3%	1%	1%	0%	1%	2%	2%	0%	0%	**20%**
Household textiles, soft furnishings, china and glassware	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	**6%**
Small domestic appliances, audio/visual and photographic/electronic equipment	10%	6%	2%	3%	9%	6%	0%	3%	0%	2%	8%	0%	0%	0%	**48%**
Books, CDs, DVDs and stationery	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
DIY, hardware, tools, gardening and decorator supplies	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	**5%**
Chemist goods	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Jewellery, silverware and watches	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Sporting goods, bicycles, games, toys and camping equipment	3%	2%	1%	2%	1%	4%	0%	0%	0%	1%	3%	0%	0%	0%	**16%**
Combined	**19%**	**11%**	**5%**	**6%**	**17%**	**14%**	**1%**	**5%**	**1%**	**4%**	**15%**	**3%**	**0%**	**0%**	**100%**

Source: Household Telephone Survey Results and Table 3

TABLE 7: MARKET SHARE / TURNOVER 2015 / TRADE DRAW
WINCHEAP OUT-OF-CENTRE RETAIL (COMBINED)

Market Shares	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Furniture and floor coverings, and large household appliances	22.7%	11.4%	4.9%	15.1%	1.7%	2.0%	0.0%	6.2%	0.5%	0.0%	4.5%	0.0%	0.0%	0.0%	**2.0%**
Household textiles, soft furnishings, china and glassware	20.6%	24.0%	12.2%	19.3%	4.0%	5.7%	0.0%	2.3%	3.0%	5.3%	0.0%	0.0%	0.0%	0.8%	**2.7%**
Small domestic appliances, audio/visual and photographic/electronic equipment	6.3%	11.9%	5.5%	4.9%	0.0%	0.0%	0.0%	0.6%	0.0%	1.9%	3.7%	1.4%	0.0%	0.0%	**1.2%**
Books, CDs, DVDs and stationery	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.3%**
DIY, hardware, tools, gardening and decorator supplies	21.9%	33.7%	16.8%	2.2%	0.9%	0.0%	0.0%	2.4%	1.8%	0.0%	0.0%	0.0%	0.5%	0.0%	**1.7%**
Chemist goods	11.9%	15.9%	19.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.6%	0.0%	0.0%	0.0%	**1.0%**
Jewellery, silverware and watches	0.0%	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	**0.2%**
Sporting goods, bicycles, games, toys and camping equipment	4.8%	6.0%	1.1%	2.9%	0.0%	0.0%	5.7%	2.7%	0.0%	0.0%	1.7%	0.0%	0.0%	0.8%	**1.5%**
Combined	**7.6%**	**8.3%**	**4.6%**	**4.7%**	**0.5%**	**0.6%**	**0.9%**	**1.6%**	**0.5%**	**0.7%**	**1.8%**	**0.3%**	**0.0%**	**0.2%**	**1.0%**

Turnover 2015	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.0**
Furniture and floor coverings, and large household appliances	£4.6	£0.9	£0.2	£0.6	£0.3	£0.3	£0.0	£0.5	£0.2	£0.0	£2.9	£0.0	£0.0	£0.0	**£10.5**
Household textiles, soft furnishings, china and glassware	£1.7	£0.7	£0.3	£0.3	£0.3	£0.4	£0.0	£0.1	£0.5	£0.9	£0.0	£0.0	£0.0	£0.6	**£5.8**
Small domestic appliances, audio/visual and photographic/electronic equipment	£2.2	£1.5	£0.5	£0.4	£0.0	£0.0	£0.0	£0.1	£0.0	£1.3	£4.1	£0.9	£0.0	£0.0	**£10.9**
Books, CDs, DVDs and stationery	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	**£0.5**
DIY, hardware, tools, gardening and decorator supplies	£1.5	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	**£3.0**
Chemist goods	£0.5	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	**£1.2**
Jewellery, silverware and watches	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	**£0.5**
Sporting goods, bicycles, games, toys and camping equipment	£1.2	£0.5	£0.1	£0.1	£0.0	£0.0	£4.1	£0.3	£0.0	£0.0	£1.3	£0.0	£0.0	£1.9	**£9.5**
Combined	**£11.6**	**£4.7**	**£1.8**	**£1.5**	**£0.6**	**£0.7**	**£4.1**	**£1.0**	**£1.6**	**£2.2**	**£8.7**	**£0.9**	**£0.0**	**£2.4**	**£41.9**

Trade Draw Pattern	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Furniture and floor coverings, and large household appliances	11%	2%	1%	2%	1%	1%	0%	1%	1%	0%	7%	0%	0%	0%	**25%**
Household textiles, soft furnishings, china and glassware	4%	2%	1%	1%	1%	1%	0%	0%	1%	2%	0%	0%	0%	1%	**14%**
Small domestic appliances, audio/visual and photographic/electronic equipment	5%	4%	1%	1%	0%	0%	0%	0%	0%	3%	10%	2%	0%	0%	**26%**
Books, CDs, DVDs and stationery	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	**1%**
DIY, hardware, tools, gardening and decorator supplies	3%	2%	1%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	**7%**
Chemist goods	1%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**3%**
Jewellery, silverware and watches	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	**1%**
Sporting goods, bicycles, games, toys and camping equipment	3%	1%	0%	0%	0%	0%	10%	1%	0%	0%	3%	0%	0%	4%	**23%**
Combined	**28%**	**11%**	**4%**	**4%**	**1%**	**2%**	**10%**	**2%**	**4%**	**5%**	**21%**	**2%**	**0%**	**6%**	**100%**

Source: Household Telephone Survey Results & Table 3

TABLE 8: MARKET SHARE / TURNOVER 2015 / TRADE DRAW
SFT TOTAL

Market Shares	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	9.7%	7.3%	16.9%	5.7%	8.5%	6.5%	14.4%	3.6%	17.0%	7.6%	13.6%	8.1%	14.3%	7.7%	**10.3%**
Furniture and floor coverings, and large household appliances	14.0%	25.6%	38.1%	18.2%	20.3%	21.7%	17.6%	14.3%	21.2%	22.5%	36.2%	34.5%	30.5%	18.8%	**23.0%**
Household textiles, soft furnishings, china and glassware	6.8%	7.2%	12.5%	6.3%	8.9%	13.7%	5.0%	6.6%	17.7%	20.7%	15.7%	17.5%	28.0%	6.0%	**11.2%**
Small domestic appliances, audio/visual and photographic/electronic equipment	17.2%	13.3%	19.4%	20.9%	17.7%	14.8%	20.3%	25.4%	26.8%	14.9%	19.1%	24.4%	36.7%	28.8%	**23.7%**
Books, CDs, DVDs and stationery	45.2%	41.5%	43.5%	32.8%	44.9%	36.7%	52.0%	39.1%	57.6%	65.4%	63.7%	51.9%	62.6%	60.1%	**56.6%**
DIY, hardware, tools, gardening and decorator supplies	1.7%	3.5%	0.0%	3.7%	0.0%	1.2%	2.7%	2.6%	0.0%	0.0%	0.6%	9.2%	5.9%	2.5%	**2.3%**
Chemist goods	0.0%	0.7%	1.3%	3.0%	0.0%	1.7%	6.6%	1.3%	0.5%	1.1%	3.5%	0.0%	0.0%	1.2%	**1.8%**
Jewellery, silverware and watches	16.0%	9.9%	3.2%	20.8%	15.7%	2.0%	18.6%	3.9%	14.6%	10.4%	16.5%	18.6%	22.6%	4.9%	**11.6%**
Sporting goods, bicycles, games, toys and camping equipment	11.5%	13.9%	25.8%	11.4%	10.8%	13.6%	22.1%	10.6%	30.4%	25.2%	33.1%	21.8%	38.7%	23.1%	**23.9%**
Combined	**13.1%**	**13.1%**	**20.4%**	**13.4%**	**13.6%**	**12.3%**	**17.7%**	**12.3%**	**22.0%**	**16.4%**	**22.1%**	**19.9%**	**27.5%**	**17.5%**	**18.3%**

Turnover 2015	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	£4.0	£1.1	£1.7	£0.5	£2.9	£2.1	£17.5	£0.6	£15.3	£6.4	£17.6	£6.1	£5.6	£29.1	**£110.4**
Furniture and floor coverings, and large household appliances	£2.8	£1.9	£1.9	£0.8	£3.4	£3.5	£10.6	£1.1	£9.4	£9.3	£23.3	£12.7	£5.9	£34.8	**£121.5**
Household textiles, soft furnishings, china and glassware	£0.6	£0.2	£0.3	£0.1	£0.6	£0.9	£1.2	£0.2	£3.2	£3.5	£4.1	£2.6	£2.2	£4.6	**£24.3**
Small domestic appliances, audio/visual and photographic/electronic equipment	£5.9	£1.7	£1.7	£1.5	£5.1	£4.0	£20.8	£3.4	£20.2	£10.5	£20.9	£15.3	£12.1	£90.8	**£214.0**
Books, CDs, DVDs and stationery	£2.5	£0.9	£0.6	£0.4	£2.1	£1.6	£8.7	£0.9	£7.1	£7.5	£11.4	£5.3	£3.4	£31.1	**£83.6**
DIY, hardware, tools, gardening and decorator supplies	£0.1	£0.1	£0.0	£0.1	£0.0	£0.1	£0.5	£0.1	£0.0	£0.0	£0.1	£1.1	£0.4	£1.5	**£4.1**
Chemist goods	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.9	£0.0	£0.0	£0.1	£0.5	£0.0	£0.0	£0.5	**£2.2**
Jewellery, silverware and watches	£1.4	£0.3	£0.1	£0.4	£1.2	£0.1	£5.0	£0.1	£2.9	£1.9	£4.7	£3.0	£2.0	£4.0	**£27.2**
Sporting goods, bicycles, games, toys and camping equipment	£2.8	£1.3	£1.6	£0.6	£2.2	£2.6	£15.9	£1.0	£16.2	£12.5	£25.5	£9.7	£9.0	£51.3	**£152.1**
Combined	**£20.1**	**£7.5**	**£7.9**	**£4.3**	**£17.4**	**£15.0**	**£81.2**	**£7.4**	**£74.3**	**£51.8**	**£108.3**	**£56.0**	**£40.6**	**£247.7**	**£739.5**

Trade Draw Pattern	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Clothing and footwear	1%	0%	0%	0%	0%	0%	2%	0%	2%	1%	2%	1%	1%	4%	**15%**
Furniture and floor coverings, and large household appliances	0%	0%	0%	0%	0%	0%	1%	0%	1%	1%	3%	2%	1%	5%	**16%**
Household textiles, soft furnishings, china and glassware	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	**3%**
Small domestic appliances, audio/visual and photographic/electronic equipment	1%	0%	0%	0%	1%	1%	3%	0%	3%	1%	3%	2%	2%	12%	**29%**
Books, CDs, DVDs and stationery	0%	0%	0%	0%	0%	0%	1%	0%	1%	1%	2%	1%	0%	4%	**11%**
DIY, hardware, tools, gardening and decorator supplies	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**1%**
Chemist goods	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Jewellery, silverware and watches	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	**4%**
Sporting goods, bicycles, games, toys and camping equipment	0%	0%	0%	0%	0%	0%	2%	0%	2%	2%	3%	1%	1%	7%	**21%**
Combined	**3%**	**1%**	**1%**	**1%**	**2%**	**2%**	**11%**	**1%**	**10%**	**7%**	**15%**	**8%**	**5%**	**33%**	**100%**

Source: Household Telephone Survey Results and Table 3

TABLE 9: CURRENT COMPOSITE MARKET SHARES (of available comparison expenditure from the survey area)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	60.9%	52.1%	48.8%	52.2%	35.6%	40.0%	6.4%	33.2%	26.8%	13.0%	16.1%	9.7%	4.2%	0.8%	**13.8%**
Sturry Road Out-of-Centre Retail (Combined)	12.5%	19.0%	13.0%	19.0%	13.1%	11.2%	0.2%	7.4%	0.3%	1.1%	2.9%	1.0%	0.0%	0.0%	**2.4%**
Wincheap Out-of-Centre Retail (Combined)	7.6%	8.3%	4.6%	4.7%	0.5%	0.6%	0.9%	1.6%	0.5%	0.7%	1.8%	0.3%	0.0%	0.2%	**1.0%**
Herne Bay	0.2%	0.3%	0.6%	1.9%	12.3%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.5%**
Whitstable	0.3%	1.3%	0.3%	0.1%	4.4%	25.7%	0.3%	0.1%	0.0%	0.0%	1.9%	0.0%	0.3%	0.1%	**1.3%**
Ashford	0.6%	0.9%	2.5%	0.0%	0.7%	0.9%	0.4%	1.3%	0.7%	7.7%	3.0%	57.1%	45.1%	5.3%	**8.7%**
Ashford Out-of-Centre Retail Parks	0.0%	0.8%	0.4%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	1.8%	0.2%	4.3%	3.1%	0.1%	**0.6%**
Maidstone	0.0%	0.5%	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	10.0%	2.2%	3.2%	35.3%	**13.9%**
Ramsgate	0.0%	0.0%	0.3%	0.3%	0.0%	0.0%	10.5%	1.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	**1.3%**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	0.8%	0.3%	4.1%	3.8%	17.2%	4.0%	57.3%	30.5%	18.1%	0.3%	2.8%	0.3%	0.0%	0.0%	**9.7%**
Dover	0.2%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.7%	16.6%	0.1%	0.0%	0.0%	0.6%	0.0%	**1.4%**
Margate	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.9%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Bluewater Shopping Centre, Greenhithe	1.9%	0.9%	2.2%	0.6%	0.2%	1.6%	0.0%	0.4%	0.4%	1.0%	6.0%	0.8%	1.5%	5.9%	**3.2%**
Central London	0.5%	1.1%	0.1%	0.0%	0.1%	1.5%	1.7%	0.2%	1.0%	0.3%	0.1%	1.3%	0.2%	0.7%	**0.7%**
SFT Total	13.1%	13.1%	20.4%	13.4%	13.6%	12.3%	17.7%	12.3%	22.0%	16.4%	22.1%	19.9%	27.5%	17.5%	**18.3%**
Other	1.5%	1.3%	2.7%	3.1%	2.3%	0.6%	3.7%	10.4%	13.2%	57.2%	33.2%	3.1%	14.2%	34.0%	**23.0%**
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Household Telephone Survey Results

TABLE 10: EXISTING TURNOVER - 2015 (of comparison expenditure from survey area) (£Ms)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	£93.7	£29.6	£18.8	£16.9	£45.5	£48.6	£29.3	£20.0	£90.4	£41.1	£78.6	£27.3	£6.3	£11.3	**£557.3**
Sturry Road Out-of-Centre Retail (Combined)	£19.2	£10.8	£5.0	£6.1	£16.7	£13.6	£0.8	£4.5	£0.9	£3.6	£14.3	£2.7	£0.1	£0.0	**£98.4**
Wincheap Out-of-Centre Retail (Combined)	£11.6	£4.7	£1.8	£1.5	£0.6	£0.7	£4.1	£1.0	£1.6	£2.2	£8.7	£0.9	£0.0	£2.4	**£41.9**
Herne Bay	£0.3	£0.2	£0.2	£0.6	£15.7	£1.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	**£18.7**
Whitstable	£0.5	£0.7	£0.1	£0.0	£5.7	£31.2	£1.4	£0.0	£0.0	£0.0	£9.4	£0.1	£0.4	£1.1	**£50.6**
Ashford	£0.9	£0.5	£1.0	£0.0	£0.9	£1.1	£1.6	£0.8	£2.3	£24.2	£14.6	£160.4	£66.7	£74.9	**£349.9**
Ashford Out-of-Centre Retail Parks	£0.0	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£5.6	£0.8	£12.2	£4.6	£1.7	**£25.6**
Maidstone	£0.0	£0.3	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£1.1	£48.7	£6.1	£4.7	£498.2	**£559.5**
Ramsgate	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£48.3	£0.9	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	**£50.7**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	£1.2	£0.2	£1.6	£1.2	£22.0	£4.9	£262.4	£18.4	£61.0	£1.0	£13.9	£0.8	£0.0	£0.6	**£389.1**
Dover	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£56.1	£0.2	£0.0	£0.0	£0.8	£0.0	**£58.0**
Margate	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£4.3	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	**£5.0**
Bluewater Shopping Centre, Greenhithe	£2.9	£0.5	£0.8	£0.2	£0.2	£1.9	£0.2	£0.3	£1.2	£3.2	£29.2	£2.3	£2.2	£83.9	**£129.1**
Central London	£0.8	£0.6	£0.0	£0.0	£0.1	£1.8	£7.7	£0.1	£3.2	£1.0	£0.2	£3.8	£0.2	£10.1	**£29.7**
SFT Total	£20.1	£7.5	£7.9	£4.3	£17.4	£15.0	£81.2	£7.4	£74.3	£51.8	£108.3	£56.0	£40.6	£247.7	**£739.5**
Other	£2.3	£0.7	£1.0	£1.0	£3.0	£0.7	£17.0	£6.3	£44.6	£180.0	£162.3	£8.6	£21.0	£479.6	**£928.2**
Total	**£153.8**	**£56.9**	**£38.5**	**£32.4**	**£127.9**	**£121.5**	**£458.4**	**£60.3**	**£337.3**	**£315.0**	**£489.1**	**£281.0**	**£147.9**	**£1,411.3**	**£4,031.2**

Source: Tables 3 and 9

TABLE 11: TRADE DRAW PATTERN

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	17%	5%	3%	3%	8%	9%	5%	4%	16%	7%	14%	5%	1%	2%	**100%**
Sturry Road Out-of-Centre Retail (Combined)	19%	11%	5%	6%	17%	14%	1%	5%	1%	4%	15%	3%	0%	0%	**100%**
Wincheap Out-of-Centre Retail (Combined)	28%	11%	4%	4%	1%	2%	10%	2%	4%	5%	21%	2%	0%	6%	**100%**
Herne Bay	2%	1%	1%	3%	84%	8%	0%	0%	0%	0%	1%	0%	0%	0%	**100%**
Whitstable	1%	1%	0%	0%	11%	62%	3%	0%	0%	0%	19%	0%	1%	2%	**100%**
Ashford	0%	0%	0%	0%	0%	0%	0%	0%	1%	7%	4%	46%	19%	21%	**100%**
Ashford Out-of-Centre Retail Parks	0%	2%	1%	0%	0%	0%	0%	0%	0%	22%	3%	47%	18%	7%	**100%**
Maidstone	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	1%	1%	89%	**100%**
Ramsgate	0%	0%	0%	0%	0%	0%	95%	2%	3%	0%	0%	0%	0%	0%	**100%**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	0%	0%	0%	0%	6%	1%	67%	5%	16%	0%	4%	0%	0%	0%	**100%**
Dover	0%	0%	0%	0%	0%	0%	0%	1%	97%	0%	0%	0%	1%	0%	**100%**
Margate	0%	0%	0%	4%	0%	0%	85%	2%	9%	0%	0%	0%	0%	0%	**100%**
Bluewater Shopping Centre, Greenhithe	2%	0%	1%	0%	0%	1%	0%	0%	1%	2%	23%	2%	2%	65%	**100%**
Central London	3%	2%	0%	0%	0%	6%	26%	0%	11%	3%	1%	13%	1%	34%	**100%**
SFT Total	3%	1%	1%	1%	2%	2%	11%	1%	10%	7%	15%	8%	5%	33%	**100%**
Other	0%	0%	0%	0%	0%	0%	2%	1%	5%	19%	17%	1%	2%	52%	**100%**

Source: Table 10.

TABLE 12: TURNOVER 2020 (of comparison expenditure from survey area) (£Ms)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	£114.5	£35.8	£23.0	£20.7	£55.6	£59.5	£36.0	£24.1	£108.9	£49.5	£98.7	£34.2	£7.8	£14.0	**£682.1**
Sturry Road Out-of-Centre Retail (Combined)	£23.4	£13.1	£6.1	£7.5	£20.5	£16.7	£1.0	£5.4	£1.1	£4.4	£18.0	£3.3	£0.1	£0.0	**£120.5**
Wincheap Out-of-Centre Retail (Combined)	£14.2	£5.7	£2.2	£1.9	£0.8	£0.8	£5.1	£1.2	£1.9	£2.7	£10.9	£1.1	£0.0	£3.0	**£51.4**
Herne Bay	£0.4	£0.2	£0.3	£0.8	£19.2	£1.9	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	**£22.9**
Whitstable	£0.6	£0.9	£0.1	£0.0	£6.9	£38.1	£1.7	£0.1	£0.0	£0.0	£11.8	£0.1	£0.5	£1.3	**£62.2**
Ashford	£1.1	£0.6	£1.2	£0.0	£1.1	£1.4	£2.0	£1.0	£2.7	£29.1	£18.3	£201.0	£82.5	£92.9	**£434.9**
Ashford Out-of-Centre Retail Parks	£0.0	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£6.8	£1.0	£15.2	£5.7	£2.2	**£31.7**
Maidstone	£0.0	£0.3	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£0.0	£1.3	£61.2	£7.7	£5.9	£618.3	**£695.1**
Ramsgate	£0.0	£0.0	£0.1	£0.1	£0.0	£0.0	£59.2	£1.1	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	**£62.2**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	£1.4	£0.2	£1.9	£1.5	£27.0	£6.0	£321.9	£22.2	£73.5	£1.2	£17.5	£0.9	£0.0	£0.7	**£475.9**
Dover	£0.3	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.5	£67.6	£0.3	£0.0	£0.0	£1.0	£0.0	**£69.9**
Margate	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£5.2	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	**£6.1**
Bluewater Shopping Centre, Greenhithe	£3.5	£0.6	£1.0	£0.3	£0.2	£2.3	£0.2	£0.3	£1.5	£3.8	£36.7	£2.9	£2.8	£104.1	**£160.3**
Central London	£1.0	£0.7	£0.0	£0.0	£0.1	£2.2	£9.5	£0.1	£3.9	£1.2	£0.3	£4.7	£0.3	£12.5	**£36.6**
SFT Total	£24.6	£9.0	£9.6	£5.3	£21.3	£18.3	£99.7	£9.0	£89.5	£62.4	£135.9	£70.2	£50.2	£307.4	**£912.3**
Other	£2.8	£0.9	£1.3	£1.2	£3.7	£0.9	£20.9	£7.5	£53.8	£217.0	£203.7	£10.8	£26.0	£595.2	**£1,145.5**
Total	**£187.9**	**£68.9**	**£47.1**	**£39.6**	**£156.5**	**£148.6**	**£562.3**	**£72.6**	**£406.4**	**£379.6**	**£614.1**	**£352.1**	**£182.7**	**£1,751.5**	**£4,969.7**

Source: Tables 3 and 9.

TABLE 13: TURNOVER 2025 (of comparison expenditure from survey area) (£Ms)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	£139.4	£43.7	£27.9	£25.1	£67.7	£72.4	£44.0	£29.0	£131.2	£59.9	£122.9	£42.4	£9.5	£17.3	**£832.4**
Sturry Road Out-of-Centre Retail (Combined)	£28.5	£16.0	£7.5	£9.1	£24.9	£20.3	£1.2	£6.5	£1.3	£5.3	£22.4	£4.2	£0.1	£0.0	**£147.1**
Wincheap Out-of-Centre Retail (Combined)	£17.3	£7.0	£2.6	£2.3	£0.9	£1.0	£6.2	£1.4	£2.3	£3.2	£13.6	£1.4	£0.0	£3.7	**£63.0**
Herne Bay	£0.5	£0.3	£0.3	£0.9	£23.4	£2.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	**£27.8**
Whitstable	£0.7	£1.1	£0.2	£0.1	£8.4	£46.4	£2.1	£0.1	£0.0	£0.0	£14.7	£0.1	£0.6	£1.6	**£76.1**
Ashford	£1.3	£0.7	£1.4	£0.0	£1.4	£1.7	£2.4	£1.2	£3.3	£35.2	£22.8	£249.6	£101.5	£114.7	**£537.3**
Ashford Out-of-Centre Retail Parks	£0.0	£0.6	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£8.2	£1.3	£18.9	£7.0	£2.7	**£39.1**
Maidstone	£0.0	£0.4	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.0	£1.6	£76.2	£9.5	£7.2	£763.2	**£858.6**
Ramsgate	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£72.5	£1.3	£1.9	£0.0	£0.0	£0.0	£0.0	£0.0	**£76.0**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	£1.7	£0.3	£2.4	£1.8	£32.8	£7.3	£394.1	£26.7	£88.5	£1.4	£21.8	£1.2	£0.0	£0.9	**£580.8**
Dover	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.6	£81.4	£0.3	£0.0	£0.0	£1.3	£0.0	**£84.3**
Margate	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£6.4	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	**£7.5**
Bluewater Shopping Centre, Greenhithe	£4.3	£0.7	£1.3	£0.3	£0.3	£2.8	£0.3	£0.4	£1.8	£4.6	£45.7	£3.6	£3.4	£128.5	**£198.1**
Central London	£1.2	£0.9	£0.0	£0.0	£0.2	£2.7	£11.6	£0.1	£4.7	£1.5	£0.4	£5.8	£0.4	£15.4	**£44.9**
SFT Total	£30.0	£11.0	£11.7	£6.4	£25.9	£22.3	£122.0	£10.8	£107.8	£75.4	£169.3	£87.1	£61.8	£379.4	**£1,121.0**
Other	£3.4	£1.1	£1.5	£1.5	£4.5	£1.1	£25.6	£9.1	£64.8	£262.4	£253.8	£13.4	£32.0	£734.7	**£1,408.7**
Total	**£228.7**	**£84.0**	**£57.2**	**£48.0**	**£190.4**	**£180.8**	**£688.3**	**£87.5**	**£489.6**	**£459.1**	**£765.1**	**£437.3**	**£224.9**	**£2,162.0**	**£6,102.9**

Source: Tables 3 and 9.

TABLE 14: TURNOVER 2031 (of comparison expenditure from survey area) (£Ms)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	Total
Canterbury City Centre	£176.4	£56.2	£35.3	£31.7	£85.5	£91.4	£55.5	£36.0	£162.8	£74.9	£157.0	£54.0	£12.1	£21.9	**£1,050.7**
Sturry Road Out-of-Centre Retail (Combined)	£36.1	£20.6	£9.4	£11.5	£31.5	£25.6	£1.5	£8.1	£1.6	£6.6	£28.6	£5.3	£0.1	£0.0	**£186.4**
Wincheap Out-of-Centre Retail (Combined)	£21.9	£9.0	£3.3	£2.9	£1.2	£1.3	£7.8	£1.7	£2.9	£4.0	£17.3	£1.7	£0.1	£4.7	**£79.8**
Herne Bay	£0.6	£0.3	£0.4	£1.2	£29.5	£2.9	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	**£35.2**
Whitstable	£0.8	£1.4	£0.2	£0.1	£10.7	£58.6	£2.7	£0.1	£0.0	£0.0	£18.8	£0.1	£0.8	£2.1	**£96.3**
Ashford	£1.7	£0.9	£1.8	£0.0	£1.8	£2.1	£3.1	£1.5	£4.1	£44.0	£29.2	£317.9	£128.5	£145.5	**£682.0**
Ashford Out-of-Centre Retail Parks	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£10.2	£1.7	£24.1	£8.9	£3.4	**£49.5**
Maidstone	£0.0	£0.5	£0.0	£0.1	£0.0	£0.6	£0.0	£0.0	£0.0	£2.0	£97.3	£12.1	£9.1	£968.5	**£1,090.3**
Ramsgate	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£91.4	£1.7	£2.4	£0.0	£0.0	£0.0	£0.0	£0.0	**£95.8**
Westwood SC/Westwood Gateway/East Kent/Broadstairs Retail Park	£2.2	£0.3	£3.0	£2.3	£41.4	£9.2	£496.9	£33.2	£109.8	£1.8	£27.8	£1.5	£0.0	£1.1	**£730.6**
Dover	£0.5	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.8	£101.0	£0.4	£0.0	£0.0	£1.6	£0.0	**£104.6**
Margate	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£8.1	£0.2	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	**£9.4**
Bluewater Shopping Centre, Greenhithe	£5.5	£1.0	£1.6	£0.4	£0.4	£3.6	£0.3	£0.5	£2.2	£5.8	£58.4	£4.6	£4.3	£163.0	**£251.5**
Central London	£1.6	£1.2	£0.1	£0.0	£0.2	£3.4	£14.6	£0.2	£5.8	£1.8	£0.5	£7.4	£0.5	£19.6	**£56.8**
SFT Total	£37.9	£14.2	£14.7	£8.1	£32.8	£28.1	£153.8	£13.4	£133.7	£94.3	£216.3	£111.0	£78.2	£481.5	**£1,418.2**
Other	£4.4	£1.4	£1.9	£1.9	£5.6	£1.4	£32.2	£11.3	£80.4	£328.2	£324.2	£17.0	£40.5	£932.4	**£1,782.7**
Total	**£289.5**	**£108.0**	**£72.3**	**£60.6**	**£240.5**	**£228.2**	**£867.9**	**£108.7**	**£607.5**	**£574.2**	**£977.4**	**£556.8**	**£284.6**	**£2,743.7**	**£7,720.0**

Source: Tables 3 and 9.

TABLE 15: EXISTING TURNOVERS TRADING PERFORMANCE - 2015
(Comparison goods floorspace provision and turnover figures) - 2013 Prices

Convenience Provision Store:	[A] Net Comparison Floorspace (sqm)	[B] Market Share From Survey Area (%)	[C] Turnover from Survey Area 2015 (£Ms)	[D] Inflow (%)	[E] Total Comparison Turnover (£Ms)	[F] Actual Sales Densities (£/sqm)
CANTERBURY						
Canterbury City Centre	77,433	13.8%	£557.3	5.0%	£585.2	£7,557
Sturry Road Out-of-Centre Retail (Combined)	19,604	2.4%	£98.4	-	£98.4	£5,017
Wincheap Out-of-Centre Retail (Combined)	18,697	1.0%	£41.9	-	£41.9	£2,240
OTHER LOCATIONS						
Herne Bay	12,888	0.5%	£18.7	-	£18.7	£1,452
Whitstable	12,104	1.3%	£50.6	-	£50.6	£4,179

Source:

[A] = DTZ 2011 Retail Study, Trevor Wood, Experian Town Centre Reports and application documentation on the planning register

[B] = Primary evidence, derived from the results of the Household Telephone Survey.

[C] = [B] & Table 3

[D] = Assumption carried over from 2011 Retail Study

[E] = Applying [D] to [C]

[F] = [E] / [A]

TABLE 16: COMMITMENTS AND PIPELINE DEVELOPMENT

Development	[A] Gross Floorspace (sqm gross)	[B] Net Sales Area (sqm net)	[C] Net Comparison Factor (%)	[D] Net Comparison Floorspace (sqm net)	[E] Turnover 2015 (£M)	[F] Turnover 2020 (£M)	[G] Turnover 2025 (£M)	[H] Turnover 2031 (£M)
Sainsbury's, Altira Business Park, Herne Bay	9,258	5,575	35%	1,951	£15.6	£17.3	£19.2	£21.9
Other Unimplemented Permissions	710	547	100%	547	£3.3	£3.6	£4.0	£4.6
Total Pipeline Development		**6,122**	**-**	**2,498**	**£18.9**	**£20.9**	**£23.3**	**£26.5**

Source:

[A - D] = Application documentation (Sainsbury's) and Canterbury CC's Commerical Information Audit 2013

[E - H] = [D] x Benchmark sales density in 2015 (Sainsbury's - £8,000/sqm, Other £6,000/sqm) grown by a floorspace efficiency factor as per Experian's Retail Planner 12.1 Addendum - Oct 2014.

TABLE 17: FUTURE COMPARISON FLOORSPACE CAPACITY

		2015	2020	2025	2031
[A]	**Total Available Comparison Expenditure in Survey Area** (£Ms)	£4,031.2	£4,969.7	£6,102.9	£7,720.0
[B]	**Comparison Turnover of Destinations in Canterbury District** (constant market shares) (£Ms)	£766.8	£939.2	£1,146.4	£1,448.5
[C]	**Market Share** (%)	19%	19%	19%	19%
[D]	**Inflow of Expenditure** (£Ms)	£27.9	£34.1	£41.6	£52.5
[E]	**Total Comparison Turnover of Destinations in Canterbury District** (constant market shares) (£Ms)	£794.7	£973.3	£1,188.0	£1,501.0
[F]	**Benchmark Turnover** (grown by efficiency rate) (£Ms)	£794.7	£880.0	£979.2	£1,115.8
[G]	**Turnover of Commitments** (grown by efficiency rate) (£Ms)	£18.9	£20.9	£23.3	£26.5
[H]	**Residual Expenditure** (£Ms)	-£18.9	£72.3	£185.5	£358.7
[I]	**Benchmark Sales Density** (£/sqm)	£7,557	£8,368	£9,312	£10,611
[J]	**Floorspace Capacity** (sqm net)	**-2,500**	**8,645**	**19,924**	**33,800**

Source:

[A] = Table 3

[B] = Tables 10, 12, 13 and 14

[C] = [B] / [A]

[D] = Inflow rate of 5% applied to Canterbury's Turnover in Tables 10, 12, 13 and 14

[E] = [B] + [D]

[F] = Assumed equilibrium at base year, grown by efficiency rates derived from Experian Retail Planner Briefing Note 12.1 Addendum (Oct 2014)

[G] = Table 16

[H] = [E] - ([F] + [G])

[I] = Table 15 [F] (Canterbury City Centre's existing sales density) grown by efficiency rates derived from Experian Retail Planner Briefing Note 12.1 Addendum (Oct 2014)

[J] = [H] / [I]