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Planning. Design. Economics.

**Thanet Retail and Leisure
Assessment**

2016 Update

Thanet District Council

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1.0 Introduction

Background

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by the Thanet District to prepare the Thanet Town Centre, Retail, Leisure, Tourism and Culture Assessment published in December 2012 (TCRLTC 2012). The objectives of TCRLTC 2012 were to:

- 1 assess changes in circumstances and shopping patterns;
- 2 assess the future need and (residual) capacity for retail floorspace distributed by town centre for the period up to 2031;
- 3 assess the existing supply and demand for retail and other town centre uses and the role played by each of the centres;
- 4 review the proposed land allocations in the Core Strategy Preferred Options document and comment on their appropriateness in terms of accommodating potential growth and meeting the identified need;
- 5 audit existing commercial leisure provision and assess potential future requirements;
- 6 audit existing tourism and cultural uses and facilities within the District and assess potential future requirements; and
- 7 provide advice on policies to be included in development plan documents to address future needs, and provide recommendations on how each town centre can develop its role.

1.2 This report provides a partial update of the TCRLTC 2012, and should be read alongside the previous study. This report updates the District wide retail capacity projections and need assessment, including:

- 1 update population projections scenarios using the GL Hearn 2016 SHMA report;
- 2 Experian's local expenditure data (the latest 2014 data, which was issued in December 2015, will be obtained) for the six study area zones;
- 3 Experian's latest (October 2015) expenditure growth projections and home shopping projections;
- 4 revised retail sales floorspace for main stream food stores in the District based on the latest StorePoint database;
- 5 benchmark turnover estimates for existing and proposed food store floorspace based on the latest Mintel 2015 data;
- 6 Experian's latest growth forecast for special forms of trading and growth in turnover efficiencies;
- 7 an update on pipeline retail developments;
- 8 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met; and

9 an updated assessment of the need for commercial leisure uses.

2.0 **Recent Changes and Retail Trends**

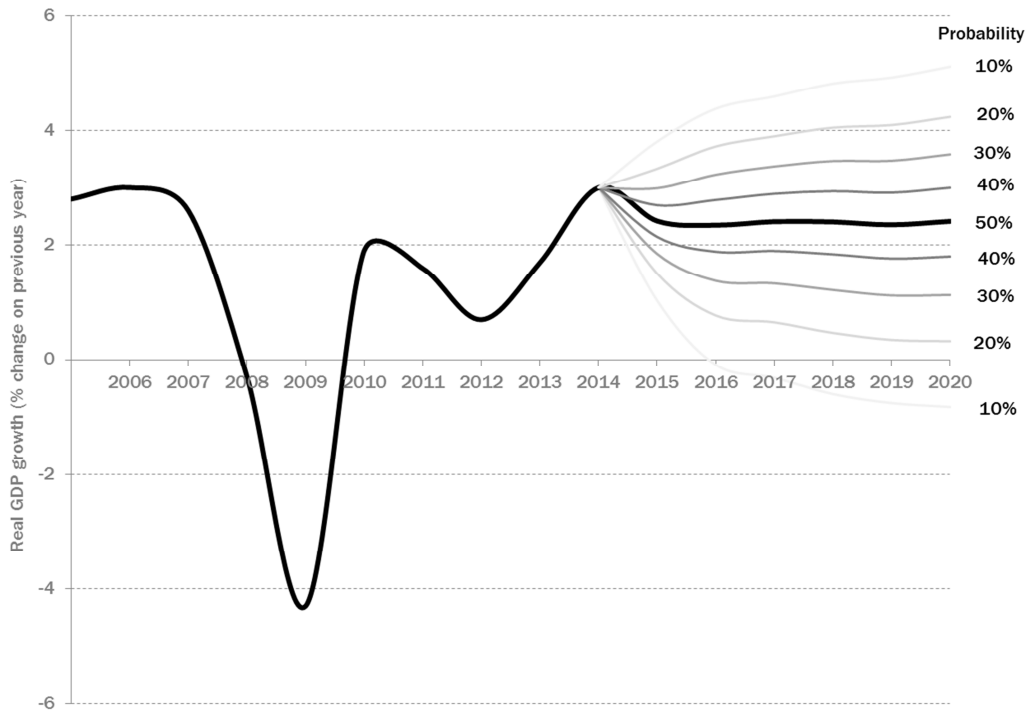
Retail and High Street Trends

- 2.1 This section considers the changes in the retail and leisure sector nationally and the implications for Thanet.
- 2.2 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Phones 4 U, Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks. The retail sector is still experiencing difficult trading conditions, highlighted by recent problems for BHS and Austin Reed.
- 2.3 Many town centre development schemes were delayed or cancelled. The demand for traditional retail warehouse operators was, and still is affected. The main food store operators have seen a reduction in growth, with proposed new food store developments cancelled.
- 2.4 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted. This study takes a long term view recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.
- 2.5 An overview of national trends within the retail and leisure sector is set out below.

Expenditure Growth

- 2.6 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the recovery from the economic downturn is expected to result in slower growth in the short term.
- 2.7 Figure 2.1 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014. The OBR forecasts that growth will be slightly above 2% per year from 2015 onwards.

Figure 2.1 Forecast GDP Growth to 2020



Source: ONS, OBR

2.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Thanet.

2.9 For convenience goods, Experian anticipates limited growth (0.1% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum), still at a lower rate than previous pre-recession trends. Historically comparison goods expenditure has growth significantly more than convenience goods expenditure, and Experian’s latest national growth rate recommendations are consistent with these past trends.

2.10 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014.

New Forms of Retailing

2.11 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has

become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within Thanet.

- 2.12 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 13 (October 2015) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for over a tenth of total retail sales..."

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2015 against 4.7% in June 2008..

...non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 57.3 million internet users in the UK (representing 88.4% of the population) in mid-year 2014 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.8% by 2020 rising to 19.6% by the mid-2030s."

- 2.13 This retail update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

- 2.14 The implications for the demand for retail space have been carefully considered. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

- 2.15 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

- 2.16 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury's Central/Local store and Marks and Spencer's Simply Foods formats). The number of

Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. This trend has been evident in Thanet, with a number of Tesco Express and Tesco Metro stores in the District, and Sainsbury's Local in Birchington. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas.

- 2.17 The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade. Thanet has Aldi stores in Margate and Ramsgate, and a Lidl store in Ramsgate. The discount sector is actively expanding and may look for further opportunities in Thanet.
- 2.18 Food store operators had a programme of store extensions prior to the recession, particularly Tesco, Sainsbury and Asda, in order to increase the sale of non-food products such as clothing and electrical goods. The recession halted this trend and a number of proposed new stores have not been implemented.
- 2.19 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.
- 2.20 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In some cases, charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages. The discount comparison sector has also grown significantly in recent years e.g. pound shops.
- 2.21 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres.
- 2.22 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Canterbury. In general, operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.
- 2.23 The demand for premises within the bulky goods sector, ie. furniture, carpets, electrical and DIY goods, was particularly weak during and after the recession.

This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.

- 2.24 The continuation of national trends will influence future operator requirements across Thanet, with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

High Street Retail Trends

- 2.25 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is high. It is unlikely these changes will have a significant impact on Thanet, because the centres already have a broad mix of retail and non-retail uses.
- 2.26 These trends are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.
- 2.27 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.
- 2.28 Experian data indicates that retail expenditure reduced by 3.9% during 2009 to 2011, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street performed better than out-of-centre retail parks during the recession. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 8.2% to 10.8%.
- 2.29 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by around 3% per annum, in real terms over and above inflation. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.

- 2.30 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2% per annum for comparison floorspace.
- 2.31 The challenge for town centres generally, and centres within Thanet specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.
- 2.32 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace if Thanet is to maintain its market share of expenditure, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

Services, Food and Beverage

- 2.33 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:
- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
 - **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
 - **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
 - **Class A4** pubs/bars (Class A4).
- 2.34 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. Themed restaurants have also expanded rapidly.
- 2.35 The key categories for food and beverage offers are:
- 1 **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;

- 2 **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- 3 **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
- 4 **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.36 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

The Shopping Hierarchy

2.37 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Development plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.38 The National Planning Practice Guidance (NPPG) replaced the PPS4 guidance on town centres in 2012. In terms of plan-making the NPPG's emphasis is on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs. These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate. This section provides an overview of the shopping hierarchy in Thanet and the surrounding sub-region.

The Designation of Town Centres

2.39 The NPPF indicates that local planning authorities should adopt a positive and proactive approach to planning for growth and the future of the centres within their areas. Local planning authorities are expected to identify the hierarchy of centres and how the role of different centres will contribute to the overall vision for their area. The town centre hierarchy is set out in the Draft Thanet Local Plan to 2031 Preferred Options Consultation (January 2015) as follows:

Westwood - this centre sits at the top of the hierarchy as it caters for high order need, attracts the major national retailers and has a catchment that covers the whole of Thanet as well extending to areas outside of the district.

Coastal Town Centres - Margate, Broadstairs and Ramsgate. The catchments of these town centres are their individual town populations and tourist trade with a wide range of shops to cater for everyday need, special interest and tourism. These towns have traditionally attracted national retailers and services as well as local businesses.

District Centres - Cliftonville, Westgate, Birchington and Minster. These centres cater for local needs and services. They serve large residential and semi-rural locations but catchments are limited and these locations are not appropriate for large scale retail development.

Local Centres - Several across the district such as Westbrook and St Peter's. These cater for a more restricted local need and tend to have a small catchment. These centres provide services such as takeaways, hairdressers and small convenience stores. Business is often local rather than the national multiples. These centres are not appropriate for large scale retail development.

2.40 Westwood Cross sits at the top of retail hierarchy within Thanet. The shopping centre opened in 2005 and was developed to provide a destination for national multiple retailers to locate in Thanet to retain comparison expenditure within the district. The centre provides the scale and nature of units sought by national multiple retailers which Thanet's existing individual towns could not offer. The centre was strengthened in 2007 with the opening of the adjacent leisure complex, which provided a casino, bingo, multiplex cinema and restaurant units.

2.41 The three smaller town centres within Thanet – Margate, Ramsgate and Broadstairs - play a more specialist role in the district supporting the tourist market and offering a larger number of independent niche shops.

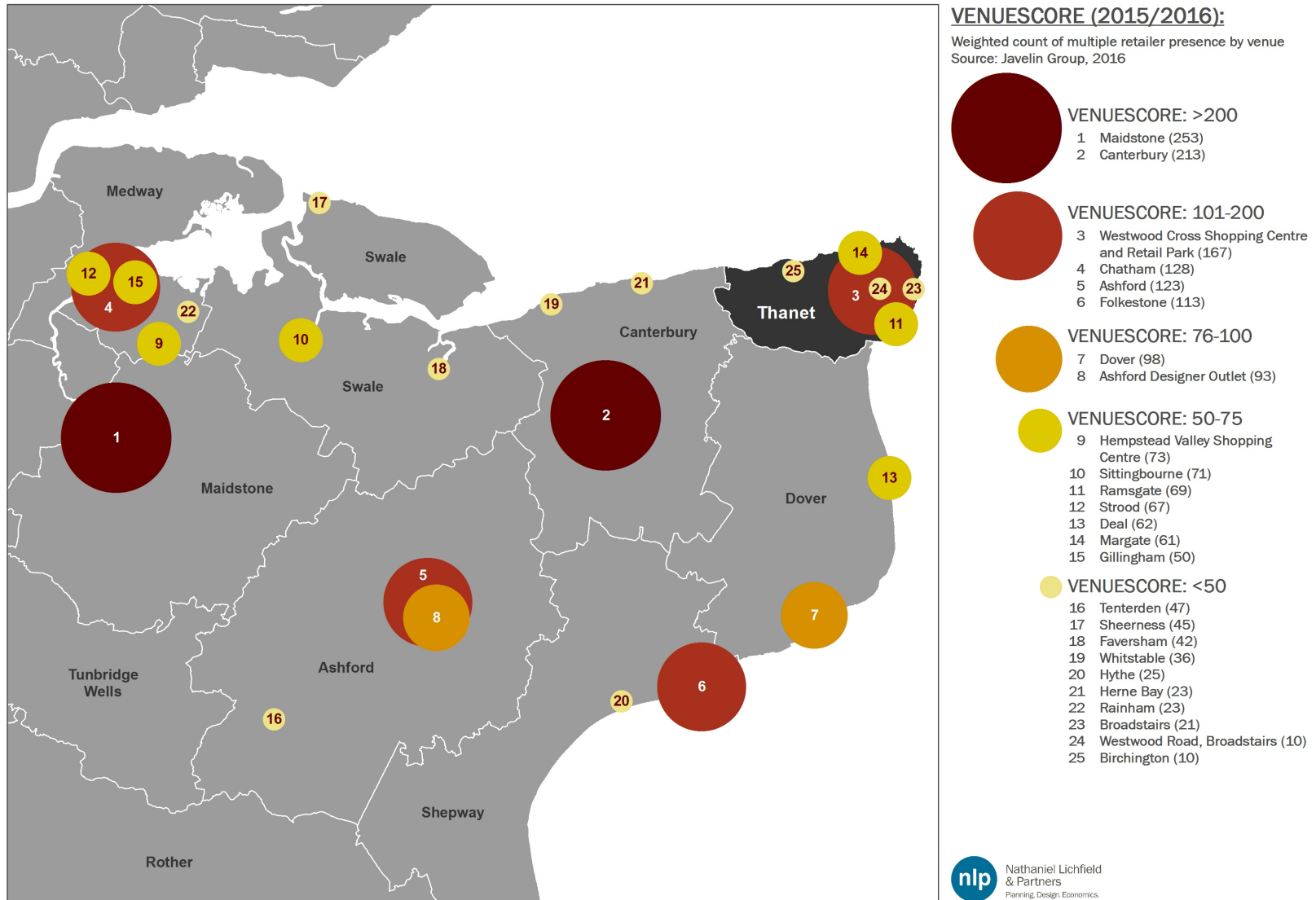
Town Centre Hierarchy Analysis

2.42 Venuescore ranks the UK's top 3,000 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. The results for Thanet and other selected centres are shown in Table 2.1. Each destination is given a weighted score for the number of multiple retailers present; the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.43 Westwood Cross achieves the highest Venuescore in Thanet, and is ranked significantly higher than any other centre in the District, reflecting its position in the retail hierarchy. The next highest scores are achieved by Ramsgate and Margate. Smaller centres have few multiple retailers and are not included within Venuescore's analysis. The location of these Venuescore centres is shown in Figure 2.1.

2.44 The Venuescore usually closely correlates to the actual market size of the shopping destination in terms of consumer expenditure, however some larger shopping centres with fewer but larger stores and town centres with a high proportion of independent stores can generate spending levels in excess of their relative Venuescore.

Figure 2.2: Venuescore Shopping Hierarchy



2.45

Venuescore also assess the market position of the larger town centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (ie. lower, middle to upscale).

Table 2.1 Venuescore UK shopping Index 2015/16

Venue	2015 Rank	2015 Venuescore	Market Position Classification
Maidstone	49	253	Middle
Canterbury	76	213	Upper Middle
Westwood Cross Shopping Centre and Retail Park	135	167	Middle
Chatham	193	128	Lower Middle
Ashford	202	123	Middle
Folkestone	225	113	Lower Middle
Dover	270	98	Lower Middle
Ashford Designer Outlet	288	93	Upscale
Hempstead Valley Shopping Centre	390	73	Middle
Sittingbourne	405	71	Lower Middle
Ramsgate	418	69	Lower Middle
Strood	429	67	Lower Middle
Deal	472	62	Middle
Margate	480	61	Lower Middle
Gillingham	615	50	Lower Middle
Tenterden	659	47	Upper Middle
Sheerness	688	45	Lower Middle
Faversham	735	42	Middle
Whitstable	882	36	Middle
Hythe	1,281	25	Middle
Herne Bay	1,372	23	Middle
Rainham	1,372	23	Lower Middle
Broadstairs	1,486	21	Upper Middle
Birchington	3,152	10	Lower Middle
Westwood Road, Broadstairs	3,152	10	Lower Middle

Source: Venuescore, Javelin Group 2015/16: **BOLD** indicates shopping destinations located in Thanet

2.46

Broadstairs is the only “upper middle” centre in the District, suggesting that it has a good and high quality comparison retail offer. Westwood Cross is classed as “middle”, suggesting that the retail offer is more mid-market. Other centres within Thanet are classed as “lower middle”. The higher order centres of Canterbury and Maidstone are classified as “upper middle” and “middle” respectively. Ashford Designer Outlet is the only centre in the surrounding area that is classed as “upscale”.

2.47 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

- 1 Age focus (is the offer targeting younger or older consumers?)
- 2 Fashionability of its offer (is the clothing offer traditional or progressive?)
- 3 Food/service bias (how strong is the food and beverage offer?)

2.48 The results for centres within Thanet and the surrounding area are shown in Table 2.2 below.

Table 2.2 Centre Attributes

Venue	Age	Fashion Position	Food Index (Ave. = 100)
Maidstone	Mid	Fashion Moderate	105
Canterbury	Old	Fashion Moderate	97
Westwood Cross Shopping Centre and Retail Park	Mid	Fashion Moderate	47
Chatham	Mid	Fashion Moderate	71
Ashford	Mid	Fashion Moderate	84
Folkestone	Old	Updated Classic	59
Dover	Mid	Fashion Moderate	80
Ashford Designer Outlet	Old	Fashion Forward	59
Hempstead Valley Shopping Centre	Mid	Updated Classic	50
Sittingbourne	Old	Updated Classic	68
Ramsgate	Old	Updated Classic	105
Strood	Old	Updated Classic	90
Deal	Old	Updated Classic	98
Margate	Mid	Updated Classic	109
Gillingham	Old	Fashion Moderate	109
Tenterden	Old	Traditional	90
Sheerness	Old	Updated Classic	108
Faversham	Old	Traditional	115
Whitstable	Old	Fashion Moderate	202
Hythe	Old	Fashion Moderate	73
Herne Bay	Mid	Fashion Moderate	132
Rainham	Old	Fashion Moderate	158
Broadstairs	Old	Fashion Moderate	260
Birchington	Old	n/a	121
Westwood Road, Broadstairs	Old	Fashion Moderate	61

2.49 The centres within the sub-region tend to cater for older customers, with moderate or traditional tastes, while Westwood Cross appeals to a younger customer. Margate also attracts a younger age group, but has a more traditional offer. Ramsgate, Margate, Broadstairs and Birchington all have an

above average food/service (ie. A3/A4/A5) offer, with Broadstairs achieving a particularly high score. Westwood Cross achieves an index of just 47, ie. 53 points below the index average of 100, and this is generally lower than nearby comparable centres. This suggests there is scope to improve Westwood Cross's food and beverage/leisure offer.

Existing Retail Provision in Thanet

2.50 A summary of existing retail provision is provided in Table 2.3 below:

Table 2.3 Existing Retail Provision

Centre	Town Centre Shop Units (Convenience, Comparison, Service and vacant units)	Town Centre Convenience Goods Sales Floorspace (sq.m gross)	Town Centre Comparison Goods Sales Floorspace (sq.m gross)
Westwood Cross	91	18,440	65,850
Ramsgate	320	5,860	23,660
Margate	235	4,600	13,410
Broadstairs	213	2,670	7,970
Total	722	31,750	110,890

Source: Goad (from Thanet Town Centre, Retail, Leisure, Tourism and Culture Assessment, December 2012)

2.51 It should be noted that the figures within Table 2.3 are gross floorspace figures, and relate only to the convenience and comparison floorspace of the retail units within the town centre boundaries as defined by GOAD.

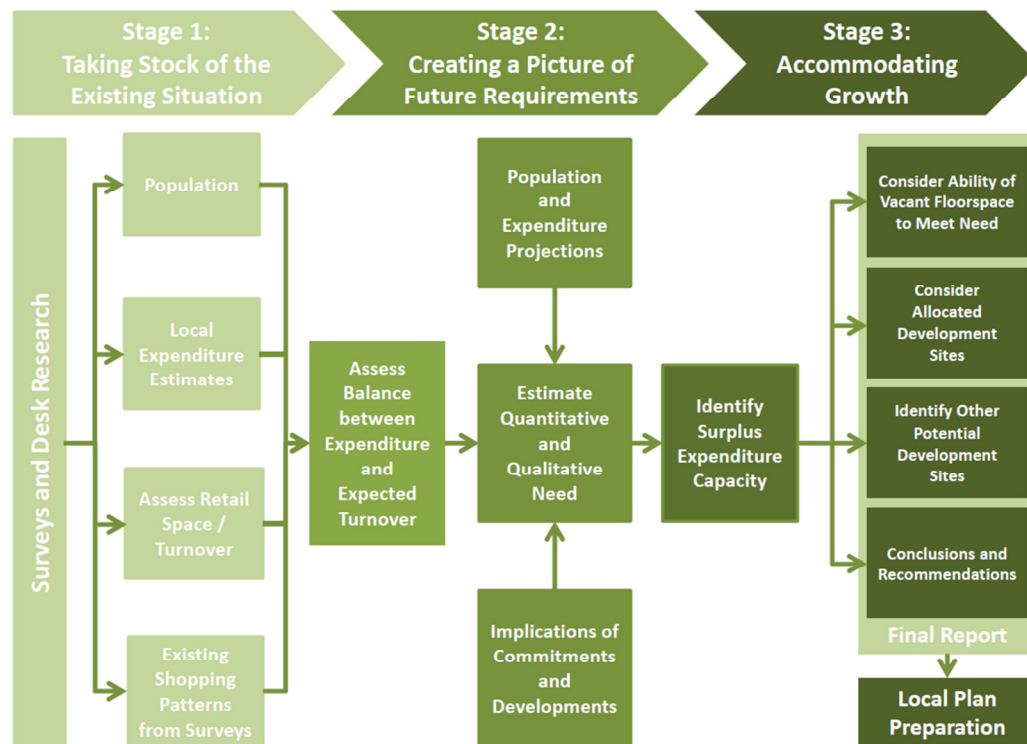
2.52 Ramsgate is the largest centre in terms of the number of units and Westwood Cross is the largest centre in terms of retail floorspace. Broadstairs is the smallest centre both in terms of the number of units and the amount of retail floorspace.

3.0 Retail Need Assessment

Introduction

3.1 This section objectively assesses the quantitative scope for new retail floorspace in Thanet in the period from 2016 to 2031. The methodology is summarised in Figure 3.1 below and set out in more detail in Appendix 1.

Figure 3.1: Methodology for Estimating Future Requirements for Retail Floorspace



Study Area

3.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in Thanet. The study area is shown in Appendix 1. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure will inflow from surrounding areas.

Population and Expenditure

3.3 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. The 2011 base year population for each zone has been obtained and projected to 2031 using the 2016 Thanet Strategic Housing Market Assessment projections. Population within the study area is expected to increase between 2011 and 2031 by 19.4% (26,056 persons).

- 3.4 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 3 in Appendix 3.
- 3.5 Based on the SHMA population projections, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12.6% from £297.15 million in 2016 to £334.73 million in 2031, as shown in Table 3 (Appendix 2).
- 3.6 Comparison goods spending is forecast to increase by 78.2% between 2016 and 2031, increasing from £421.17 million in 2016 to £750.66 million in 2031, as shown in Table 3 (Appendix 3).
- 3.7 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and beverage does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.
- 3.8 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

- 3.9 Existing convenience goods retail sales floorspace within Thanet is around 34,300 sq.m net, as set out in Table 9 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores.
- 3.10 Comparison goods retail sales floorspace within Thanet is estimated to be around 95,800 sq.m net, as shown in Table 9, Appendix 3.

Existing Spending Patterns 2016

- 3.11 The results of the household shopper questionnaire survey undertaken by NEMS in July 2012 have been used to estimate base year shopping patterns within the study area zones.

Tourist Spending

- 3.12 An allowance has been made for retail expenditure generated by tourist visitors to Thanet District. Thanet's tourism initiatives and planned regeneration schemes aim to increase the numbers of visitors to the centres in the District, which should subsequently increase the level of tourist spending in Thanet over time.
- 3.13 In order to quantify the current levels of tourist spending, we have reviewed data available from Visit Kent. Visit Kent's study "*The Economic Impact of the Kent Visitor Economy 2013 – Thanet District*" indicates that tourists spent 1.67 million nights in the District in 2013. There were a further 2.90 million day trips (4.57 million days in total). These visitor numbers suggest that on average there were an additional 12,520 people within the District each day, therefore the District's population is on average 9.3% higher than the resident population. The Visit Kent's study also indicates that tourist visitors spent

around £66.7 million on shopping (in 2013), compared with the District's resident expenditure of around £718.3 million (combined convenience and comparison goods spending in 2016), ie. around an additional 9% of expenditure is generated by tourists. Visitors also spent around £56.5 million on food and drink.

- 3.14 We have also considered the results of the 2012 in-centre survey undertaken to identify the proportion of visitors to each centre from outside the District, and those whose main purpose for visiting the centre was as a tourist, either on holiday or on a day trip.
- 3.15 Drawing together the information available, it seems reasonable to assume retail facilities within Thanet will attract around 9% of their trade from tourist visitors.
- 3.16 The tourist spending has been incorporated into the estimated inflow to facilities within the District. In terms of convenience goods spending, in 2016, Table 5 in Appendix 2 shows a total of £41.87 million of inflow to facilities within the District. We estimate that £30.02 million of this (or 9% of the total turnover of facilities) can be attributed to tourist spending. For comparison goods spending, Table 5 in Appendix 3 shows a total of £107.87 million of inflow to facilities within the District. We estimate that £41.36 million of this (or 9% of the total turnover of facilities) can be attributed to tourist spending.
- 3.17 As a result of forecast population and expenditure growth over the study period, the amount of tourism spending attracted to Thanet will increase. By 2031, the amount of convenience inflow into the District attributed to tourists is estimated to be £33.81 million, and the amount of comparison tourist inflow is estimated to be £73.72 million.
- 3.18 Tourist visitors will generate additional spending within the centres, for example using leisure and entertainment facilities in the centres, such as restaurants and bars, and this has been taken into account in the assessment of food and beverage floorspace requirements in the next section.
- 3.19 Facilities within the District, particularly Westwood Cross, will also attract other expenditure inflow from residents who live in neighbouring authorities.

Convenience Shopping

- 3.20 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. This indicates that the majority of residents within all zones carry out their convenience retail shopping within the study area (ranging from 85% in Zone 6 to 100% in Zone 1).
- 3.21 The level of convenience goods expenditure attracted to shops/stores in Thanet in 2016 is estimated to be £333.54 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares identified in Table 4. The market share of total

convenience expenditure generated within the study area that is retained by shops/stores in Thanet (ie. excluding any inflow to these shops/ stores from beyond the study area) is estimated to be about 98% (£291.67 million of £297.15 million, derived from Tables 5 and 3, Appendix 2). Consequently, just 2% of available expenditure in the study area is leaking to facilities beyond Thanet District.

- 3.22 The total benchmark turnover of the existing convenience sales floorspace within Thanet District is £329.21 million at 2016 (Table 9, Appendix 2). The actual turnover of the convenience floorspace at facilities within the District is £333.54 million (Table 5, Appendix 2).
- 3.23 These figures suggest that collectively convenience retail facilities in the District are trading at a level that is close to the average benchmark turnover, with limited available surplus convenience expenditure. Given the high level of convenience expenditure retained in the District, this suggests that there is currently an appropriate supply of convenience goods floorspace.

Comparison Shopping

- 3.24 The estimated comparison goods expenditure currently attracted by shopping facilities within Thanet District is £459.55 million in 2016, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.
- 3.25 The market share of total comparison goods expenditure generated within the study area that is retained by centres/facilities in Thanet (ie. excluding any inflow to these shops/stores from beyond the study area) is 84% (£351.68 million out of £421.17 million, derived from Tables 3 and 5, Appendix 3).
- 3.26 The lower retention levels compared to the convenience goods market shares reflects the influence of higher order centres outside Thanet District, in particular Canterbury.
- 3.27 Based on the base year estimate of comparison goods expenditure attracted to facilities within Thanet, the average sales density for existing comparison sales floorspace (95,818 sq.m net) is around £4,800 per sq.m net in 2016.
- 3.28 Based on existing shopping patterns, Table 3.1 below suggests the following average sales density figures for the centres in the District.

Table 3.1: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2016 (£ per sq.m net)
Margate	£4,205
Westwood Cross (including Retail Park)	£4,885
Broadstairs	£6,731
Ramsgate	£3,979
Birchington/Westgate	£4,088
District Average	£4,796

- 3.29 Table 3.1 indicates that trading levels amongst comparison facilities in the District vary, with Broadstairs Town Centre trading at a higher level than any other destination in the District. This suggests that the existing operators in Broadstairs are trading successfully, and could be an indication that additional floorspace is required to meet demand. The figure for Westwood Cross is lowered due to the inclusion of the retail parks, which trade at a lower sales density than high street type comparison retailers. The average sales density figures should be viewed in the context of the type of floorspace in each centre.

Capacity for Convenience Goods Floorspace

- 3.30 The future levels of available convenience goods expenditure in 2021, 2026 and 2031 are shown at Tables 6 to 8 in Appendix 2.
- 3.31 The total level of convenience goods expenditure available for shops in the District between 2016 and 2031 is summarised in Table 10 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £333.54 million in 2016 to £375.72 million in 2031.
- 3.32 Table 10 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is a deficit of £21.05 million convenience goods expenditure in 2016. This is primarily due to the opening of the larger Sainsbury's store at Westwood Cross. In 2021, this deficit decreases to £8.11 million. By 2026, future expenditure growth generates an expenditure surplus of £6.99 million, increasing to £21.13 million in 2031.
- 3.33 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 11. Surplus expenditure is converted into floorspace estimates using an assumed average sales density figure of £12,000 per sq.m, based on the average turnover of the main food supermarket operators.
- 3.34 The floorspace requirements are summarised in Table 3.2 below.

Table 3.2: Convenience Goods Floorspace Projections

Centre	Floorspace (sq.m gross)		
	By 2021	By 2026	By 2031
Margate/Cliftonville	480	767	1,035
Westwood Cross	- 1,718	- 1,120	- 561
Broadstairs/St Peters	268	630	968
Ramsgate	448	890	1,304
Birchington/Westgate	- 338	- 245	- 159
Other Thanet	- 105	- 88	- 71
District Total	- 965	833	2,516

Source: Table 11, Appendix 2

- 3.35 As noted above, since the previous Study was completed, Sainsbury's has opened an enlarged food store at Westwood Cross, replacing the existing Sainsbury's store (ref. F/TH/11/0200). The supermarket has a net sales area of 7,616 sq.m, comprising 4,189 sq.m net convenience goods floorspace and 3,427 sq.m net comparison goods floorspace. The implementation of this larger store has been taken into account in the above capacity assessment and already deducted from the residual floorspace needs, which has resulted in a deficit of convenience goods expenditure within Westwood Cross over the study period, and this may result in some stores trading at below company average turnovers. In addition, a new Farmfoods store has opened at Richborough Close, Margate. Both the larger Sainsbury's store and the Farmfoods stores have been included in the estimated benchmark turnovers of existing facilities (Table 9, Appendix 2).
- 3.36 In terms of retail commitments, in June 2013, permission was granted on appeal for a Tesco superstore at the Arlington site, Margate (appeal ref. APP/Z2260/A/11/2163595). This scheme included a store with a total net sales area of 4,052 sq.m, comprising 2,508 sq.m net convenience goods floorspace and 1,544 sq.m net comparison goods floorspace.
- 3.37 Permission was also granted on appeal in October 2014 for a mixed use development at land at New Haine Road, Ramsgate, including up to 550 dwellings, 63,000 sq.m of Class B1 floorspace and sui generis use, a new local centre comprising up to 2,000 sq.m retail (Class A1, A2 and A3) and community facilities (appeal ref. APP/Z2260/A/14/2213265).
- 3.38 If the above commitments are implemented, they would absorb all of the capacity for convenience goods floorspace in the District by 2031.
- 3.39 The TCRLCT 2012 retail capacity assessment suggested a marginally higher figure of 3,941 sq.m gross would be required within Thanet by 2031. The updated floorspace projection is slightly lower despite the SHMA's higher population growth projections. These higher population projections have been offset by lower expenditure growth forecasts and an increase in existing convenience sales floorspace in the District.

Capacity for Comparison Goods Floorspace

- 3.40 The household survey suggests that the District's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Canterbury.
- 3.41 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure. Indeed, retail development will be necessary in Thanet District in order to maintain existing market share in the future. An appropriate strategy for

Thanet District should be to seek to maintain existing 2016 market share for the town centres in the face of increasing future competition, whilst maintaining the vitality and viability of centres.

- 3.42 The retail capacity projections in this report assume centres within Thanet District can maintain their market share of comparison expenditure in the future.
- 3.43 Available comparison goods expenditure has been projected forward to 2021, 2026 and 2031 based on 2016 penetration rates (ie. assuming that comparison retail facilities will maintain their current market share) in Tables 6, 7 and 8 in Appendix 3, and summarised in Table 10. Available comparison expenditure to facilities within the District is expected to increase from £459.55 million in 2016 to £819.06 million in 2031.
- 3.44 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2016 (ie. satisfactory levels). Table 10 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, as recommended by Experian. This growth will help to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency.
- 3.45 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 4, adopting average sales densities in 2016 of £6,000 per sq.m, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 24,838 sq.m net of comparison sales floorspace (33,118 sq.m gross).
- 3.46 The TCRLCT 2012 retail capacity assessment suggested a marginally higher figure of 34,300 sq.m gross would be required within Thanet by 2031.
- 3.47 The floorspace projections are summarised in Table 3.3 below.

Table 3.3: Comparison Goods Floorspace Projections

Centre	Floorspace (sq.m gross)		
	By 2021	By 2026	By 2031
Margate/Cliftonville	556	1,487	2,491
Westwood Cross	5,056	13,513	22,638
Broadstairs/St Peters	644	1,721	2,883
Ramsgate	845	2,259	3,785
Birchington/Westgate	273	729	1,221
Other Thanet	22	59	99
District Total	7,396	19,768	33,118

Source: Table 11, Appendix 3

3.48 Since the previous study was undertaken, comparison goods floorspace has been built, comprising the additional non-food floorspace at the Sainsbury's store (3,427 sq.m net as noted above). In addition, this scheme included a non-food retail unit of 1,858 sq.m (GIA), plus outline permission for 8,872 sq.m (GIA) of non-food retail floorspace. New Primark (6,510 sq.m GIA) and DFS (2,230 sq.m GIA) units have also opened at Westwood Cross. These stores, together with the consented non-food retail units, would absorb the majority of the identified floorspace capacity at Westwood Cross over the study period.

3.49 The Tesco scheme at the Arlington site, Margate also includes 1,544 sq.m net comparison goods floorspace, together with comparison unit shops with a net sales area of 399 sq.m. If implemented, this would absorb a significant proportion of the identified floorspace requirements for Margate. In addition, the development at New Haine Road, Ramsgate, referred to above, could include an element of non-food retail floorspace within the new local centre.

Qualitative Need

3.50 The assessment in this section quantifies the theoretical capacity to support new retail floorspace within Thanet, based on the population projections and growth in expenditure. The qualitative need for retail facilities also needs to be considered.

3.51 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as under-served markets; and
- the quality of existing provision.

3.52 As indicated in Section 2, the retail hierarchy in Thanet comprises Westwood Cross, followed by the three smaller town centres of Margate, Ramsgate and Broadstairs. Westwood caters for higher order retail needs, while the town centres play a more specialist role, offering a wider range of independent shops and services. These centres are supported by four district centres and a number of local centres, catering for more local needs and services. The network of centres serves shoppers from the District and also tourist visitors.

Convenience Goods Retailer Representation

3.53 The household survey results indicated that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 81.4% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips.

Large supermarkets or superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip.

- 3.54 Food store provision is set out in Table 9 in Appendix 2. There are four food superstores (2,500 sq.m net or more) in the District ie. Sainsbury's and Tesco Extra at Westwood Cross, Asda, Broadstairs and Tesco, Ramsgate. In addition to these superstores, there are two supermarkets (over 1,500 sq.m net) within the District, ie. Morrisons, Margate and Asda, Ramsgate. The household survey indicates that these large food stores are the dominant shopping destinations used by residents in the District for main/bulk food shopping.
- 3.55 The larger food stores are supported by a good range of smaller supermarkets and convenience stores. The discount food sector is represented by Lidl stores in Westwood Cross and Ramsgate, and Aldi stores in Margate and Ramsgate. Food stores within the District are supported by small independent convenience shops located within the main and local centres.
- 3.56 Residents in the District have excellent access to a choice of food stores and convenience shops.

Comparison Goods Retailer Representation

- 3.57 Westwood Cross is the main high street comparison shopping destination and the highest ranking centre within the District. Ramsgate and to a lesser extent Margate also provide residents with comparison shopping destinations. However, the Thanet centres are ranked below other larger centres surrounding the District, in particular Canterbury, which is accessible to residents within the District and has a much more extensive range of multiple retailers than Westwood Cross, Ramsgate, Margate and the other centres in Thanet.
- 3.58 Westwood Cross has a particularly high proportion of comparison retail units within the centre, and provides a good range of primarily national multiple retailers, including Debenhams, Marks & Spencer, and more recently, Primark.
- 3.59 The smaller town centres have a more limited comparison retail offer. Margate has a reasonable range and choice of national multiple and independent comparison retailers. The national multiples are generally focused along the High Street and the independent retailers within Margate Old Town. In Ramsgate there is a good range of comparison retailers, although a limited number of national multiple retailers and no main anchor comparison retailer. The comparison offer within Broadstairs is typically smaller, high end independent retailers. There are few national multiple retailers, although this is not to the detriment of the town which has developed as a niche high quality seaside town with a unique character.
- 3.60 The main retail warehouse representation is at Westwood Retail Park and Westwood Gateway Retail Park, with representation from a number of major national multiple retailers that are usually found in retail warehouse parks,

including Homebase, Matalan, PC World and Carpetright. This is considered to serve the District well, and there is no qualitative need to provide for any significant new retail warehouse development.

4.0 Other Town Centre Uses

Service Uses

4.1 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. The current UK average for Goad (April 2016) town centres indicates that 15.2% of units are in Class A3/A5 (restaurants, café and takeaway) and 4.5% of units are Class A4 (public houses/bars). A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

4.2 The 2012 TCRLTC indicated that the proportions of Class A3/A4/A5 within the District's centres are generally lower than the national average.

Food and Beverage Expenditure

4.3 Experian's latest 2014 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2 in Appendix 4. The total food and beverage expenditure in the study area is £145 million at 2016. Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 22.8% between 2016 and 2031. Taking into account population growth, total food and beverage expenditure within the study area is expected to increase from £144.99 million in 2016 to £203.09 million in 2031 (Table 3 in Appendix 4).

4.4 Existing food and beverage expenditure patterns have been modelled based on the 2012 household survey results. The penetration rates are shown in Table 4 in Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Thanet is £146.34 million in 2016.

4.5 Table 9 in Appendix 4 identifies that there is around 21,400 sq.m gross of food and beverage floorspace within the District.

Future Food and Beverage Capacity

4.6 Available food and beverage expenditure has been projected forward to 2031 based on existing market shares in Tables 6 to 8 in Appendix 4. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 10 in Appendix 4.

4.7 Surplus expenditure has been converted into floorspace projections in Table 15 in Appendix 4, using an average sales density of £5,000 in 2016, inflated by 1% per annum. The floorspace projections are broken down in Table 4.1 below.

Table 4.1: Food and Beverage Floorspace Projections

Centre	Floorspace (sq.m gross)		
	By 2021	By 2026	By 2031
Margate/Cliftonville	219	454	691
Westwood Cross	401	831	1,265
Broadstairs/St Peters	516	1,069	1,627
Ramsgate	404	837	1,275
Birchington/Westgate	176	365	556
Other Thanet	199	413	629
District Total	1,915	3,970	6,043

Source: Table 11 in Appendix 4

Commercial Leisure Uses

- 4.8 This section assesses the potential for commercial leisure uses including cinema/multiplex, tenpin bowling, bingo, nightclubs, casinos, family leisure facilities and private health and fitness clubs.
- 4.9 Residents in Thanet have good access to a range of commercial leisure and entertainment and most of the key sectors are represented.

Cinemas

- 4.10 There is one large national cinema and three smaller independent cinemas in Thanet, i.e. the Vue in Westwood Cross, the Carlton Cinema in Westgate, the Granville Theatre and Cinema in Ramsgate and the Palace Cinema in Broadstairs. Together, the cinemas provide 16 screens and 2,554 seats.
- 4.11 The study area population in 2016 (140,516 people) will generate around 393,400 cinema trips per annum, based on the national average visitation rate (2.8 trips per annum). Based on the national average population per cinema screen (47,000 trips per screen), 393,400 trips generates demand for 8 cinema screens. In terms of seats, the national average (230 trips per seat) suggests 393,000 trips could support around 1,700 seats. The existing cinemas in Thanet have 16 screens and 2,554 seats, which indicates that provision within the District is sufficient.
- 4.12 Based on national average visitation rates, Thanet's population at 2031 (160,245) would generate demand for 10 cinema screens or 1,950 seats.
- 4.13 There is no need for further cinema facilities within Thanet over the study period.

Health and Fitness Clubs

- 4.14 The UK health club market has expanded rapidly as public awareness about personal fitness has increased. The value of the UK fitness market is now

around £4 billion. Private health clubs in the UK range from small independent clubs to large operators such as Virgin Active, David Lloyd, Esporta, Fitness First, Bannatyne and LA Fitness. Public sector sports centres are also important, and the market has increased significantly over the last 10 years.

- 4.15 The Sport England/Active Places data indicates there are 11 health and fitness suites in the District, of which five are for private use. These private uses facilities are relatively small, with 77 fitness stations in total. There are three suites open to the general public with 150 fitness stations as shown below.
- 4.16 Thanet's population is 140,516 in 2016, and Thanet's Strategic Housing Market Assessment (2016) suggests the population will grow to 160,245 by 2031. Thanet currently has 3.7 fitness stations per 1,000 people (523 stations in total).
- 4.17 Kent has 187 Sport England registered health and fitness suites with 8,345 fitness stations (average of 45 stations per suite). This existing provision equates to 5.5 fitness stations per 1,000 people in Kent.
- 4.18 If Thanet had the same provision per head of population as the Kent average then the number of fitness stations would be 773, which implies an existing under-supply of 250 stations.

Table 4.1: Thanet Health and Fitness Clubs (Active Places Data 2016)

Name	Type	Fitness Stations
Bannatynes Health Club (Broadstairs)	Registered membership use	144
Beach Body Fitness (Birchington)	Pay and Play	19
Dane Court Grammar School (Broadstairs)	Private Use	7
DW Sports Fitness (Broadstairs)	Registered membership use	120
Elite Fitness Studio (Broadstairs)	Registered membership use	32
Hartsdown Sports & Leisure Centre (Margate)	Pay and Play	70
King Ethelbert School (Birchington)	Private Use	20
Ramsgate Leisure Centre (Ramsgate)	Pay and Play	61
St Georges C Of E School (Broadstairs)	Private Use	16
St Lawrence College (Ramsgate)	Private Use	18
The Charles Dickens School (Broadstairs)	Private Use	16
Total		523

- 4.19 If Thanet continued to provide 3.7 stations per 1,000 people, the projected supply of fitness stations to meet future demand would be 21 additional stations in 2021, 46 additional stations in 2028 and 69 in 2031 due to population growth. This equates to up to two new health and fitness suites over the plan period.
- 4.20 If Thanet were to increase the provision to be in line with the Kent average of 5.5 fitness stations per 1,000 people, to meet future demand arising from population growth would require an additional 358 stations by 2031, or around eight new health and fitness suites over the plan period.

Tenpin Bowling

- 4.21 There is currently one tenpin bowling centre in Thanet, Buggy's, located in Margate which has 12 lanes. AMF Bowling, which was also in Margate, has closed down. Thanet's population (140,516 in 2016) can support 12 lanes, based on one lane per 12,000 people (national average). The population at 2031 (160,245) could support 13 lanes. On this basis, the current facility is considered sufficient to meet the needs of residents and there is a limited requirement to plan for additional bowling facilities. However, these facilities are also likely to serve tourists and people visiting the area, in addition to local residents.

Bingo

- 4.22 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).
- 4.23 There are currently two Bingo halls in Thanet – Mecca Bingo at Westwood Cross and Beacon Bingo in Margate. The adult (over 18) population of Thanet (117,000 in 2016) could generate around 164,000 admissions based on the national participation rate (1.4 trips per adult). Based on national average figures (133,000 admissions per club), there is no requirement for additional Bingo Halls in the District. However, again, these facilities are likely to serve tourists and people visiting the area, in addition to local residents.

Casinos

- 4.24 There were 148 licensed casinos operating in Great Britain at March 2015. Two companies own the majority of casinos in the sector, namely Rank Group (Grosvenor Casinos and 'G' Casinos) with 63 casinos, and Genting UK (Genting Casinos/Clubs) with 41 casinos.
- 4.25 There are two casinos in Thanet – Genting Casino in Margate and Grosvenor Casino in Westwood Cross. This equates to one casino per 58,500 of the adult population. There is therefore not considered to be a requirement for any additional casinos to serve the local population or tourist visitors.

Family Leisure

- 4.26 The District has a number of facilities catering for family leisure including an amusement park – Dreamland in Margate, roller skating clubs, amusement arcades and various indoor fun activity zones. Dreamland has reopened

following its closure in 2003 and significant investment, and is Thanet's destination amusement park.

4.27

Thanet currently has a number of amusement arcades within the District, primarily around the sea front areas. Amusement arcades are typically found in seaside resorts and cater primarily for the tourist market.

5.0 Accommodating Future Growth

- 5.1 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development, which is supported by policies within the Local Plan. The preferred location for retail and leisure development needs to be carefully considered, particularly for major development which may have an extensive catchment area. Some facilities will be needed to serve more localised catchment areas and some development will be more appropriate within district and local centres. All development should be appropriate in terms of scale and nature to the centre in which it is located.
- 5.2 The existing stock of premises may have a role to play in accommodating projected growth. The capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace and 1% for food and beverage floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 5.3 The 2012 TCRLTC Assessment identified that there was a combined total of 170 vacant shop units within the four centres of Westwood Cross, Ramsgate, Margate and Broadstairs, which equates to an overall vacancy rate of 19.8%, which is higher than the Goad national average (11.7%, April 2016). The vacancy rate was significantly higher in Ramsgate and Margate at 22.2% and 31.9% respectively, compared to Westwood Cross (6.6%) and Broadstairs (8.5%). The total amount of vacant floorspace was estimated to be approximately 24,520 sq.m gross.
- 5.4 Vacant premises should help to accommodate future growth. For example, if the vacancy level fell from 19.8% to the national average of 11.7%, then the reoccupation of around 70 vacant properties could be achieved. This reoccupied space could accommodate around 10,100 sq.m gross of commercial floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:
- **Westwood Cross:** 670 sq.m gross;
 - **Ramsgate:** 4,480 sq.m gross;
 - **Margate:** 4,120 sq.m gross; and
 - **Broadstairs:** 830 sq.m gross.
- 5.5 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2021 would be met in full. The total Class A1-A5 floorspace requirement for the District in 2031 would reduce from around 42,500 sq.m gross to around 32,400 sq.m gross. If this reduction in vacant units can be achieved this would reduce the need for new floorspace to be provided through development.

- 5.6 The existing vacant units are generally small and may not be attractive to retailers seeking modern units. It therefore may be more likely that the vacant units would be reoccupied for non A1 retail uses, and the Council should take a flexible approach to application for the change of use of vacant retail units where this could improve activity and investment in the town centres, particularly in Margate and Ramsgate where the vacancy levels are highest.

Potential Development Opportunities

- 5.7 The 2012 TRCLTC Assessment reviewed the potential for the centres within Thanet to accommodate the identified retail, leisure and other town centre uses requirements arising from the capacity assessment.

Westwood Cross

- 5.8 Westwood Cross currently performs as the main centre within Thanet district. Its position should be strengthened in the future to retain expenditure within the District and maintain its market share, preventing leakage to higher order centres outside ie. Canterbury and to new developments elsewhere such as Dover town centre.
- 5.9 Following the development of the larger Sainsbury's store, there is no requirement for any additional convenience goods floorspace at Westwood Cross up to 2031. There is an identified need for 22,638 sq.m of comparison goods floorspace by 2031. However, the recently developed Primark and DFS units, together with the consented non-food retail units would absorb the majority of this identified comparison goods floorspace requirement over the study period. A requirement for up to 1,265 sq.m gross of food and beverage floorspace is identified by 2031.
- 5.10 The comparison floorspace commitments should provide a range of unit sizes to attract a mix of primarily national multiple retail operators to help enhance the centre's overall vitality and viability and to maintain its position at the top of the retail hierarchy in Thanet.
- 5.11 The centre should focus on encouraging additional retail service uses, to help it fulfil its function as the main centre within the District and support the main retail function of the centre. Such complementary uses include high street banks, hairdressers and beauty salons, estate agents, travel agents, in addition to food and beverage floorspace within cafés, restaurants and takeaways.

Ramsgate

- 5.12 The strategy moving forward should be to consolidate Ramsgate's retail provision to reverse the relative decline in the centre.
- 5.13 There is capacity within Ramsgate for 1,304 sq.m gross of convenience goods floorspace up to 2031. However there is a floorspace deficit at Westwood

Cross and other parts of Thanet, which may reduce the convenience goods capacity projection in Ramsgate to 992 sq.m gross by 2031.

- 5.14 The comparison goods floorspace projection up to 2031 is 3,785 sq.m, and 1,275 sq.m gross for food and beverage floorspace. Within the town centre, the focus in the short term should be on reoccupation of vacant floorspace.
- 5.15 The proposed new development at New Haine Road, Ramsgate, that includes up to 2,000 sq.m retail floorspace (Class A1, A2 and A3), would absorb around half of the identified floorspace requirements for Ramsgate up to 2031.
- 5.16 To enhance the centre's vitality and viability the strategy should consolidate the retail provision to a tighter geographical area, with some limited redevelopment to provide larger format retail units to encourage some national multiple retailers. A small scale anchor department store could be planned for to enhance further the performance of Ramsgate as a secondary retail destination behind Westwood Cross.
- 5.17 With the marina, Ramsgate provides an attractive environment and this should be promoted to help enhance Ramsgate as a destination in the District. Additional restaurants and cafes along sea front should be planned for to meet local needs and make more of a leisure destination.
- 5.18 In addition to retail uses, Ramsgate could plan to enhance its visitor offer, including through the provision of more leisure and facilities where opportunities arise, to serve both local residents and to improve the tourism attraction of the town.

Margate

- 5.19 Margate has declined considerably over the years and there is a concerted focus to help enhance its vitality and viability. However, while the retail role of Margate has declined, it still has an important role to play in meeting local retail needs.
- 5.20 There is available capacity for 1,035 sq.m gross of convenience goods floorspace in Margate. However there is a floorspace deficit at Westwood Cross and other parts of Thanet, which may reduce the convenience goods capacity projection in Margate to 787 sq.m gross by 2031.
- 5.21 The comparison goods floorspace projection up to 2031 is 2,491 sq.m, and 691 sq.m gross for food and beverage floorspace. This should be directed to the south or east of the centre to meet a deficit in provision for local residents.
- 5.22 The Tesco superstore at the Arlington site, Margate, which was granted on appeal, includes a store with a total net sales area of 4,052 sq.m, comprising 2,508 sq.m net convenience goods floorspace and 1,544 sq.m net comparison goods floorspace, together with comparison unit shops with a net sales area of 399 sq.m. If implemented, this scheme would absorb the majority of the floorspace capacity identified for Margate.

- 5.23 The focus should be on reducing the retail core of the centre to encourage a wider range of uses within the centre, so it performs more than a local shopping role ie. for additional leisure and tourism uses. Margate Old Town is trying to buck the trend of the High Street, with the presence of higher quality smaller, independent niche shops as opposed to lower end national multiples and a lower proportion of vacant units, and a retail core focused within this area should provide an more attractive and vital centre.
- 5.24 Margate should continue to enhance its niche role as a cultural destination, which has been established through the development of the Turner Contemporary gallery. Additional arts and cultural facilities should be directed towards Margate, and the regeneration of the Dreamland site has assisted in meeting the Council's aspirations to further increase tourist numbers to Margate.

Broadstairs

- 5.25 The coastal town of Broadstairs plays an important role in serving local needs and for tourists. It is currently the strongest coastal town in terms of its vitality and viability and the strategy should be to build on its strengths and continue to promote the centre as a higher end tourist destination.
- 5.26 The retail capacity projections forecast an additional 968 sq.m gross of convenience goods floorspace, which allowing for the floorspace deficit elsewhere in Thanet would reduce to 737 sq.m gross.
- 5.27 There is capacity for 2,883 sq.m gross of comparison goods floorspace and 1,627 sq.m of food and beverage floorspace up to 2031. There is limited physical scope to expand or develop the centre. The focus on Broadstairs should be on maintaining the existing centre and small scale extensions and/or intensifications.

6.0 **Conclusions**

- 6.1 This report provides an update of the District wide needs assessment for retail and leisure development in Thanet and should be read alongside the TCRLTC Assessment 2012. The conclusions of the analysis contained within this study are summarised below.

Meeting Shopping and Leisure Needs

- 6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period.
- 6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.
- 6.4 Long term forecasts beyond 2021 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2021 is attributable to projected growth in spending per capita as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major developments surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Thanet.

Class A Retail Floorspace Projections

- 6.5 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Thanet.
- 6.6 The projections suggest new floorspace should be distributed and phased as shown in Tables 6.1, 6.2 and 6.3 below.

Table 6.1: Convenience Goods Retail Floorspace Projections

Centre	Additional Floorspace (sq.m gross)			
	2016 - 2021	2021 - 2026	2026 - 2031	Total
Margate/Cliftonville	-	279	268	787
Westwood Cross	-	-	-	-
Broadstairs/St Peters	-	230	338	737
Ramsgate	-	324	414	992
Birchington/Westgate	-	-	-	-
Other Thanet	-	-	-	-
District Total	-	833	1,683	2,516

Source: Table 11, Appendix 2

Note: Negative floorspace requirement redistributed on a pro-rata basis

Table 6.2: Comparison Goods Retail Floorspace Projections

Centre	Additional Floorspace (sq.m gross)			
	2016 - 2021	2021 - 2026	2026 - 2031	Total
Margate/Cliftonville	556	931	1,004	2,491
Westwood Cross	5,056	8,457	9,125	22,638
Broadstairs/St Peters	644	1,077	1,162	2,883
Ramsgate	845	1,414	1,526	3,785
Birchington/Westgate	273	456	492	1,221
Other Thanet	22	37	40	99
District Total	7,396	12,372	13,349	33,117

Source: Table 11, Appendix 3

Table 6.3: Food and Beverage (A3/A4/A5) Retail Floorspace Projections

Centre	Additional Floorspace (sq.m gross)			
	2016 - 2021	2021 - 2026	2026 - 2031	Total
Margate/Cliftonville	219	235	237	691
Westwood Cross	401	430	434	1,265
Broadstairs/St Peters	516	553	558	1,627
Ramsgate	404	433	438	1,275
Birchington/Westgate	176	189	191	556
Other Thanet	199	214	216	629
District Total	1,915	2,054	2,074	6,043

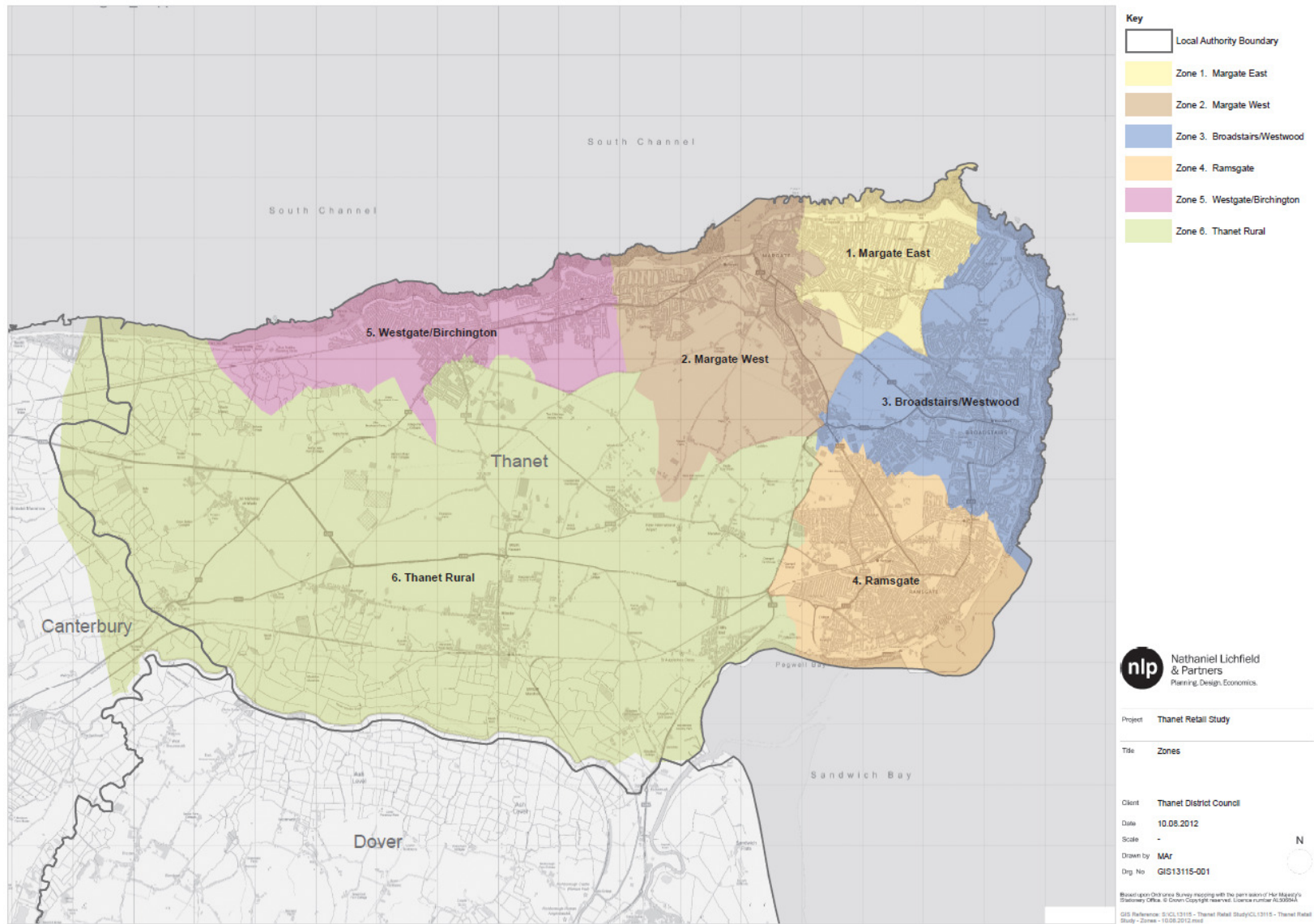
Source: Table 11, Appendix 4

- 6.7 The revised retail capacity projections suggest there is scope for up to around 42,500 sq.m gross Class A1 to A5 retail floorspace in Thanet District as a whole by 2031, of which 10,100 sq.m gross could be accommodated in vacant floorspace. Convenience retail commitments within the District, if implemented, would absorb all of the capacity for convenience goods floorspace in the District as a whole. If the comparison retail commitments are implemented, together with the recently completed floorspace, these would absorb the majority of the identified floorspace capacity at Westwood Cross over the study period and a significant proportion of the identified floorspace requirements for Margate. In addition, the development at New Haine Road, Ramsgate, referred to above, could include up to 2,000 sq.m retail (Class A1, A2 and A3) floorspace within the new local centre.

Commercial Leisure

- 6.8 Residents in Thanet have good access to a range of commercial leisure and entertainment, including facilities that serve the needs of tourist visitors in addition to the resident population. The commercial leisure assessment concludes:
- there is no requirement to plan for additional cinema provision over the study period – the existing facilities are considered sufficient to meet the needs of both residents and also serve tourist visitors;
 - based on the current level of provision of health and fitness facilities per person, due to population growth, there would be a requirement for up to two new health and fitness suites over the period to 2031. If the aim is to increase provision to be in line with the Kent average, this would lead to a requirement for around eight additional health and fitness suites by 2031. Such facilities are not generally used by the tourist population;
 - the current tenpin facility is considered sufficient to meet the needs of residents and there is a limited requirement to plan for additional bowling facilities. However, we note that a separate bowling facility has closed down since the 2012 TCRLTC and it may be desirable to seek its replacement. These facilities are likely to serve tourists and people visiting the area, in addition to local residents;
 - the provision of bingo facilities per resident population is broadly in line with the national average and the existing facilities are considered sufficient to meet the needs of local residents, and these facilities are likely to serve tourists and people visiting the area, in addition to local residents;
 - there is no requirement to plan for additional casinos over the study period – the existing facilities are considered sufficient to meet the needs of both residents and tourists;
 - there is currently a good range and number of facilities catering for family leisure in the District, particularly Dreamland in Margate. The provision of additional family leisure facilities could enhance the overall visitor experience for local residents and tourists.

Appendix 1 Study Area and Methodology



Retail Capacity Assessment – Methodology and Data

Price Base

- 1 All monetary values expressed in this study are at 2014 prices, consistent with Experian's base year expenditure figures for 2014 (Retail Planner Briefing Note 13, October 2015) which is the most up to date information available.

Retail Expenditure

- 2 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2014 have been obtained.
- 3 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 13) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.
- 4 Experian's EBS growth forecast rates for 2014 to 2017 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2014 to 2015, +0.1% for 2015 to 2016 and +0.3% for 2017; for comparison goods: +5.3% for 2014-2015, +3.2% for 2015-2016 and +2.9% for 2017).
- 5 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2017 and 3% per annum growth for comparison goods after 2017 increasing to 3.2% after 2022. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.
- 6 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing

- in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2014 is:
- 8.3% of convenience goods expenditure; and
 - 14.9% of comparison goods expenditure.
- 7 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2014 are:
- 2.5% of convenience goods expenditure; and
 - 11.2% of comparison goods expenditure.
- 8 The projections provided by Experian suggest that these percentages could increase to 4.7% and 15.1% by 2022 respectively, and estimated at 5.8% and 14.6% by 2031. These figures have been adopted in this assessment.
- 9 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 10 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after about 2023. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.9% by 2022, rising to only 19.4% by 2031.
- 11 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

- 12 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the July 2012 household survey.
- 13 The total turnover of shops within Thanet is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

- 14 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 15 Changes in convenience goods sales areas since the 2012 Town Centre Retail, Leisure, Tourism and Culture Assessment have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and the Council's land use surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.
- 16 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Thanet and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £6,000 per sq.m net for convenience shops/stores in the study area. The total benchmark turnover of identified convenience sales floorspace within Thanet is £354.59 million (Tables 9 Appendix 2).
- 17 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. Based on NLP's experience, the average sales density for high street comparison retailers usually ranges between £5,000 to £8,000 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Population Projections

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,791	22,818	23,883	24,983	26,022
Zone 2: Margate West	21,519	22,534	23,585	24,671	25,697
Zone 3: Broadstairs/Westwood	24,948	26,124	27,343	28,602	29,792
Zone 4: Ramsgate	40,325	42,226	44,197	46,232	48,155
Zone 5: Westgate/Birchington	14,942	15,647	16,377	17,131	17,843
Zone 6: Thanet Rural	10,664	11,167	11,688	12,226	12,735
Total	134,189	140,516	147,073	153,845	160,245

Sources: ONS and Thanet Strategic Housing Market Assessment (2016)

Table 2: Convenience Goods Expenditure Per Capita

Expenditure Per Capita	2016	2021	2026	2031
Zone 1: Margate East	£1,980	£1,965	£1,960	£1,956
Zone 2: Margate West	£2,037	£2,022	£2,017	£2,012
Zone 3: Broadstairs/Westwood	£2,296	£2,278	£2,273	£2,268
Zone 4: Ramsgate	£2,012	£1,997	£1,992	£1,987
Zone 5: Westgate/Birchington	£2,257	£2,240	£2,235	£2,229
Zone 6: Thanet Rural	£2,315	£2,298	£2,292	£2,287

Sources:

Experian local estimates for 2014 convenience goods expenditure per capita (2014 prices)

Growth Rates: -0.2% 2014-2015, 0.1% 2015-2016, 0.3% 2016-2017 and 0.1% p.a. from 2017

Excludes Special Forms of Trading

Table 3: Total Available Convenience Goods Expenditure (£m)

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£45.17	£46.93	£48.97	£50.89	3.9%	8.4%	12.6%
Zone 2: Margate West	£45.90	£47.68	£49.76	£51.70	3.9%	8.4%	12.6%
Zone 3: Broadstairs/Westwood	£59.97	£62.30	£65.01	£67.56	3.9%	8.4%	12.6%
Zone 4: Ramsgate	£84.95	£88.24	£92.09	£95.69	3.9%	8.4%	12.6%
Zone 5: Westgate/Birchington	£35.31	£36.68	£38.28	£39.78	3.9%	8.4%	12.6%
Zone 6: Thanet Rural	£25.85	£26.85	£28.02	£29.12	3.9%	8.4%	12.6%
Total	£297.15	£308.68	£322.14	£334.73	3.9%	8.4%	12.6%

Sources: Table 1 and Table 2

Table 4: Base Year Convenience Goods Market Shares (%)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Morrisons, College Walk, Margate	12.2%	21.0%	0.6%	0.0%	4.6%	1.9%	10.0%
Aldi, Zion Place, Margate	7.8%	3.7%	0.4%	0.0%	5.2%	0.5%	5.0%
Other Margate	3.3%	11.7%	0.5%	0.0%	3.2%	0.7%	5.0%
Tesco Metro, Northdown Road, Cliftonville	22.6%	1.9%	1.4%	0.2%	0.8%	0.0%	5.0%
Cliftonville	3.4%	0.3%	0.4%	0.0%	0.0%	0.7%	5.0%
Other Zones 1/2	0.3%	2.6%	0.0%	0.1%	0.0%	0.7%	5.0%
Margate/Cliftonville Sub-Total	49.6%	41.2%	3.3%	0.3%	13.8%	4.5%	
Tesco Extra, Margate Road	22.3%	19.4%	21.6%	13.7%	16.7%	10.6%	20.0%
Sainsbury's, Margate Road	7.6%	11.3%	16.6%	7.2%	14.5%	7.7%	20.0%
Marks & Spencer, Westwood Cross	0.8%	1.5%	0.7%	1.6%	1.6%	2.0%	20.0%
Other Westwood Cross	0.3%	0.0%	0.0%	0.5%	0.4%	0.0%	20.0%
Westwood Cross Sub-Total	31.0%	32.2%	38.9%	23.0%	33.2%	20.3%	
Asda, Westwood Road, Broadstairs	15.0%	17.8%	25.0%	8.6%	7.9%	6.8%	10.0%
Other Broadstairs	1.1%	1.6%	21.0%	0.6%	1.7%	5.0%	5.0%
Other Zone 3	0.3%	0.3%	4.7%	0.0%	0.0%	1.4%	5.0%
Broadstairs Sub-Total	16.4%	19.7%	50.7%	9.2%	9.6%	13.2%	
Tesco, Manston Road, Ramsgate	0.9%	2.2%	0.4%	22.8%	6.7%	14.8%	15.0%
Waitrose, Queen Street, Ramsgate	0.3%	0.2%	1.3%	9.5%	1.3%	2.7%	15.0%
Aldi, Boundary Road, Ramsgate	0.0%	0.0%	1.2%	8.7%	0.0%	1.9%	10.0%
Asda, Chatham Street, Ramsgate	0.3%	0.0%	0.8%	7.6%	0.0%	0.0%	10.0%
Other Ramsgate	1.5%	0.2%	2.9%	18.6%	1.9%	2.0%	5.0%
Ramsgate Sub-Total	3.0%	2.6%	6.6%	67.2%	9.9%	21.4%	
Birchington	0.0%	0.5%	0.0%	0.0%	20.2%	13.5%	5.0%
Westgate	0.0%	3.0%	0.3%	0.0%	10.7%	0.4%	5.0%
Birchington/Westgate Sub-Total	0.0%	3.5%	0.3%	0.0%	30.9%	13.9%	
Other Thanet	0.0%	0.0%	0.0%	0.0%	0.3%	11.5%	5.0%
District Total	100.0%	99.2%	99.8%	99.7%	97.7%	84.8%	
Canterbury	0.0%	0.5%	0.2%	0.2%	1.6%	12.0%	n/a
Dover	0.0%	0.3%	0.0%	0.0%	0.0%	1.8%	n/a
Herne Bay	0.0%	0.0%	0.0%	0.0%	0.7%	0.4%	n/a
Sandwich	0.0%	0.0%	0.0%	0.1%	0.0%	1.0%	n/a
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, July 2012 with NLP adjustments

Table 5: Convenience Expenditure 2016 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	£45.17	£45.90	£59.97	£84.95	£35.31	£25.85		£297.15
Morrisons, College Walk, Margate	£5.51	£9.64	£0.36	£0.00	£1.62	£0.49	£1.96	£19.58
Aldi, Zion Place, Margate	£3.52	£1.70	£0.24	£0.00	£1.84	£0.13	£0.39	£7.82
Other Margate	£1.49	£5.37	£0.30	£0.00	£1.13	£0.18	£0.45	£8.92
Tesco Metro, Northdown Road, Cliftonville	£10.21	£0.87	£0.84	£0.17	£0.28	£0.00	£0.65	£13.02
Cliftonville	£1.54	£0.14	£0.24	£0.00	£0.00	£0.18	£0.11	£2.20
Other Zones 1/2	£0.14	£1.19	£0.00	£0.08	£0.00	£0.18	£0.08	£1.68
Margate/Cliftonville Sub-Total	£22.41	£18.91	£1.98	£0.25	£4.87	£1.16	£3.64	£53.23
Tesco Extra, Margate Road	£10.07	£8.90	£12.95	£11.64	£5.90	£2.74	£13.05	£65.26
Sainsbury's, Margate Road	£3.43	£5.19	£9.96	£6.12	£5.12	£1.99	£7.95	£39.75
Marks & Spencer, Westwood Cross	£0.36	£0.69	£0.42	£1.36	£0.56	£0.52	£0.98	£4.89
Other Westwood Cross	£0.14	£0.00	£0.00	£0.42	£0.14	£0.00	£0.18	£0.88
Westwood Cross Sub-Total	£14.00	£14.78	£23.33	£19.54	£11.72	£5.25	£22.16	£110.78
Asda, Westwood Road, Broadstairs	£6.78	£8.17	£14.99	£7.31	£2.79	£1.76	£4.64	£46.44
Other Broadstairs	£0.50	£0.73	£12.59	£0.51	£0.60	£1.29	£0.85	£17.08
Other Zone 3	£0.14	£0.14	£2.82	£0.00	£0.00	£0.36	£0.18	£3.64
Broadstairs Sub-Total	£7.41	£9.04	£30.41	£7.82	£3.39	£3.41	£5.68	£67.15
Tesco, Manston Road, Ramsgate	£0.41	£1.01	£0.24	£19.37	£2.37	£3.83	£4.80	£32.02
Waitrose, Queen Street, Ramsgate	£0.14	£0.09	£0.78	£8.07	£0.46	£0.70	£1.81	£12.04
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.72	£7.39	£0.00	£0.49	£0.96	£9.56
Asda, Chatham Street, Ramsgate	£0.14	£0.00	£0.48	£6.46	£0.00	£0.00	£0.79	£7.86
Other Ramsgate	£0.68	£0.09	£1.74	£15.80	£0.67	£0.52	£1.03	£20.52
Ramsgate Sub-Total	£1.36	£1.19	£3.96	£57.08	£3.50	£5.53	£9.38	£82.00
Birchington	£0.00	£0.23	£0.00	£0.00	£7.13	£3.49	£0.57	£11.42
Westgate	£0.00	£1.38	£0.18	£0.00	£3.78	£0.10	£0.29	£5.72
Birchington/Westgate Sub-Total	£0.00	£1.61	£0.18	£0.00	£10.91	£3.59	£0.86	£17.15
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.11	£2.97	£0.16	£3.24
District Total	£45.17	£45.53	£59.85	£84.69	£34.50	£21.92	£41.87	£333.54
Canterbury	£0.00	£0.23	£0.12	£0.17	£0.56	£3.10	n/a	£4.19
Dover	£0.00	£0.14	£0.00	£0.00	£0.00	£0.47	n/a	£0.60
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.25	£0.10	n/a	£0.35
Sandwich	£0.00	£0.00	£0.00	£0.08	£0.00	£0.26	n/a	£0.34
Total	£45.17	£45.90	£59.97	£84.95	£35.31	£25.85		£339.03

Table 6: Convenience Expenditure 2021 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2021	£46.93	£47.68	£62.30	£88.24	£36.68	£26.85		£308.68
Morrisons, College Walk, Margate	£5.73	£10.01	£0.37	£0.00	£1.69	£0.51	£2.03	£20.34
Aldi, Zion Place, Margate	£3.66	£1.76	£0.25	£0.00	£1.91	£0.13	£0.41	£8.12
Other Margate	£1.55	£5.58	£0.31	£0.00	£1.17	£0.19	£0.46	£9.26
Tesco Metro, Northdown Road, Cliftonville	£10.61	£0.91	£0.87	£0.18	£0.29	£0.00	£0.68	£13.53
Cliftonville	£1.60	£0.14	£0.25	£0.00	£0.00	£0.19	£0.11	£2.29
Other Zones 1/2	£0.14	£1.24	£0.00	£0.09	£0.00	£0.19	£0.09	£1.74
Margate/Cliftonville Sub-Total	£23.28	£19.64	£2.06	£0.26	£5.06	£1.21	£3.78	£55.29
Tesco Extra, Margate Road	£10.46	£9.25	£13.46	£12.09	£6.13	£2.85	£13.56	£67.79
Sainsbury's, Margate Road	£3.57	£5.39	£10.34	£6.35	£5.32	£2.07	£8.26	£41.29
Marks & Spencer, Westwood Cross	£0.38	£0.72	£0.44	£1.41	£0.59	£0.54	£1.02	£5.08
Other Westwood Cross	£0.14	£0.00	£0.00	£0.44	£0.15	£0.00	£0.18	£0.91
Westwood Cross Sub-Total	£14.55	£15.35	£24.23	£20.30	£12.18	£5.45	£23.01	£115.07
Asda, Westwood Road, Broadstairs	£7.04	£8.49	£15.57	£7.59	£2.90	£1.83	£4.82	£48.24
Other Broadstairs	£0.52	£0.76	£13.08	£0.53	£0.62	£1.34	£0.89	£17.74
Other Zone 3	£0.14	£0.14	£2.93	£0.00	£0.00	£0.38	£0.19	£3.78
Broadstairs Sub-Total	£7.70	£9.39	£31.59	£8.12	£3.52	£3.54	£5.90	£69.76
Tesco, Manston Road, Ramsgate	£0.42	£1.05	£0.25	£20.12	£2.46	£3.97	£4.99	£33.26
Waitrose, Queen Street, Ramsgate	£0.14	£0.10	£0.81	£8.38	£0.48	£0.73	£1.88	£12.51
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.75	£7.68	£0.00	£0.51	£0.99	£9.93
Asda, Chatham Street, Ramsgate	£0.14	£0.00	£0.50	£6.71	£0.00	£0.00	£0.82	£8.16
Other Ramsgate	£0.70	£0.10	£1.81	£16.41	£0.70	£0.54	£1.07	£21.32
Ramsgate Sub-Total	£1.41	£1.24	£4.11	£59.30	£3.63	£5.75	£9.74	£85.18
Birchington	£0.00	£0.24	£0.00	£0.00	£7.41	£3.63	£0.59	£11.87
Westgate	£0.00	£1.43	£0.19	£0.00	£3.92	£0.11	£0.30	£5.95
Birchington/Westgate Sub-Total	£0.00	£1.67	£0.19	£0.00	£11.33	£3.73	£0.89	£17.81
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.11	£3.09	£0.17	£3.37
District Total	£46.93	£47.30	£62.17	£87.98	£35.84	£22.77	£43.50	£346.48
Canterbury	£0.00	£0.24	£0.12	£0.18	£0.59	£3.22	n/a	£4.35
Dover	£0.00	£0.14	£0.00	£0.00	£0.00	£0.48	n/a	£0.63
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.26	£0.11	n/a	£0.36
Sandwich	£0.00	£0.00	£0.00	£0.09	£0.00	£0.27	n/a	£0.36
Total	£46.93	£47.68	£62.30	£88.24	£36.68	£26.85		£352.18

Table 7: Convenience Expenditure 2026 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2026	£48.97	£49.76	£65.01	£92.09	£38.28	£28.02		£322.14
Morrisons, College Walk, Margate	£5.97	£10.45	£0.39	£0.00	£1.76	£0.53	£2.12	£21.23
Aldi, Zion Place, Margate	£3.82	£1.84	£0.26	£0.00	£1.99	£0.14	£0.42	£8.48
Other Margate	£1.62	£5.82	£0.33	£0.00	£1.22	£0.20	£0.48	£9.67
Tesco Metro, Northdown Road, Cliftonville	£11.07	£0.95	£0.91	£0.18	£0.31	£0.00	£0.71	£14.12
Cliftonville	£1.67	£0.15	£0.26	£0.00	£0.00	£0.20	£0.12	£2.39
Other Zones 1/2	£0.15	£1.29	£0.00	£0.09	£0.00	£0.20	£0.09	£1.82
Margate/Cliftonville Sub-Total	£24.29	£20.50	£2.15	£0.28	£5.28	£1.26	£3.95	£57.70
Tesco Extra, Margate Road	£10.92	£9.65	£14.04	£12.62	£6.39	£2.97	£14.15	£70.75
Sainsbury's, Margate Road	£3.72	£5.62	£10.79	£6.63	£5.55	£2.16	£8.62	£43.09
Marks & Spencer, Westwood Cross	£0.39	£0.75	£0.46	£1.47	£0.61	£0.56	£1.06	£5.30
Other Westwood Cross	£0.15	£0.00	£0.00	£0.46	£0.15	£0.00	£0.19	£0.95
Westwood Cross Sub-Total	£15.18	£16.02	£25.29	£21.18	£12.71	£5.69	£24.02	£120.09
Asda, Westwood Road, Broadstairs	£7.35	£8.86	£16.25	£7.92	£3.02	£1.91	£5.03	£50.34
Other Broadstairs	£0.54	£0.80	£13.65	£0.55	£0.65	£1.40	£0.93	£18.52
Other Zone 3	£0.15	£0.15	£3.06	£0.00	£0.00	£0.39	£0.20	£3.94
Broadstairs Sub-Total	£8.03	£9.80	£32.96	£8.47	£3.67	£3.70	£6.16	£72.80
Tesco, Manston Road, Ramsgate	£0.44	£1.09	£0.26	£21.00	£2.56	£4.15	£5.21	£34.71
Waitrose, Queen Street, Ramsgate	£0.15	£0.10	£0.85	£8.75	£0.50	£0.76	£1.96	£13.05
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.78	£8.01	£0.00	£0.53	£1.04	£10.36
Asda, Chatham Street, Ramsgate	£0.15	£0.00	£0.52	£7.00	£0.00	£0.00	£0.85	£8.52
Other Ramsgate	£0.73	£0.10	£1.89	£17.13	£0.73	£0.56	£1.11	£22.25
Ramsgate Sub-Total	£1.47	£1.29	£4.29	£61.88	£3.79	£6.00	£10.16	£88.89
Birchington	£0.00	£0.25	£0.00	£0.00	£7.73	£3.78	£0.62	£12.38
Westgate	£0.00	£1.49	£0.20	£0.00	£4.10	£0.11	£0.31	£6.21
Birchington/Westgate Sub-Total	£0.00	£1.74	£0.20	£0.00	£11.83	£3.90	£0.93	£18.59
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.11	£3.22	£0.18	£3.51
District Total	£48.97	£49.36	£64.88	£91.81	£37.40	£23.76	£45.39	£361.58
Canterbury	£0.00	£0.25	£0.13	£0.18	£0.61	£3.36	n/a	£4.54
Dover	£0.00	£0.15	£0.00	£0.00	£0.00	£0.50	n/a	£0.65
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.27	£0.11	n/a	£0.38
Sandwich	£0.00	£0.00	£0.00	£0.09	£0.00	£0.28	n/a	£0.37
Total	£48.97	£49.76	£65.01	£92.09	£38.28	£28.02		£367.53

Table 8: Convenience Expenditure 2031 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2031	£50.89	£51.70	£67.56	£95.69	£39.78	£29.12	n/a	£334.73
Morrisons, College Walk, Margate	£6.21	£10.86	£0.41	£0.00	£1.83	£0.55	£2.21	£22.06
Aldi, Zion Place, Margate	£3.97	£1.91	£0.27	£0.00	£2.07	£0.15	£0.44	£8.81
Other Margate	£1.68	£6.05	£0.34	£0.00	£1.27	£0.20	£0.50	£10.05
Tesco Metro, Northdown Road, Cliftonville	£11.50	£0.98	£0.95	£0.19	£0.32	£0.00	£0.73	£14.67
Cliftonville	£1.73	£0.16	£0.27	£0.00	£0.00	£0.20	£0.12	£2.48
Other Zones 1/2	£0.15	£1.34	£0.00	£0.10	£0.00	£0.20	£0.09	£1.89
Margate/Cliftonville Sub-Total	£25.24	£21.30	£2.23	£0.29	£5.49	£1.31	£4.10	£59.96
Tesco Extra, Margate Road	£11.35	£10.03	£14.59	£13.11	£6.64	£3.09	£14.70	£73.51
Sainsbury's, Margate Road	£3.87	£5.84	£11.21	£6.89	£5.77	£2.24	£8.96	£44.78
Marks & Spencer, Westwood Cross	£0.41	£0.78	£0.47	£1.53	£0.64	£0.58	£1.10	£5.51
Other Westwood Cross	£0.15	£0.00	£0.00	£0.48	£0.16	£0.00	£0.20	£0.99
Westwood Cross Sub-Total	£15.77	£16.65	£26.28	£22.01	£13.21	£5.91	£24.96	£124.79
Asda, Westwood Road, Broadstairs	£7.63	£9.20	£16.89	£8.23	£3.14	£1.98	£5.23	£52.31
Other Broadstairs	£0.56	£0.83	£14.19	£0.57	£0.68	£1.46	£0.96	£19.24
Other Zone 3	£0.15	£0.16	£3.18	£0.00	£0.00	£0.41	£0.20	£4.10
Broadstairs Sub-Total	£8.35	£10.19	£34.25	£8.80	£3.82	£3.84	£6.40	£75.65
Tesco, Manston Road, Ramsgate	£0.46	£1.14	£0.27	£21.82	£2.67	£4.31	£5.41	£36.07
Waitrose, Queen Street, Ramsgate	£0.15	£0.10	£0.88	£9.09	£0.52	£0.79	£2.03	£13.56
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.81	£8.32	£0.00	£0.55	£1.08	£10.77
Asda, Chatham Street, Ramsgate	£0.15	£0.00	£0.54	£7.27	£0.00	£0.00	£0.89	£8.85
Other Ramsgate	£0.76	£0.10	£1.96	£17.80	£0.76	£0.58	£1.16	£23.12
Ramsgate Sub-Total	£1.53	£1.34	£4.46	£64.30	£3.94	£6.23	£10.56	£92.36
Birchington	£0.00	£0.26	£0.00	£0.00	£8.04	£3.93	£0.64	£12.87
Westgate	£0.00	£1.55	£0.20	£0.00	£4.26	£0.12	£0.32	£6.45
Birchington/Westgate Sub-Total	£0.00	£1.81	£0.20	£0.00	£12.29	£4.05	£0.97	£19.32
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.12	£3.35	£0.18	£3.65
District Total	£50.89	£51.29	£67.42	£95.40	£38.86	£24.69	£47.17	£375.72
Canterbury	£0.00	£0.26	£0.14	£0.19	£0.64	£3.49	n/a	£4.72
Dover	£0.00	£0.16	£0.00	£0.00	£0.00	£0.52	n/a	£0.68
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.28	£0.12	n/a	£0.39
Sandwich	£0.00	£0.00	£0.00	£0.10	£0.00	£0.29	n/a	£0.39
Total	£50.89	£51.70	£67.56	£95.69	£39.78	£29.12		£381.90

Table 9: Convenience Floorspace and Benchmark Turnover

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience Sales sq.m net	Turnover Density £ per sq.m net	Total Turnover £Million
Margate/Cliftonville					
Aldi, Zion Place, Margate	900	80%	720	£11,557	£8.32
Iceland, College Walk, Margate	480	95%	456	£7,933	£3.62
Morrisons, College Walk, Margate	1,991	85%	1,692	£10,849	£18.36
Tesco Express, Canterbury Road, Margate	226	95%	215	£11,058	£2.37
Other Town Centre Shops	511	100%	511	£6,000	£3.07
Tesco Metro, Northdown Road, Cliftonville	968	90%	871	£11,058	£9.63
Co-op, Summerfield Road, Cliftonville	148	95%	141	£8,903	£1.26
Marks & Spencer, Canterbury Road	111	95%	105	£10,329	£1.09
Farmfoods, Richborough Close, Margate	534	95%	508	£7,000	£3.55
Total	5,869		5,219		£51.26
Westwood Cross					
Marks & Spencer, Westwood Cross	918	100%	918	£10,329	£9.48
Sainsbury's, Dadson Way	7,616	55%	4,189	£11,690	£48.97
Lidl, Margate Road	1,171	80%	937	£4,864	£4.56
Tesco Extra, Margate Road	9,643	60%	5,786	£11,058	£63.98
Other Town Centre Shops	420	100%	420	£6,000	£2.52
Total	19,768		12,249		£129.50
Broadstairs/St Peters					
Asda, Westwood Road, Broadstairs	4,409	70%	3,086	£15,312	£47.25
Iceland, High Street, Broadstairs	383	95%	364	£7,933	£2.88
Tesco Metro, High Street, Broadstairs	331	95%	314	£11,058	£3.47
Other Town Centre Shops	1,113	100%	1,113	£6,000	£6.68
Co-op, Hopeville Avenue, St Peters	609	95%	579	£8,903	£5.15
Co-op, High Street, Broadstairs	245	95%	233	£8,903	£2.07
Total	6,844		5,688		£67.51
Ramsgate					
Aldi, Boundary Road, Ramsgate	950	80%	760	£11,557	£8.79
Asda, Chatham Street, Ramsgate	1,554	70%	1,088	£15,312	£16.66
Co-op, Grange Road, Ramsgate	162	95%	154	£8,903	£1.37
Co-op, Newington Road, Ramsgate	167	95%	159	£8,903	£1.41
Iceland, King Street, Ramsgate	305	95%	290	£7,933	£2.30
Lidl, Margate Road, Ramsgate	1,171	80%	937	£4,864	£4.56
Tesco, Manston Road, Ramsgate	2,759	85%	2,345	£11,058	£25.93
Waitrose, Queen Street, Ramsgate	1,289	95%	1,224	£11,665	£14.28
Tesco Express, Hereson Road, Ramsgate	256	95%	243	£11,058	£2.69
Tesco Express, High Street, Ramsgate	214	95%	204	£11,058	£2.25
Other Town Centre Shops	207	95%	196	£6,000	£1.18
Total	9,034		7,600		£81.41
Birchington/Westgate					
Co-op, Station Road, Birchington	524	95%	498	£8,903	£4.43
Co-op, Station Road, Birchington	485	95%	461	£8,903	£4.10
Co-op, Station Road, Westgate on Sea	241	95%	229	£8,903	£2.04
Other Birchington/Westgate	1,680	100%	1,680	£6,000	£10.08
Total	2,930		2,867		£20.65
Other Thanet					
Co-op, Tothill Street, Minster	148	95%	140	£8,903	£1.25
Other Thanet Local Shops	500	100%	500	£6,000	£3.00
Total	648		640		£4.25
TOTAL	45,093		34,264	£10,349	£354.59

Source: ORC StorePoint 2016, Goad and Verdict

Table 10: Summary of Convenience Shopping Patterns 2016 to 2031 (£Million)

Town	2016	2021	2026	2031
Available Expenditure in District				
Margate/Cliftonville	£53.23	£55.29	£57.70	£59.96
Westwood Cross	£110.78	£115.07	£120.09	£124.79
Broadstairs/St Peters	£67.15	£69.76	£72.80	£75.65
Ramsgate	£82.00	£85.18	£88.89	£92.36
Birchington/Westgate	£17.15	£17.81	£18.59	£19.32
Other Thanet	£3.24	£3.37	£3.51	£3.65
Total	£333.54	£346.48	£361.58	£375.72
Benchmark Turnover of Existing Facilities				
Margate/Cliftonville	£51.26	£51.26	£51.26	£51.26
Westwood Cross	£129.50	£129.50	£129.50	£129.50
Broadstairs/St Peters	£67.51	£67.51	£67.51	£67.51
Ramsgate	£81.41	£81.41	£81.41	£81.41
Birchington/Westgate	£20.65	£20.65	£20.65	£20.65
Other Thanet	£4.25	£4.25	£4.25	£4.25
Total	£354.59	£354.59	£354.59	£354.59
Surplus Expenditure				
Margate/Cliftonville	£1.96	£4.03	£6.44	£8.69
Westwood Cross	-£18.72	-£14.43	-£9.41	-£4.72
Broadstairs/St Peters	-£0.36	£2.25	£5.29	£8.13
Ramsgate	£0.58	£3.76	£7.48	£10.95
Birchington/Westgate	-£3.50	-£2.84	-£2.06	-£1.33
Other Thanet	-£1.01	-£0.88	-£0.74	-£0.60
Total	-£21.05	-£8.11	£6.99	£21.13

Sources: Tables 5 to 9

Table 11: Convenience Floorspace Capacity 2016 to 2031

Town	2016	2021	2026	2031
Turnover Density for New Floorspace £ psm	£12,000	£12,000	£12,000	£12,000
Floorspace (sq.m (net))				
Margate/Cliftonville	164	336	537	725
Westwood Cross	-1,560	-1,202	-784	-393
Broadstairs/St Peters	-30	187	441	678
Ramsgate	48	314	623	913
Birchington/Westgate	-292	-236	-172	-111
Other Thanet	-84	-74	-61	-50
Total	-1,754	-676	583	1,761
Floorspace (sq.m (gross))				
Margate/Cliftonville	234	480	767	1,035
Westwood Cross	-2,229	-1,718	-1,120	-561
Broadstairs/St Peters	-43	268	630	968
Ramsgate	69	448	890	1,304
Birchington/Westgate	-417	-338	-245	-159
Other Thanet	-120	-105	-88	-71
Total	-2,506	-965	833	2,516

Appendix 3 Comparison Goods Capacity

Table 1: Population Projections

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,791	22,818	23,883	24,983	26,022
Zone 2: Margate West	21,519	22,534	23,585	24,671	25,697
Zone 3: Broadstairs/Westwood	24,948	26,124	27,343	28,602	29,792
Zone 4: Ramsgate	40,325	42,226	44,197	46,232	48,155
Zone 5: Westgate/Birchington	14,942	15,647	16,377	17,131	17,843
Zone 6: Thanet Rural	10,664	11,167	11,688	12,226	12,735
Total	134,189	140,516	147,073	153,845	160,245

Sources: ONS and Thanet Strategic Housing Market Assessment (2016)

Table 2: Comparison Goods Expenditure Per Capita

Expenditure Per Capita	2016	2021	2026	2031
Zone 1: Margate East	£2,590	£2,930	£3,441	£4,047
Zone 2: Margate West	£2,700	£3,055	£3,589	£4,220
Zone 3: Broadstairs/Westwood	£3,542	£4,007	£4,707	£5,536
Zone 4: Ramsgate	£2,750	£3,111	£3,654	£4,298
Zone 5: Westgate/Birchington	£3,316	£3,752	£4,407	£5,183
Zone 6: Thanet Rural	£3,643	£4,121	£4,841	£5,694

Sources:

Experian local estimates for 2014 comparison goods expenditure per capita (2014 prices)

Growth Rates: 5.3% 2014-2015, 3.2% 2015-2016, 2.9% 2016-2017, 3.0% p.a. 2017 to 2022 and 3.2% from 2022

Excludes Special Forms of Trading

Table 3: Total Available Comparison Goods Expenditure (£m)

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£59.09	£69.97	£85.98	£105.32	18.4%	45.5%	78.2%
Zone 2: Margate West	£60.85	£72.05	£88.53	£108.46	18.4%	45.5%	78.2%
Zone 3: Broadstairs/Westwood	£92.53	£109.56	£134.63	£164.92	18.4%	45.5%	78.2%
Zone 4: Ramsgate	£116.12	£137.49	£168.95	£206.97	18.4%	45.5%	78.2%
Zone 5: Westgate/Birchington	£51.89	£61.44	£75.50	£92.49	18.4%	45.5%	78.2%
Zone 6: Thanet Rural	£40.68	£48.17	£59.19	£72.51	18.4%	45.5%	78.2%
Total	£421.17	£498.68	£612.78	£750.66	18.4%	45.5%	78.2%

Sources: Table 1 and Table 2

Table 4: Base Year Comparison Market Shares (%)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Margate High Street/Old Town	18.0%	13.9%	4.2%	2.6%	7.1%	3.5%	10.0%
Westwood Cross	59.5%	53.2%	54.7%	47.4%	52.3%	48.1%	30.0%
Broadstairs	5.9%	8.5%	15.7%	8.6%	2.4%	3.9%	10.0%
Ramsgate	3.4%	3.2%	6.6%	27.1%	2.9%	10.4%	10.0%
Birchington/Westgate	0.2%	5.7%	0.9%	1.0%	15.1%	6.6%	5.0%
Other Thanet	0.4%	0.4%	0.1%	0.2%	0.1%	1.1%	5.0%
District Total	87.4%	84.9%	82.2%	86.9%	79.9%	73.6%	
Canterbury	7.6%	11.0%	10.7%	8.4%	15.7%	20.8%	n/a
Dover	0.2%	0.1%	0.4%	0.5%	0.4%	0.7%	n/a
Deal	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	n/a
Herne Bay	0.2%	0.2%	0.1%	0.1%	0.3%	0.6%	n/a
Sandwich	0.2%	0.1%	0.0%	0.2%	0.0%	0.0%	n/a
Other Outside District	4.3%	3.7%	6.5%	3.8%	3.6%	4.3%	n/a
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, July 2012 with NLP adjustments

Table 5: Comparison Expenditure 2016 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	£59.09	£60.85	£92.53	£116.12	£51.89	£40.68		£421.17
Margate High Street/Old Town	£10.64	£8.46	£3.89	£3.02	£3.68	£1.42	£3.46	£34.56
Westwood Cross	£35.16	£32.37	£50.61	£55.04	£27.14	£19.57	£94.24	£314.13
Broadstairs	£3.49	£5.17	£14.53	£9.99	£1.25	£1.59	£4.00	£40.00
Ramsgate	£2.01	£1.95	£6.11	£31.47	£1.50	£4.23	£5.25	£52.52
Birchington/Westgate	£0.12	£3.47	£0.83	£1.16	£7.84	£2.68	£0.85	£16.95
Other Thanet	£0.24	£0.24	£0.09	£0.23	£0.05	£0.45	£0.07	£1.37
District Total	£51.65	£51.66	£76.06	£100.91	£41.46	£29.94	£107.87	£459.55
Canterbury	£4.49	£6.69	£9.90	£9.75	£8.15	£8.46	n/a	£47.45
Dover	£0.12	£0.06	£0.37	£0.58	£0.21	£0.28	n/a	£1.62
Deal	£0.06	£0.00	£0.09	£0.12	£0.05	£0.00	n/a	£0.32
Herne Bay	£0.12	£0.12	£0.09	£0.12	£0.16	£0.24	n/a	£0.85
Sandwich	£0.12	£0.06	£0.00	£0.23	£0.00	£0.00	n/a	£0.41
Other Outside District	£2.54	£2.25	£6.01	£4.41	£1.87	£1.75	n/a	£18.84
Total	£59.09	£60.85	£92.53	£116.12	£51.89	£40.68		£529.03

Table 6: Comparison Expenditure 2021 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2021	£69.97	£72.05	£109.56	£137.49	£61.44	£48.17		£498.68
Margate High Street/Old Town	£12.59	£10.01	£4.60	£3.57	£4.36	£1.69	£4.09	£40.93
Westwood Cross	£41.63	£38.33	£59.93	£65.17	£32.13	£23.17	£111.59	£371.95
Broadstairs	£4.13	£6.12	£17.20	£11.82	£1.47	£1.88	£4.74	£47.37
Ramsgate	£2.38	£2.31	£7.23	£37.26	£1.78	£5.01	£6.22	£62.19
Birchington/Westgate	£0.14	£4.11	£0.99	£1.37	£9.28	£3.18	£1.00	£20.07
Other Thanet	£0.28	£0.29	£0.11	£0.27	£0.06	£0.53	£0.08	£1.63
District Total	£61.15	£61.17	£90.06	£119.48	£49.09	£35.45	£127.72	£544.12
Canterbury	£5.32	£7.93	£11.72	£11.55	£9.65	£10.02	n/a	£56.18
Dover	£0.14	£0.07	£0.44	£0.69	£0.25	£0.34	n/a	£1.92
Deal	£0.07	£0.00	£0.11	£0.14	£0.06	£0.00	n/a	£0.38
Herne Bay	£0.14	£0.14	£0.11	£0.14	£0.18	£0.29	n/a	£1.00
Sandwich	£0.14	£0.07	£0.00	£0.27	£0.00	£0.00	n/a	£0.49
Other Outside District	£3.01	£2.67	£7.12	£5.22	£2.21	£2.07	n/a	£22.30
Total	£69.97	£72.05	£109.56	£137.49	£61.44	£48.17		£626.40

Table 7: Comparison Expenditure 2026 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2026	£85.98	£88.53	£134.63	£168.95	£75.50	£59.19		£612.78
Margate High Street/Old Town	£15.48	£12.31	£5.65	£4.39	£5.36	£2.07	£5.03	£50.29
Westwood Cross	£51.16	£47.10	£73.64	£80.08	£39.49	£28.47	£137.12	£457.05
Broadstairs	£5.07	£7.53	£21.14	£14.53	£1.81	£2.31	£5.82	£58.21
Ramsgate	£2.92	£2.83	£8.89	£45.79	£2.19	£6.16	£7.64	£76.41
Birchington/Westgate	£0.17	£5.05	£1.21	£1.69	£11.40	£3.91	£1.23	£24.66
Other Thanet	£0.34	£0.35	£0.13	£0.34	£0.08	£0.65	£0.10	£2.00
District Total	£75.14	£75.17	£110.66	£146.82	£60.32	£43.56	£156.94	£668.62
Canterbury	£6.53	£9.74	£14.41	£14.19	£11.85	£12.31	n/a	£69.03
Dover	£0.17	£0.09	£0.54	£0.84	£0.30	£0.41	n/a	£2.36
Deal	£0.09	£0.00	£0.13	£0.17	£0.08	£0.00	n/a	£0.47
Herne Bay	£0.17	£0.18	£0.13	£0.17	£0.23	£0.36	n/a	£1.23
Sandwich	£0.17	£0.09	£0.00	£0.34	£0.00	£0.00	n/a	£0.60
Other Outside District	£3.70	£3.28	£8.75	£6.42	£2.72	£2.55	n/a	£27.41
Total	£85.98	£88.53	£134.63	£168.95	£75.50	£59.19		£769.72

Table 8: Comparison Expenditure 2031 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2031	£105.32	£108.46	£164.92	£206.97	£92.49	£72.51		£750.66
Margate High Street/Old Town	£18.96	£15.08	£6.93	£5.38	£6.57	£2.54	£6.16	£61.61
Westwood Cross	£62.67	£57.70	£90.21	£98.10	£48.37	£34.88	£167.97	£559.89
Broadstairs	£6.21	£9.22	£25.89	£17.80	£2.22	£2.83	£7.13	£71.30
Ramsgate	£3.58	£3.47	£10.88	£56.09	£2.68	£7.54	£9.36	£93.61
Birchington/Westgate	£0.21	£6.18	£1.48	£2.07	£13.97	£4.79	£1.51	£30.21
Other Thanet	£0.42	£0.43	£0.16	£0.41	£0.09	£0.80	£0.12	£2.45
District Total	£92.05	£92.08	£135.56	£179.85	£73.90	£53.36	£192.25	£819.06
Canterbury	£8.00	£11.93	£17.65	£17.39	£14.52	£15.08	n/a	£84.57
Dover	£0.21	£0.11	£0.66	£1.03	£0.37	£0.51	n/a	£2.89
Deal	£0.11	£0.00	£0.16	£0.21	£0.09	£0.00	n/a	£0.57
Herne Bay	£0.21	£0.22	£0.16	£0.21	£0.28	£0.44	n/a	£1.51
Sandwich	£0.21	£0.11	£0.00	£0.41	£0.00	£0.00	n/a	£0.73
Other Outside District	£4.53	£4.01	£10.72	£7.86	£3.33	£3.12	n/a	£33.57
Total	£105.32	£108.46	£164.92	£206.97	£92.49	£72.51		£942.91

Table 9: Comparison Floorspace

Location	Floorspace sq.m gross	Sales Floorspace sq.m net
Margate comparison shops	13,700	8,220
Westwood Cross Shopping Centre	35,500	26,625
Westwood Cross Retail Parks	38,000	30,400
Tesco Extra, Westwood Cross	n/a	3,857
Sainsbury's, Westwood Cross	n/a	3,427
Broadstairs comparison shops	7,700	4,620
Asda, Broadstairs	n/a	1,323
Ramsgate comparison shops	22,000	13,200
Birchington/Westgate comparison shops	6,910	4,146
TOTAL	n/a	95,818

Table 10: Summary of Comparison Shopping Patterns 2016 to 2031

Town	2016	2021	2026	2031
Available Expenditure in District				
Margate/Cliftonville	£34.56	£40.93	£50.29	£61.61
Westwood Cross	£314.13	£371.95	£457.05	£559.89
Broadstairs	£40.00	£47.37	£58.21	£71.30
Ramsgate	£52.52	£62.19	£76.41	£93.61
Birchington/Westgate	£16.95	£20.07	£24.66	£30.21
Other Thanet	£1.37	£1.63	£2.00	£2.45
Total	£459.55	£544.12	£668.62	£819.06
Benchmark Turnover of Existing Facilities				
Margate/Cliftonville	£34.56	£38.16	£42.13	£46.52
Westwood Cross	£314.13	£346.83	£382.93	£422.78
Broadstairs	£40.00	£44.17	£48.77	£53.84
Ramsgate	£52.52	£57.99	£64.02	£70.68
Birchington/Westgate	£16.95	£18.71	£20.66	£22.81
Other Thanet	£1.37	£1.52	£1.67	£1.85
Total	£459.55	£507.38	£560.18	£618.49
Surplus/Deficit Expenditure				
Margate/Cliftonville	£0.00	£2.76	£8.16	£15.09
Westwood Cross	£0.00	£25.12	£74.12	£137.11
Broadstairs	£0.00	£3.20	£9.44	£17.46
Ramsgate	£0.00	£4.20	£12.39	£22.92
Birchington/Westgate	£0.00	£1.36	£4.00	£7.40
Other Thanet	£0.00	£0.11	£0.32	£0.60
Total	£0.00	£36.75	£108.44	£200.57

Sources: Tables 5 to 9

Table 11: Comparison Floorspace Capacity 2016 to 2031

Town	2016	2021	2026	2031
Turnover Density for New Floorspace (£ per sq.m)	£6,000	£6,624	£7,314	£8,075
Sales Floorspace (sq.m net)				
Margate/Cliftonville	0	417	1,115	1,868
Westwood Cross	0	3,792	10,135	16,979
Broadstairs	0	483	1,291	2,162
Ramsgate	0	634	1,694	2,839
Birchington/Westgate	0	205	547	916
Other Thanet	0	17	44	74
Total	0	5,547	14,826	24,838
Floorspace (sq.m gross)				
Margate/Cliftonville	0	556	1,487	2,491
Westwood Cross	0	5,056	13,513	22,638
Broadstairs	0	644	1,721	2,883
Ramsgate	0	845	2,259	3,785
Birchington/Westgate	0	273	729	1,221
Other Thanet	0	22	59	99
Total	0	7,396	19,768	33,118

Appendix 4 Food and Beverage Capacity

Table 1: Population Projections

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,791	22,818	23,883	24,983	26,022
Zone 2: Margate West	21,519	22,534	23,585	24,671	25,697
Zone 3: Broadstairs/Westwood	24,948	26,124	27,343	28,602	29,792
Zone 4: Ramsgate	40,325	42,226	44,197	46,232	48,155
Zone 5: Westgate/Birchington	14,942	15,647	16,377	17,131	17,843
Zone 6: Thanet Rural	10,664	11,167	11,688	12,226	12,735
Total	134,189	140,516	147,073	153,845	160,245

Sources: ONS and Thanet Strategic Housing Market Assessment (2016)

Table 2: Food and Beverage Expenditure Per Capita

Expenditure Per Capita	2016	2021	2026	2031
Zone 1: Margate East	£889	£951	£1,019	£1,092
Zone 2: Margate West	£947	£1,014	£1,086	£1,164
Zone 3: Broadstairs/Westwood	£1,242	£1,328	£1,423	£1,525
Zone 4: Ramsgate	£944	£1,010	£1,082	£1,160
Zone 5: Westgate/Birchington	£1,140	£1,220	£1,307	£1,401
Zone 6: Thanet Rural	£1,182	£1,265	£1,355	£1,452

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: 2.7% 2014-2015, 1.6% 2015-2017, 1.3% 2017 to 2022 and 1.4% p.a. from 2022

Table 3: Total Available Food and Beverage Expenditure (£m)

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£20.29	£22.72	£25.45	£28.41	12.0%	25.4%	40.1%
Zone 2: Margate West	£21.35	£23.91	£26.78	£29.90	12.0%	25.4%	40.1%
Zone 3: Broadstairs/Westwood	£32.44	£36.32	£40.69	£45.44	12.0%	25.4%	40.1%
Zone 4: Ramsgate	£39.87	£44.65	£50.02	£55.85	12.0%	25.4%	40.1%
Zone 5: Westgate/Birchington	£17.84	£19.98	£22.38	£24.99	12.0%	25.4%	40.1%
Zone 6: Thanet Rural	£13.20	£14.78	£16.56	£18.49	12.0%	25.4%	40.1%
Total	£144.99	£162.36	£181.89	£203.09	12.0%	25.4%	40.1%

Sources: Table 1 and Table 2

Table 4: Base Year Food and Beverage Market Shares (%)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Margate High Street/Old Town	23.4%	27.1%	3.8%	3.2%	9.6%	2.2%	10.0%
Westwood Cross	17.1%	20.5%	8.0%	17.3%	15.6%	9.9%	30.0%
Broadstairs	18.8%	14.6%	62.0%	14.6%	6.1%	11.3%	10.0%
Ramsgate	10.2%	6.6%	7.3%	50.2%	6.5%	5.6%	10.0%
Birchington/Westgate	3.8%	11.5%	1.5%	0.4%	38.6%	15.5%	5.0%
Other Thanet	15.3%	10.8%	5.6%	3.7%	8.7%	32.0%	5.0%
District Total	88.6%	91.1%	88.2%	89.4%	85.2%	76.5%	
Canterbury	2.5%	2.0%	2.6%	2.3%	5.7%	2.6%	n/a
Dover	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Deal	0.3%	0.4%	0.0%	0.8%	0.9%	1.8%	n/a
Herne Bay	1.1%	1.9%	0.0%	0.0%	0.9%	2.2%	n/a
Sandwich	1.8%	0.8%	2.4%	1.0%	0.9%	4.5%	n/a
Other Outside District	5.5%	3.8%	6.8%	6.5%	6.6%	12.3%	n/a
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, July 2012 with NLP adjustments

Table 5: Food and Beverage Expenditure 2016 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	£20.29	£21.35	£32.44	£39.87	£17.84	£13.20		£144.99
Margate High Street/Old Town	£4.74	£5.79	£1.24	£1.28	£1.72	£0.29	£1.67	£16.74
Westwood Cross	£3.48	£4.38	£2.58	£6.91	£2.79	£1.31	£9.19	£30.63
Broadstairs	£3.82	£3.13	£20.13	£5.83	£1.09	£1.49	£3.94	£39.41
Ramsgate	£2.07	£1.41	£2.38	£20.01	£1.17	£0.74	£3.09	£30.87
Birchington/Westgate	£0.76	£2.46	£0.48	£0.17	£6.89	£2.05	£0.67	£13.47
Other Thanet	£3.10	£2.30	£1.82	£1.47	£1.56	£4.22	£0.76	£15.22
District Total	£17.98	£19.45	£28.62	£35.66	£15.20	£10.11	£19.33	£146.34
Canterbury	£0.52	£0.42	£0.86	£0.91	£1.01	£0.35	n/a	£4.06
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.07	£0.09	£0.00	£0.32	£0.15	£0.24	n/a	£0.87
Herne Bay	£0.22	£0.41	£0.00	£0.00	£0.15	£0.29	n/a	£1.08
Sandwich	£0.37	£0.16	£0.76	£0.41	£0.15	£0.59	n/a	£2.45
Other Outside District	£1.12	£0.82	£2.19	£2.58	£1.17	£1.63	n/a	£9.52
Total	£20.29	£21.35	£32.44	£39.87	£17.84	£13.20		£164.32

Table 6: Food and Beverage Expenditure 2021 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2021	£22.72	£23.91	£36.32	£44.65	£19.98	£14.78		£162.36
Margate High Street/Old Town	£5.31	£6.48	£1.39	£1.44	£1.92	£0.33	£1.87	£18.74
Westwood Cross	£3.89	£4.90	£2.89	£7.73	£3.12	£1.47	£10.29	£34.30
Broadstairs	£4.27	£3.50	£22.54	£6.53	£1.22	£1.66	£4.41	£44.13
Ramsgate	£2.32	£1.58	£2.67	£22.40	£1.31	£0.83	£3.46	£34.57
Birchington/Westgate	£0.85	£2.75	£0.53	£0.19	£7.71	£2.29	£0.75	£15.08
Other Thanet	£3.48	£2.57	£2.03	£1.64	£1.74	£4.73	£0.85	£17.05
District Total	£20.13	£21.78	£32.05	£39.93	£17.02	£11.32	£21.64	£163.87
Canterbury	£0.58	£0.47	£0.96	£1.02	£1.13	£0.39	n/a	£4.55
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.08	£0.10	£0.00	£0.35	£0.17	£0.27	n/a	£0.97
Herne Bay	£0.25	£0.46	£0.00	£0.00	£0.17	£0.33	n/a	£1.21
Sandwich	£0.42	£0.18	£0.85	£0.46	£0.17	£0.66	n/a	£2.74
Other Outside District	£1.26	£0.92	£2.46	£2.89	£1.32	£1.82	n/a	£10.66
Total	£22.72	£23.91	£36.32	£44.65	£19.98	£14.78		£184.00

Table 7: Food and Beverage Expenditure 2026 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2026	£25.45	£26.78	£40.69	£50.02	£22.38	£16.56		£181.89
Margate High Street/Old Town	£5.95	£7.26	£1.56	£1.61	£2.15	£0.37	£2.10	£21.00
Westwood Cross	£4.36	£5.49	£3.24	£8.66	£3.49	£1.65	£11.53	£38.43
Broadstairs	£4.79	£3.92	£25.25	£7.31	£1.36	£1.86	£4.94	£49.44
Ramsgate	£2.60	£1.77	£2.99	£25.10	£1.46	£0.93	£3.87	£38.73
Birchington/Westgate	£0.95	£3.08	£0.60	£0.21	£8.64	£2.57	£0.84	£16.89
Other Thanet	£3.89	£2.88	£2.28	£1.84	£1.95	£5.30	£0.95	£19.10
District Total	£22.55	£24.40	£35.91	£44.73	£19.06	£12.68	£24.24	£183.58
Canterbury	£0.65	£0.53	£1.08	£1.14	£1.27	£0.43	n/a	£5.10
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.09	£0.11	£0.00	£0.40	£0.19	£0.30	n/a	£1.09
Herne Bay	£0.28	£0.51	£0.00	£0.00	£0.19	£0.37	n/a	£1.35
Sandwich	£0.47	£0.20	£0.96	£0.51	£0.19	£0.74	n/a	£3.07
Other Outside District	£1.41	£1.03	£2.75	£3.24	£1.47	£2.04	n/a	£11.94
Total	£25.45	£26.78	£40.69	£50.02	£22.38	£16.56		£206.13

Table 8: Food and Beverage Expenditure 2031 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2031	£28.41	£29.90	£45.44	£55.85	£24.99	£18.49		£203.09
Margate High Street/Old Town	£6.65	£8.10	£1.74	£1.80	£2.41	£0.41	£2.34	£23.44
Westwood Cross	£4.87	£6.13	£3.62	£9.67	£3.90	£1.84	£12.87	£42.91
Broadstairs	£5.35	£4.38	£28.19	£8.17	£1.52	£2.08	£5.52	£55.20
Ramsgate	£2.90	£1.98	£3.34	£28.02	£1.63	£1.04	£4.32	£43.24
Birchington/Westgate	£1.07	£3.44	£0.67	£0.23	£9.65	£2.87	£0.94	£18.86
Other Thanet	£4.35	£3.22	£2.54	£2.05	£2.18	£5.92	£1.07	£21.32
District Total	£25.18	£27.25	£40.09	£49.95	£21.28	£14.15	£27.07	£204.98
Canterbury	£0.72	£0.59	£1.20	£1.27	£1.42	£0.49	n/a	£5.69
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.10	£0.12	£0.00	£0.44	£0.22	£0.34	n/a	£1.22
Herne Bay	£0.31	£0.57	£0.00	£0.00	£0.22	£0.41	n/a	£1.51
Sandwich	£0.52	£0.23	£1.07	£0.57	£0.22	£0.82	n/a	£3.43
Other Outside District	£1.57	£1.15	£3.07	£3.62	£1.65	£2.28	n/a	£13.33
Total	£28.41	£29.90	£45.44	£55.85	£24.99	£18.49		£230.16

Table 9: Food and Beverage Floorspace

Location	Floorspace sq.m gross
Margate	3,670
Westwood Cross Shopping Centre	3,120
Westwood Cross Retail Parks	461
Broadstairs	4,960
Ramsgate	6,440
Birchington/Westgate	2,790
TOTAL	21,441

Table 10: Summary of Food and Beverage Patterns 2016 to 2031

Town	2016	2021	2026	2031
Available Expenditure in District (£m)				
Margate/Cliftonville	£16.74	£18.74	£21.00	£23.44
Westwood Cross	£30.63	£34.30	£38.43	£42.91
Broadstairs	£39.41	£44.13	£49.44	£55.20
Ramsgate	£30.87	£34.57	£38.73	£43.24
Birchington/Westgate	£13.47	£15.08	£16.89	£18.86
Other Thanet	£15.22	£17.05	£19.10	£21.32
Total	£146.34	£163.87	£183.58	£204.98
Benchmark Turnover of Existing Facilities (£m)				
Margate/Cliftonville	£16.74	£17.59	£18.49	£19.43
Westwood Cross	£30.63	£32.19	£33.84	£35.56
Broadstairs	£39.41	£41.42	£43.53	£45.75
Ramsgate	£30.87	£32.45	£34.10	£35.84
Birchington/Westgate	£13.47	£14.15	£14.88	£15.64
Other Thanet	£15.22	£16.00	£16.82	£17.67
Total	£146.34	£153.81	£161.65	£169.90
Surplus/Deficit Expenditure (£m)				
Margate/Cliftonville	£0.00	£1.15	£2.51	£4.01
Westwood Cross	£0.00	£2.11	£4.59	£7.34
Broadstairs	£0.00	£2.71	£5.90	£9.45
Ramsgate	£0.00	£2.12	£4.62	£7.40
Birchington/Westgate	£0.00	£0.93	£2.02	£3.23
Other Thanet	£0.00	£1.05	£2.28	£3.65
Total	£0.00	£10.07	£21.92	£35.08

Sources: Tables 5 to 9















Table 11: Food and Beverage Floorspace Capacity 2016 to 2031

Town	2016	2021	2026	2031
Turnover Density for New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805
Floorspace Requirement (sq.m gross)				
Margate/Cliftonville	0	219	454	691
Westwood Cross	0	401	831	1,265
Broadstairs	0	516	1,069	1,627
Ramsgate	0	404	837	1,275
Birchington/Westgate	0	176	365	556
Other Thanet	0	199	413	629
Total	0	1,915	3,970	6,043



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