Nathaniel Lichfield & Partners
Planning. Design. Economics.

Town Centre Retail, Leisure, Tourism and Culture Assessment

Appendices

Thanet District Council

December 2012

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Appendices

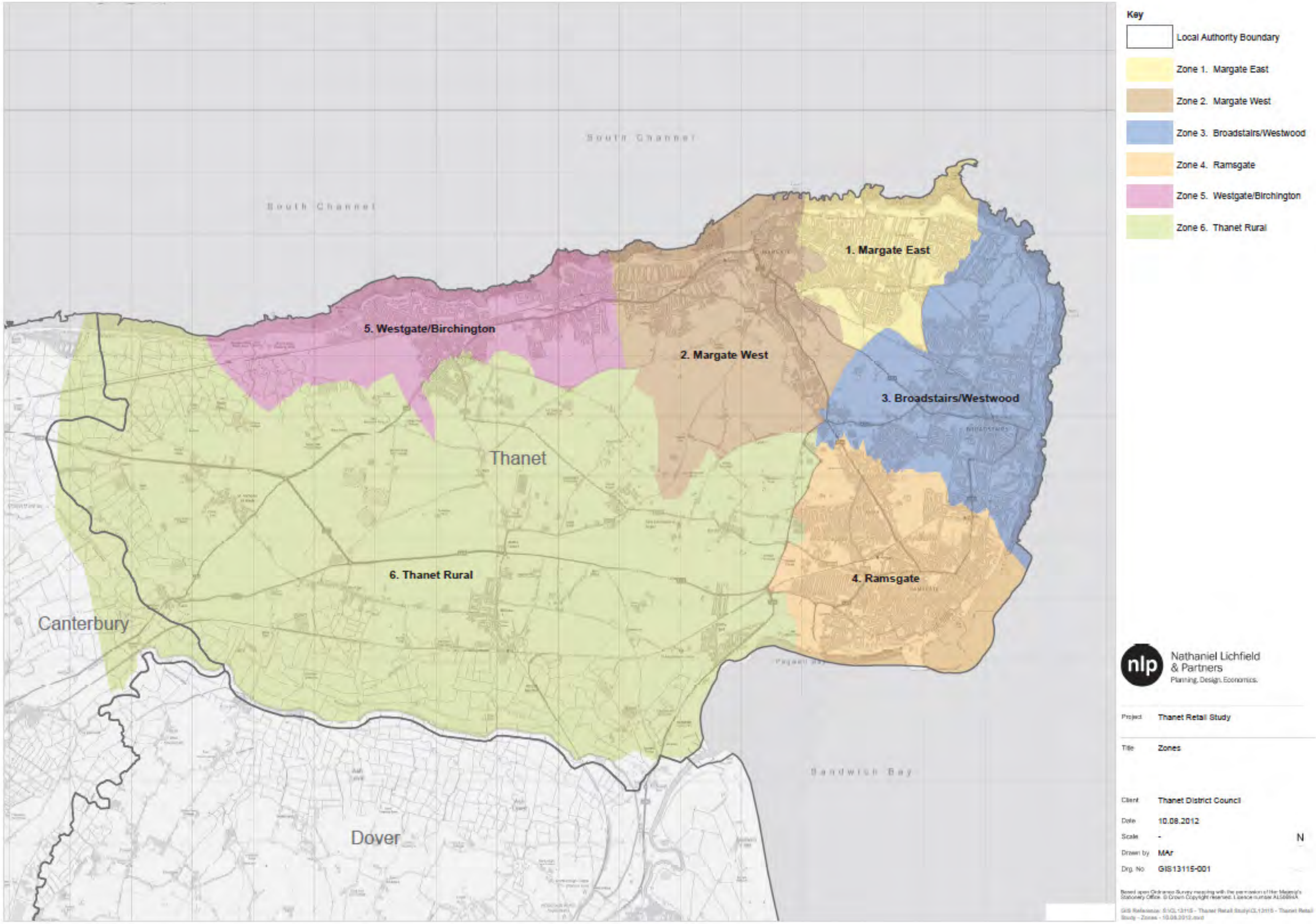
Appendix 1 Study Area and Methodology

Thanet Retail Study Area Zones

Table 1.1 Thanet Retail Study Area Zones and Postcode Sectors

Zone	Area	Postcode Sectors
1	Margate East	CT9 2 CT9 3
2	Margate West	CT9 1 CT9 4 CT9 5
3	Broadstairs/Westwood	CT10 1 CT10 2 CT10 3
4	Ramsgate	CT11 0 CT11 7 CT11 8 CT11 9 CT12 6
5	Westgate/Birchington	CT7 9 CT8 8
6	Thanet Rural	CT7 0 CT12 4 CT12 5

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1.1 All monetary values expressed in this study are at 2010 prices, consistent with Experian's base year expenditure figures for 2010 (Retail Planner Briefing Note 9), which is the most up to date information available.

Study Area

1.2 The study area is based on postcode area boundaries, and covers the district of Thanet. Having reviewed the extent of recent surveys and studies in the neighbouring authorities of Dover and Canterbury, it was not thought necessary to extend the study area beyond the boundary of Thanet. It is considered the survey zones take into consideration the extent of the catchment area of Margate, Westwood Cross, Ramsgate and Broadstairs.

Retail Expenditure

1.3 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 2010 have been obtained.

1.4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 9, September 2011) has been used to forecast expenditure within the study area in the short term (2010 to 2013). 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.

1.5 For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

1.6 We believe the Experian's lower EBS growth forecast rates for 2010 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.3% for 2010-2011, -0.4% for 2011-2012 and 0.5% for 2012 to 2013; for comparison goods: 0.5% for 2010-2011, 1.6% for 2011-2012 and 2.1% for 2012-2013). In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% for convenience goods and 3% for comparison goods) are relatively cautious based on past growth rates and these have been adopted after 2013 in this assessment. These growth figures relate to real growth and exclude inflation.

1.7 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 eg. 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.

1.8 This Experian information suggests that non-store retail sales in 2010 is:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

1.9 Experian predicts that these figures will increase in the future.

1.10 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.

1.11 The adjusted figures suggest that SFT sales in 2010 are:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

1.12 The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016, and estimated at 7.0% and 12.8% by 2028.

1.13 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.

1.14 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17. Experian's September 2011 figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

1.15 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises eg. 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

1.16 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 2012 household survey.

1.17 The total turnover of shops within Thanet district 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 Verdict (UK Food and Grocery retailers 2011) and Mintel (Retail Rankings 2010) 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

1.18 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. 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.

1.19 The estimated convenience goods sales areas have been derived from a combination of the Council's floorspace surveys, Institute of Grocery Distribution (IGD) and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 2, for consistency with the use of goods based expenditure figures.

1.20 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each town in 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 £4,000 per sq.m for small convenience shops in the study area. This is consistent with NLP's experience of retail studies across the country and available turnover information within Mintel's Retailing Rankings 2010. The total benchmark turnover of existing convenience sales floorspace within Thanet is £289.56 million at 2012.

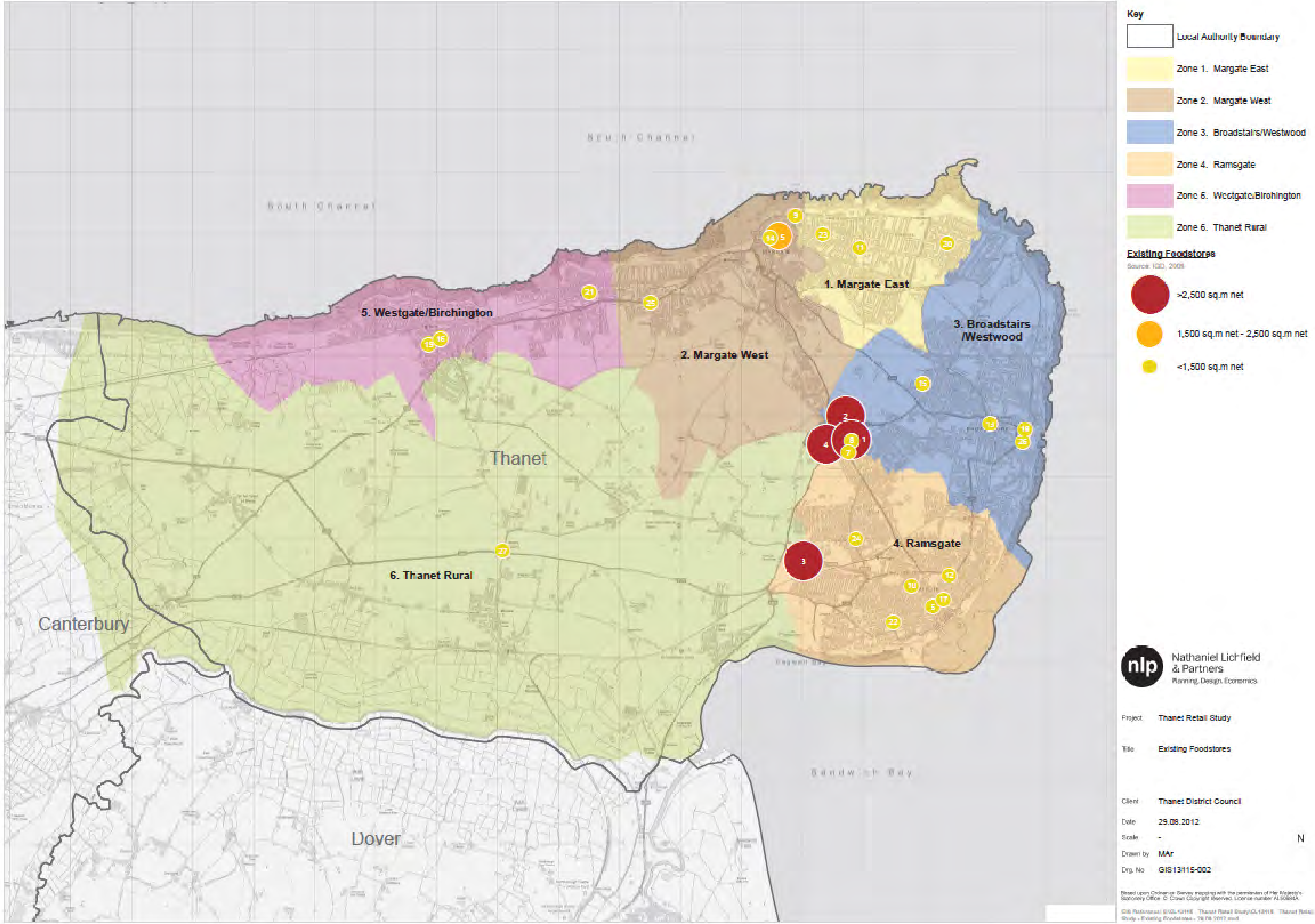
1.21 Mintel's Retail Rankings 2010 provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of £5,500 per sq.m. The average for bulky good retail warehouses is generally lower than this average. Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £8,000 per sq.m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers.

Appendix 2 Existing Retail Facilities

Existing Convenience Goods Floorspace

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience Sales sq.m net
Margate/Cliftonville			
Aldi, Zion Place, Margate	706	80%	565
Iceland, College Walk, Margate	569	95%	541
Marks & Spencer, Canterbury Road	111	95%	106
Morrisons, College Walk, Margate	2,028	85%	1,724
Tesco Express, Canterbury Road, Margate	182	95%	173
Other Town Centre Shops	511	100%	511
Tesco Metro, Northdown Road, Cliftonville	656	90%	590
Co-op, Summerfield Road, Cliftonville	199	95%	189
Total	**4,962**		**4,398**
Westwood Cross			
Marks & Spencer, Westwood Cross	630	100%	630
Sainsbury's, Margate Road	3,351	60%	2,011
Lidl, Margate Road	714	80%	571
Tesco Extra, Margate Road	8,232	60%	4,939
Other Town Centre Shops	420	100%	420
Total	**13,347**		**8,571**
Broadstairs/St Peters			
Asda, Westwood Road, Broadstairs	4,657	70%	3,260
Iceland, High Street, Broadstairs	74	95%	71
Tesco Metro, High Street, Broadstairs	336	90%	302
Other Town Centre Shops	1,113	100%	1,113
Co-op, Hopeville Avenue, St Peters	510	95%	484
Total	**6,690**		**5,230**
Ramsgate			
Aldi, Boundary Road, Ramsgate	650	80%	520
Asda, Chatham Street, Ramsgate	687	70%	481
Co-op, Grange Road, Ramsgate	195	95%	186
Co-op, Newington Road, Ramsgate	119	95%	113
Iceland, King Street, Ramsgate	392	95%	373
Lidl, Margate Road, Ramsgate	1,336	80%	1,069
Tesco, Manston Road, Ramsgate	3,388	85%	2,880
Waitrose, Queen Street, Ramsgate	1,361	95%	1,293
Other Town Centre Shops	1,701	100%	1,701
Total	**9,830**		**8,615**
Birchington/Westgate			
Co-op, Station Road, Birchington	274	95%	260
Co-op, Station Road, Birchington	410	95%	390
Co-op, Station Road, Westgate on Sea	196	95%	187
Other Birchington/Westgate	1,680	100%	1,680
Total	**2,561**		**2,517**
Other Thanet			
Co-op, Tothill Street, Minster	148	95%	140
Other Thanet Local Shops	500	100%	500
Total	**648**		**640**
GRAND TOTAL	**38,038**		**29,971**

Plan 2.1: Existing Foodstore Provision



Existing Comparison Goods 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	3,293
Sainsbury's, Westwood Cross	n/a	1,340
Broadstairs comparison shops	7,700	4,620
Asda, Broadstairs	n/a	1,397
Ramsgate comparison shops	22,000	13,200
Birchington/Westgate comparison shops	6,910	4,146
GRAND TOTAL	n/a	**93,241**

Appendix 3 Audit of Centres

A. Westwood Cross

Westwood Cross is classified as a Town Centre and as such, is one of the main shopping and commercial centres within Thanet. Located in the centre of the District, it draws customers from across the District and beyond. The centre has a variety of retail and service uses. Retail uses (Class A1-A3 and A5) occupy 89,510 sq.m of gross floorspace (source: GOAD).

The key roles of Westwood Cross include:

- **convenience shopping**: The Tesco Extra supermarket is the largest foodstore within Westwood Cross. It is supported by an Sainsbury's, Lidl and a Marks & Spencer Food Hall;
- **comparison shopping**: offers a wide range of national multiple retailers. The main retail provision is located with Westwood Cross centre which accommodates retailers including Marks & Spencer, Debenhams, TK Maxx, Boots and New Look; Westwood Gateway and East Kent Retail Park provide a bulky goods comparison offer including Homebase and Argos;
- **services**: provides a limited range of services including a high street bank, cafés, restaurants, takeaways;
- **entertainment**: including a cinema, casino, bingo hall;
- **community facilities**: provides a health club.

Mix of Uses and Occupier Representation

Westwood Cross has a total of 91 retail/service uses. The diversity of uses present in Westwood Cross in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1: Westwood Cross Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	67	73.6	41.4
Convenience Retail	6	6.6	8.6
A1 Services (2)	1	1.1	10.8
A2 Services	1	1.1	8.5
A3/A5	10	11.0	15.8
Vacant	6	6.6	13.7
Total	**91**	**100.0**	**100.0**

Source: Goad January 2011 and NLP July 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a much higher proportion of comparison retail units than the national average. The centre has a lower proportion of convenience and retail service units when compared with national average. Vacant units are below the national average.

Retailer Representation

Westwood Cross has a good selection of comparison shops (67), reflecting its role in the retail hierarchy in the District. Table A.2 provides a breakdown of comparison shop units by category.

Table A,2: Westwood Cross Breakdown of Comparison Units

Type of Unit	Westwood Cross		% UK* Average
	Units	%	
Clothing and footwear	18	26.9	26.3
Furniture, carpets and textiles	8	11.9	8.4
Booksellers, arts, crafts and stationers	5	7.5	10.7
Electrical, gas, music and photography	9	13.4	9.4
DIY, hardware and homewares	6	9.0	6.1
China, glass, gifts and fancy goods	0	0.0	3.9
Cars, motorcycles and motor access.	1	1.5	2.9
Chemists, drug stores and opticians	4	6.0	9.3
Variety, department and catalogue	6	9.0	1.4
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sport	5	7.5	5.4
Jewellers	3	4.5	4.9
Other comparison retailers	2	3.0	9.1
Total	**76**	**100.0**	**100.0**

Source: Goad January 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

The centre provides all Goad comparison categories excluding china, glass, gifts and fancy goods retail units and florists, nurserymen and seedsmen retail units.

The centre provides a higher proportion of furniture, carpets and textiles than the national average with this trend also apparent for electrical, gas, music and photography and variety, department and catalogue stores. The proportion of booksellers, art, crafts and stationers are below the national average.

Service Uses

Westwood Cross has a poor range of service uses, with only two categories (restaurants/cafes/takeaways and banks/other financial services) represented (see Table A.3). The representation of categories is very different to the national average with a much higher proportion of restaurants/cafes/ takeaways.

Table A.3: Westwood Cross Analysis of Selected Service Uses

Type of Unit	Westwood Cross		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	11	91.7	45.2
Banks/other financial services	1	8.3	13.4
Estate agents/valuers	0	0.0	10.8
Travel agents	0	0.0	3.5
Hairdressers/beauty parlours	0	0.0	24.4
Laundries/dry cleaners	0	0.0	2.7
Total	**12**	**100.0**	**100.0**

Source: Goad January 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Other uses within Westwood Cross include a cinema, a casino and a bingo hall.

Vacant Units

There were six vacant retail units within Westwood Cross at the time of the survey making the vacancy rate (6.6%) less than half the national average of 13.7%. Vacant units are spread throughout the centre and are generally small in size.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Westwood Cross. 55.6% responded “nothing” or “don’t know”. 27.6% of respondents referred to traffic/parking issues, including more traffic-free areas/pedestrianisation (7.6%), better road access (6.5%), more car parking (5.8%), less traffic congestion (3.1%), improved bus services (3.1%), free car parking (1.4%) and more disabled/mother and child parking spaces (0.1%). 18.4% of respondents mentioned issues relating to the range, choice and quality of shops, including better choice of shops in general (6.5%), better choice of clothing shops (2.5%), cheaper stores/lower prices (2.0%), better quality shops (1.8%), more independent/specialist shops (1.4%) and requests for representation from categories of retailers and specific operators not currently present in the centre, including John Lewis, Primark, Ikea and Wilkinsons. 8.3% of responses related to non-shopping improvements to the centre, such as undercover shopping (4.8%), more financial services (1.3%) and general improvements to the layout, shopping environment, toilets, pavements, cleanliness, better disabled facilities and facilities/entertainment for children.

Visitors to Westwood Cross who answered the in-centre survey were asked to rate different aspects of the centre. Westwood Cross scored particularly highly on personal safety, general shopping environment, quality of shops and services available, quality/number of places to eat and drink, car parking charges and bus services. No aspects were rated as poor, with only traffic congestion and the market receiving a “neutral” score, while all other aspects were rated as good to very good.

In terms of improvements that might make the respondents visit Westwood Cross more often, 56.0% stated “nothing in particular” or “don’t know”. 12% identified improvements to car parking availability/reduce parking charges. A further 12% stated increasing the range of local/speciality retailers, and 10% suggested that the shopping should be undercover. 6.0% suggested improvements to the quality of shops and services and 4.0% suggested increasing the range of national multiple/chain stores would make them visit the centre more often.

Summary of Westwood Cross Strengths and Weaknesses

Strengths

- The centre provides a good range of comparison retail services, with a very good range of national multiple retailers.
- The centre has a low vacancy rate of 6.6%.
- Good selection of convenience retail outlets with a – Tesco Extra, Sainsbury, Lidl and Marks & Spencer food hall.
- The centre provides a large amount of car parking.
- The Westwood Cross main shopping centre provides a safe and pleasant shopping environment.
- Good customer satisfaction in rating various aspects of the centre.

Weaknesses

- The centre does not offer the same range of overall retail facilities available as Ramsgate, Margate and Broadstairs.
- The centre has very few independent retailers.
- The centre has a poor range of retail services.
- The various sections of the centre are difficult to navigate and do not encourage pedestrian movement between.
- The centre suffers from heavy traffic.
- No train station.


Margate Road
Hawe Road
Westwood Road
Margate Road
KEY
Comparison
Convenience
A1 Retail Service
A2 Retail Service
A3-A5 Retail Service
Vacant
Misc
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project Thanet Retail Town Centre Study
Title Westwood Cross Goad Extract Showing Use Classes
Client Thanet District Council
Date December 2012
Scale NTS
Drawn by SW
Drg. No IL13115-004
N
CL13115
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B. Ramsgate

Ramsgate is classified as a Town Centre and is one of the four main shopping and commercial centres within Thanet. Located on the south east coast of the District, its primary catchment is residents who reside in Ramsgate and those from the south of the District. The centre has a variety of retail and service uses. Retail uses (Class A1-A3 and A5) occupy 53,270 sq.m of gross floorspace (source: GOAD).

The key roles of Ramsgate include:

- **convenience shopping**: the Asda and Waitrose supermarkets provide the main convenience food store provision within Ramsgate. They are supported by an Iceland, Aldi and a range of smaller units including newsagents, bakers, butchers, greengrocer and a fishmonger;
- **comparison shopping**: offers a small range of national multiple retailers for a town of this size as well as independent retailers. The main retail provision is located along the High Street, which includes retailers such as Peacocks, New Look and Boots;
- **services**: provides a range of services including a post office, high street banks, cafés, restaurants, takeaways, hairdressers, travel agents and health & beauty salons;
- **entertainment**: including an amusement arcade, pubs and bars;
- **community facilities**: provides a range of community services including a dentist, an advice centre and a social club.

Mix of Uses and Occupier Representation

Ramsgate has a total of 320 retail/service uses. The diversity of uses present in Ramsgate in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1: Ramsgate Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	112	35.6	41.4
Convenience Retail	20	6.3	8.6
A1 Services (2)	32	10.0	10.8
A2 Services	25	7.8	8.5
A3/A5	58	18.1	15.8
Vacant	71	22.2	13.7
Total	**320**	**100.0**	**100.0**

Source: Goad March 2012 and NLP July 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a lower proportion of comparison and convenience retail units than the national average. The proportion of A1 and A2 services retail units are similar to the national average, while the proportion of Class A3/A5 services is above the national average. The vacancy rate is considerably higher than the national average.

Retailer Representation

Ramsgate has a good selection of comparison shops (114), reflecting its role in the retail hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category.

Table B.2: Ramsgate Breakdown of Comparison Units

Type of Unit	Ramsgate		% UK*
	Units	%	Average
Clothing and footwear	15	13.2	26.3
Furniture, carpets and textiles	14	12.3	8.4
Booksellers, arts, crafts and stationers	16	14.0	10.7
Electrical, gas, music and photography	7	6.1	9.4
DIY, hardware and homewares	10	8.8	6.1
China, glass, gifts and fancy goods	4	3.5	3.9
Cars, motorcycles and motor access.	2	1.8	2.9
Chemists, drug stores and opticians	8	7.0	9.3
Variety, department and catalogue	1	0.9	1.4
Florists, nurserymen and seedsmen	4	3.5	2.2
Toys, hobby, cycle and sport	11	9.6	5.4
Jewellers	5	4.4	4.9
Other comparison retailers	17	14.9	9.1
Total	**64**	**100.0**	**100.0**

Source: Goad March 2012 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012).*

All Goad categories of comparison retailers are represented in the centre.

The centre provides a higher proportion of furniture, carpets and textiles than the national average with this trend also apparent for the categories of DIY, hardware and homewares; toys, hobby, cycle and sport; and other comparison retailers. The proportion of clothing and footwear units is considerably below the national average. The proportion of electrical, gas, music and photography units are also below the national average.

Service Uses

Ramsgate has a good range of service uses, with all categories represented (see Table B.3). The representation of categories is generally lower than the national average, with the exception of restaurants/cafés/takeaways and estate agents/valuers, of which there is a higher proportion

Table B.3: Ramsgate Analysis of Selected Service Uses

Type of Unit	Ramsgate		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	58	50.4	45.2
Banks/other financial services	13	11.3	13.4
Estate agents/valuers	14	12.2	10.8
Travel agents	2	1.7	3.5
Hairdressers/beauty parlours	25	21.7	24.4
Laundries/dry cleaners	3	2.6	2.7
Total	**115**	**100.0**	**100.0**

Source: Goad March 2012 and NLP July 2012
* UK average for all town centres surveyed by Goad Plans (June 2012).

Other uses within Ramsgate include a post office, a dentist, an advice centre, an amusement arcade and a number of pubs and bars.

Vacant Units

There were 71 vacant retail units within Ramsgate at the time of the survey making the vacancy rate (22.2%) considerably above the national average of 13.7%.

Vacant units are spread throughout the centre and are generally small. There is a concentration of vacant units from where the High Street meets the pedestrian area up to Church Hill (eight in total).

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Ramsgate. 62.5% responded “nothing” or “don’t know”. 35.2% of respondents mentioned issues relating to the range, choice and quality of shops, including better choice of shops in general (19.3%), better quality shops (6.6%), better choice of clothing shops (4.8%), more large shops (1.5%), more independent/specialist shops (0.9%), less empty shops (0.6%) and more supermarkets (0.6%). Other comments related to specific categories of retailers, less charity shops and more/better market stalls. 11.1% of respondents referred to traffic/parking issues, including more free parking (5.9%), more car parking (3.6%), improved bus service (1.0%), better road access (0.3%) and more traffic-free areas/pedestrianisation (0.3%). 6.7% of responses related to non-shopping improvements to the centre, such as better maintenance/cleanliness (4.6%), make the environment more attractive (0.6%), improved safety/more policing (0.6%), more places to eat/drink (0.3%), more entertainment for children/young people (0.3%), renovate/refurbish the centre (0.3%), better toilets (0.3%), undercover shopping, better shopping mall and more events/entertainment.

Visitors to Ramsgate who answered the in-centre survey were asked to rate different aspects of the centre. 11 of the factors were rated as “neutral”, while eight were rated as good, including bus services, bus facilities and quality/number of places to eat/drink. The factor with the lowest score was car parking charges, followed by the market. No aspects were rated as poor.

In terms of improvements that might make the respondents visit Ramsgate more often, 18% stated “nothing in particular” or “don’t know”. 22% stated that improvements to the quality of shops and services would make them visit Ramsgate more often, followed by 18% suggesting improvements to the appearance of the town centre and 16% suggesting making the centre safer (more CCTV, policing, better lighting etc). Making the centre cleaner/less litter/dog fouling and providing better entertainment/leisure were aspects each suggested by 12% of respondents. 10% wanted to see improvements to the market, while other suggestions included opening the empty shops (8%), more toilets (6%), increasing the range of local/speciality retailers (6%) and improving the frequency of public transport (4%).

Summary of Ramsgate Strengths and Weaknesses

Strengths

- The centre has a good range of comparison retailers with all Goad categories represented. There is a relatively good choice of national multiple retailers complemented by a number of independent retailers.
- The centre provides a good range of service facilities and uses complementary to its main shopping role.
- There are a number of premises available to accommodate new operators looking to trade in Ramsgate.
- The central part of Ramsgate is pedestrianised creating a safe and accessible environment for shopping.
- The centre has a good provision of car parking for shoppers.
- There is a good supply of food and grocery provision in the centre which is suitable for both main and top up food shopping.
- The Marina creates an attractive focal point for the centre.

Weaknesses

- The vacancy rate is nearly double the national average at 22.2%.
- The proportion of clothing and footwear units is considerably lower than the national average.
- The train station is around 1km from the primary shopping area which may discourage visitors to arrive by train.
- There are few entertainment and leisure facilities within the centre.
- The customer survey results suggest concerns regarding the appearance of the town centre and perception of safety.


KEY
Comparison
Convenience
A1 Retail Service
A2 Retail Service
A3-A5 Retail Service
Vacant
Misc
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project
Thanet Retail Town Centre Study
Title
Ramsgate Goad Extract Showing Use Classes
Client
Thanet District Council
Date
December 2012
Scale
NTS
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Drg. No
IL13115-001
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C. Margate

Margate is classified as a Town Centre and, is one of the main shopping and commercial centres within Thanet. Located on the Northern coast of the District, its primary catchment is residents who reside in Margate and those from the north of the District. The centre has a variety of retail and service uses. Retail uses (Class A1-A3 and A5) occupy 35,300 sq.m of gross floorspace (source: GOAD). The key roles of Margate include:

- **convenience shopping**: the Morrisons supermarket is the largest foodstore within Margate. It is supported by an Iceland and a range of smaller units including newsagents, bakers and butchers;
- **comparison shopping**: offers a reasonable range of national multiple retailers for a town of this size as well as independent retailers. The main retail provision is located along the High Street which includes Primark, Peacocks, Burton, New Look, Boots and Superdrug. A number of small independent comparison units are located in the "old town" part of Margate.
- **services**: provides a range of services including a post office, high street banks, cafés, restaurants, takeaways, hairdressers, travel agents and health & beauty salons;
- **entertainment**: including amusement arcades, nightclubs, a bowling alley, pubs, bars and the Turner Contemporary Gallery;
- **community facilities**: provides a range of community services including a doctors surgery, a community centre, council offices, a library, a dentist and an advice centre.

Mix of Uses and Occupier Representation

Margate has a total of 235 retail/service uses. The diversity of uses present in Margate in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1: Margate Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	87	37.0	41.4
Convenience Retail	10	4.3	8.6
A1 Services (2)	20	8.5	10.8
A2 Services	13	5.5	8.5
A3/A5	30	12.8	15.8
Vacant	75	31.9	13.7
Total	**235**	**100.0**	**100.0**

Source: Goad May 2011 and NLP July 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a lower proportion of all categories of retail and service units than the national average. The proportion of vacant units is considerably higher than the national average – at 31.9% this is more than double the national average.

Retailer Representation

Margate has a reasonable selection of comparison shops (87), reflecting its role in the retail hierarchy in the District. Table C.2 provides a breakdown of comparison shop units by category.

Table C.2: Margate Breakdown of Comparison Units

Type of Unit	Margate		% UK* Average
	Units	%	
Clothing and footwear	15	17.2	26.3
Furniture, carpets and textiles	7	8.0	8.4
Booksellers, arts, crafts and stationers	15	17.2	10.7
Electrical, gas, music and photography	6	6.9	9.4
DIY, hardware and homewares	5	5.7	6.1
China, glass, gifts and fancy goods	9	10.3	3.9
Cars, motorcycles and motor access.	0	0.0	2.9
Chemists, drug stores and opticians	8	9.2	9.3
Variety, department and catalogue	2	2.3	1.4
Florists, nurserymen and seedsmen	2	2.3	2.2
Toys, hobby, cycle and sport	2	2.3	5.4
Jewellers	4	4.6	4.9
Other comparison retailers	12	13.8	9.1
Total	**87**	**100.0**	**100.0**

Source: Goad May 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Most Goad comparison retailers are present excluding car, motorcycle and motor access retail units.

The centre provides a higher proportion of booksellers, arts, crafts and stationers than the national average with this trend also apparent for china, glass, gifts and fancy goods and "other" comparison retailers (which includes charity shops). The proportion of clothing and footwear units is noticeably lower than the national average. The proportion of toys, hobby, cycle and sport units are also below the national average

Service Uses

Margate has a good range of service uses, with all categories represented (see Table C.3). There is a slightly higher proportion of restaurants/cafes/takeaways and estate agents/valuers in the centre compared to the national average and a lower proportion of banks/other financial services and travel agents.

Table C.3: Margate Analysis of Selected Service Uses

Type of Unit	Margate		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	33	52.4	45.2
Banks/other financial services	6	9.5	13.4
Estate agents/valuers	8	12.7	10.8
Travel agents	1	1.6	3.5
Hairdressers/beauty parlours	14	22.2	24.4
Laundries/dry cleaners	1	1.6	2.7
Total	**63**	**100.0**	**100.0**

Source: Goad May 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Other uses within Margate includes a number of amusement arcades, nightclubs, a bowling alley, pubs and bars, a post office, a dentist, doctors surgery, a community centre, council offices, a library, an advice centre and the Turner Contemporary Gallery.

Vacant Units

There were 75 vacant retail units within Margate at the time of the survey making the vacancy rate (31.9%) considerably higher than the national average of 13.7%.

Vacant units are spread throughout the centre and are generally small, with some larger units such as the former Woolworths unit on the High Street. There is a concentration of vacant units in The Centre (12 in total).

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Margate Old Town and Margate High Street.

In respect of Margate Old Town, 53.2% responded "nothing" or "don't know". 52.2% of respondents mentioned issues relating to the range, choice and quality of shops, including better choice of shops in general (30.5%), better quality shops (8.0%), better choice of clothing shops (6.6%), more large shops (2.1%), more supermarkets (1.9%), more independent/specialist shops (0.8%), less empty shops (0.8%) and cheaper stores/lower prices (0.5%). Other comments related to specific categories of retailers. 11.3% of respondents referred to traffic/parking issues, including more free parking (6.0%), more car parking (3.9%), improved bus service (0.5%), more traffic-free areas/ pedestrianisation (0.4%) and less traffic congestion (0.3%). 7.8% of responses related to non-shopping improvements to the centre, including better maintenance/cleanliness (3.9%), renovate/refurbish the centre (0.9%), more places to eat/drink (0.9%), improved safety/more policing (0.6%), make it a more attractive environment (0.4%) and more publicity of what it has to offer (0.4%). Lower shop rents was also suggested.

For Margate High Street, 40.6% responded “nothing” or “don’t know” when asked what would make them shop more often in Margate High Street. 70.4% of respondents raised issues relating to the range, choice and quality of shops, including better choice of shops in general (43.8%), better quality shops (9.5%), better choice of clothing shops (8.4%), more large shops (2.4%), more supermarkets (2.3%), more independent/specialist shops (1.3%), less empty shops (1.3%), together with comments related to specific categories of retailers and retail operators. 13.4% raised non-retail improvements to the centre, including better maintenance/cleanliness (7.1%), improved safety/more policing (1.8%) and renovate/refurbish the centre (1.1%).

Visitors to Margate who answered the in-centre survey were asked to rate different aspects of the centre. Five elements were rated as “poor” – the range of shops and services, the quality of shops and services available, daytime entertainment/leisure facilities, liveliness/street life/ character and the market. Four aspects were rated as “good” – bus services, bus facilities, car parking charges and personal safety, with all other factors rated as “neutral”. Overall, Margate scored the worst average score out of the main centres in Thanet.

In terms of improvements that might make the respondents visit Margate more often, only 6% stated “nothing in particular” or “don’t know”. 40% stated that improvements to the quality of shops and services would make them visit Margate more often, followed by 38% suggesting improvements to the appearance of the town centre, 30% suggested increasing the range of local/ speciality retailers and 20% suggesting making the centre cleaner/less litter/ dog fouling. Providing better entertainment/leisure and increasing the range of national/multiple chain stores were aspects each suggested by 16% of respondents. 8% wanted to see the empty shops opened.

Margate and The Portas Review

The Portas Review (December 2011) made a number of key recommendations aimed at identifying what government, local authorities, businesses and communities could do together to promote the development of new models of prosperous and diverse high streets. Its starting point was that Britain’s high streets have reached crisis point and urgent action is required. The Review recognises that the changes in the retail environment which have caused the decline of high street retailing are broader than out-of-town retailing, and that these changes are permanent. The Review is presented against a background of town centre vacancy rates doubling in the past two years and over half of consumer spending now taking place away from traditional high street shops. The key themes of the review are regeneration and modernisation, with a strong social and community emphasis and new benchmarks for judging high streets. Portas suggests that high streets “should become places where we go to engage with other people in our communities, where shopping is just one small part of a rich mix of activities”.

Portas makes 28 wide-ranging recommendations; many of which are planning-related. First, it is recommended that the Secretary of State has “exceptional sign-off ” for all new out-of-town developments - she says that, "...Where the case for an out-of-town development has been proved, the Secretary of State should more frequently use his existing powers to decide whether there has been enough consideration of the impact of out-of-town development on the town centre. This could be restricted to extensions over a defined size or scope, in order to not overly slow the planning system". So-called big new developments should also then only be signed off where they include some designated (affordable) space quota for smaller retail units for local entrepreneurs; s106 obligations could be used to secure this. As a consequence too of finding out that there has been no recent research "undertaken to understand the impact of out-of-town developments on town centres", Portas recommends that new research is undertaken, "with a clearly defined purpose to ensure the outcome provides information that is useful in making planning decisions".

Secondly, and key to policy and decision-making, is the recommendation that the National Planning Policy Framework makes explicit in its wording a presumption in favour of sustainable town centre development (including offices as well as shops and businesses).

Portas’ other recommendations present opportunities for existing and future town centre developments to have a stronger role within the wider management objectives of ‘Town Teams’ and business improvement districts (BIDs), and developers, landowners and operators will need to take greater responsibility in this area. Building flexible spaces and a mix of uses which provide for a range of community activities will continue to be key to the long term regeneration, vitality and viability of centres. Portas recognises a need for bespoke solutions which meet the needs and aspirations of local communities. In responding to calls for affordable shops within new big developments, it may be appropriate in some locations to explore more effective alternatives to low-rent permanent floorspace which will better meet social and community objectives, such as public space which can accommodate markets and temporary low-cost space.

In some areas it may be appropriate to manage the decline of the traditional high street retail offer and introduce other more sustainable uses which will generate activity and create attractive environments.

Portas’ observations also lend support to more flexible approaches to parking provision and pricing in town centre schemes, regardless of existing Local Authority pricing structures which have sometimes influenced the basis for provision against developer wishes in the past.

Landowners and developers will come under pressure to secure the active use of vacant units and sites, but this objective could also provide an opportunity to seek more effective temporary use rights to encourage meanwhile uses in vacant units or on sites awaiting redevelopment. Increased flexibility of changes of use may assist property owners. The Review could also encourage LPAs being more willing to exercise CPO powers to enable town centre development.

Following the recommendations contained within the Review the Government established a number of “High Street Pilots” to test proof the ideas in the Portas Review.

Margate was named one of the first 12 towns to be Portas Pilots in May 2012, and its bid worth £100,000 will help rejuvenate the town centre, as well as test out the measures in Mary Portas’ High Street Review. An area of high deprivation and low income, Margate has been labelled as ‘Britain’s second worst ghost town’ with its high vacancy rate. For Margate, the bid looked to put education and enjoyment at the heart of the town centre’s transformation, with courses, “job club” services and pop up shops setting up in vacant retail premises. A new quality market will be opened with stalls offered to entrepreneurs, a website produced, free public WIFI, high street co-ordinator, marketing material and work to improve the look of the local area also help revitalise Margate.

Summary of Margate Strengths and Weaknesses

Strengths

- The centre has a reasonable range and choice of national multiple and independent retailers.
- The centre provides a good range of service facilities and uses complementary to its main shopping role.
- Within the centre, all but one of the comparison retail categories are represented.
- There are premises available to accommodate new operators looking to trade in Margate with units of various sizes to accommodate new retailers.
- Parts of the town centre are pedestrianised which creates a pleasant shopping environment
- The centre has a good provision of car parking for shoppers.
- The centre has a high proportion of gift and craft shops which caters for the tourist market.
- The centre has tourist attractions, in particular the Turner Contemporary Gallery.
- The beach creates a pleasant focal pint for the centre.
- The centre is well serviced by public transport.

Weaknesses

- The vacancy rate is more than double the national average at 31.9%.
- The proportion of clothing and footwear units is noticeably lower than the national average.

- The proportion of all categories of retail and service units is lower than the national average.
- Poor perception of the town centre from the household and in-centre survey results.


Marine Drive
High Street
High Street
Hawley Street
Queen Street
Cecil Street
KEY
Comparison
Convenience
A1 Retail Service
A2 Retail Service
A3-A5 Retail Service
Vacant
Misc
nlp
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project Thanet Retail Town Centre Study
Title Margate Goad Extract Showing Use Classes
Client Thanet District Council
Date December 2012
Scale NTS
Drawn by SW
Drg. No IL13115-002
N
CL13115

D. Broadstairs

Broadstairs is classified as a Town Centre and as such, is one of the main shopping and commercial centres within Thanet. Located on the eastern coast of the District, its primary catchment is residents who reside in and around the Broadstairs area although it also attracts customers from across the District and Kent as an attractive coastal town. The centre has a variety of retail and service uses. Retail uses (Class A1-A3 and A5) occupy 22,700 sq.m of gross floorspace (source: GOAD).

The key roles of Broadstairs include:

- **convenience shopping**: the Tesco Metro supermarket is the largest foodstore within Broadstairs. It is supported by an Iceland and a range of smaller units including newsagents, bakers, butchers, delicatessen and a fishmonger;
- **comparison shopping**: offers a large number of independent retailers with a small number of national multiple retailers. The main national multiple retailers are the Superdrug and Boots stores located on the High Street.
- **services**: provides a range of services including a post office, high street banks, cafés, restaurants, takeaways, hairdressers, travel agents and beauty parlours;
- **entertainment**: including a amusement arcade, an independent cinema, a museum, art galleries, pubs and bars;
- **community facilities**: provides a range of community services including a doctors surgery, a town hall, council offices, a library, dentists and an advice centre.

Mix of Uses and Occupier Representation

Broadstairs has a total of 213 retail/service units. The diversity of uses present in Broadstairs in terms of the number of units is set out in Table D.1, compared against the national average.

Table D.1: Broadstairs Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	76	35.7	41.4
Convenience Retail	18	8.5	8.6
A1 Services (2)	32	15.0	10.8
A2 Services	22	10.3	8.5
A3/A5	47	22.0	15.8
Vacant	18	8.5	13.7
Total	**213**	**100.0**	**100.0**

Source: Goad January 2012 and NLP July 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre has a lower proportion of comparison retail units than the national average. The centre has a higher proportion of convenience and retail service units than the national average. Vacant units are below the national average.

Retailer Representation

Broadstairs has a reasonable selection of comparison shops (76), reflecting its role in the retail hierarchy in the District. Table D.2 provides a breakdown of comparison shop units by category.

Table D.2: Broadstairs Breakdown of Comparison Units

Type of Unit	Broadstairs		% UK* Average
	Units	%	
Clothing and footwear	12	15.8	26.3
Furniture, carpets and textiles	12	15.8	8.4
Booksellers, arts, crafts and stationers	12	15.8	10.7
Electrical, gas, music and photography	4	5.3	9.4
DIY, hardware and homewares	5	6.6	6.1
China, glass, gifts and fancy goods	4	5.3	3.9
Cars, motorcycles and motor access.	4	5.3	2.9
Chemists, drug stores and opticians	6	7.9	9.3
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	2	2.6	2.2
Toys, hobby, cycle and sport	5	6.6	5.4
Jewellers	4	5.3	4.9
Other comparison retailers	6	7.9	9.1
Total	**76**	**100.0**	**100.0**

Source: Goad January 2012 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012).*

The centre has no variety, department and catalogue retail units. All other Goad categories are represented.

The centre provides a higher proportion of furniture, carpets and textiles than the national average with this trend also apparent for booksellers, arts, crafts and stationers. The proportion of clothing and footwear units is significantly lower than the national average and the proportion of electrical, gas, music and photography units are below the national average.

Service Uses

Broadstairs has a good range of service uses, with all categories represented (see Table D.3). The provision of restaurants/cafes/takeaways is in line with the national average, as is the provision of hairdressers/beauty parlours and laundries/dry cleaners is lower than the national average, whilst the provision of estate agents is higher.

Table D.3: Broadstairs Analysis of Selected Service Uses

Type of Unit	Broadstairs		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	48	47.5	45.2
Banks/other financial services	8	7.9	13.4
Estate agents/valuers	14	13.9	10.8
Travel agents	2	2.0	3.5
Hairdressers/beauty parlours	26	25.7	24.4
Laundries/dry cleaners	3	3.0	2.7
Total	**101**	**100.0**	**100.0**

Source: Goad May 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Other uses within Broadstairs includes an amusement arcade, cinema, museum, art galleries, pubs, bars, a doctors surgery, a town hall, council offices, a library, dentists and an advice centre.

Vacant Units

There were 18 vacant retail units within Broadstairs at the time of the survey making the vacancy rate (8.5%) below the national average of 13.7%.

Vacant units are spread throughout the centre and are small in size.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Broadstairs. 75.9% responded “nothing” or “don’t know”. 17.0% of respondents referred to traffic/parking issues, including more car parking (7.0%), more free parking (6.9%), more traffic-free areas/pedestrianisation (1.4%), better road access (0.8%) and improved bus services (0.6%). 13.7% of respondents mentioned issues relating to the range, choice and quality of shops, including better choice of shops in general (7.6%), better choice of clothing shops (2.0%), better quality shops (1.5%), more large shops (0.6%), more independent/specialist shops (0.6%) and more supermarkets (0.6%). Other comments related to specific categories of retailers and operators. Just 1.8% of responses related to non-shopping improvements to the centre, the highest scoring answer being more places to eat/drink (0.5%).

Visitors to Broadstairs who answered the in-centre survey were asked to rate different aspects of the centre. Three factors rated poorly – car parking availability, car parking charges and traffic congestion. All other aspects were rated as “good”, with personal safety, bus services, public toilets and quality/ number of places to eat/drink scoring particularly highly.

In terms of improvements that might make the respondents visit Broadstairs more often, 48% stated “nothing in particular” or “don’t know”. 28% stated that improving car parking availability/reducing car parking charges would make them visit Broadstairs more often, followed by 16% suggesting increasing the range of local/speciality retailers and 8% suggested improvements to the appearance of the town centre.

Summary of Broadstairs Strengths and Weaknesses

Strengths

- The centre has a good range and choice of independent retailers which provides Broadstairs with a unique character.
- The centre provides a good range of service facilities and uses complementary to its main shopping role.
- Within the centre, all but one of the of comparison retail categories are represented.
- The centre has a low vacancy rate of 8.5%.
- The centre is well served by public transport.
- Attractive coast line, with a number of restaurant and cafes fronting the sea which provides a pleasant amenity.
- Shopper satisfaction with the centre is generally high.

Weaknesses

- The number of comparison retailers is limited.
- Food and grocery provision in the centre is only suitable for top up food shopping as the centre only contains a Tesco Metro and Iceland with a range of smaller convenience goods.
- There is a limited supply of premises available to accommodate new operators looking to trade in Broadstairs. Further more, all vacant units are small, which may limit their attractiveness to new occupiers.
- High Street is linear and a main traffic route to the coast which can cause a barrier to pedestrian movement.
- Shoppers view car parking availability, car parking charges and traffic congestion as negative factors.

KEY

- Comparison
- Convenience
- A1 Retail Service
- A2 Retail Service
- A3-A5 Retail Service
- Vacant
- Misc

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	Thanet Retail Town Centre Study
Title	**Broadstairs Goad Extract Showing Use Classes**
Client	Thanet District Council
Date	December 2012
Scale	NTS
Drawn by	SW
Drg. No	IL13115-003

N

CL13115

Appendix 4 Convenience Assessment

Table 1A: Population Projections

Zone Area	2010	2012	2016	2021	2026	2031
Zone 1: Margate East	20,922	21,020	21,415	21,920	22,437	22,965
Zone 2: Margate West	21,914	22,017	22,431	22,959	23,500	24,054
Zone 3: Broadstairs/Westwood	24,647	24,762	25,228	25,823	26,431	27,054
Zone 4: Ramsgate	39,264	39,448	40,190	41,137	42,106	43,099
Zone 5: Westgate/Birchington	15,629	15,702	15,997	16,374	16,760	17,155
Zone 6: Thanet Rural	9,723	9,768	9,952	10,187	10,427	10,672
Total	**132,100**	**132,717**	**135,213**	**138,400**	**141,661**	**145,000**

Sources: Experian MMG3 and Thanet District Council

Table 2A: Convenience Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2016	2021	2026	2031
Zone 1: Margate East	£1,692	£1,703	£1,743	£1,787	£1,837
Zone 2: Margate West	£1,681	£1,691	£1,732	£1,775	£1,825
Zone 3: Broadstairs/Westwood	£1,958	£1,970	£2,018	£2,068	£2,126
Zone 4: Ramsgate	£1,731	£1,742	£1,783	£1,828	£1,879
Zone 5: Westgate/Birchington	£1,834	£1,845	£1,890	£1,937	£1,991
Zone 6: Thanet Rural	£2,048	£2,061	£2,110	£2,163	£2,224

Sources:
Experian local estimates for 2010 convenience goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates
(-0.3% 2010-2011, -0.4% 2011-2012, 0.5% 2012-2018 and 0.6% per annum onwards)

Table 3A: Total Available Convenience Goods Expenditure (£M - 2010 Prices)

Zone	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Margate East	£35.57	£36.47	£38.21	£40.09	£42.19	2.5%	7.4%	12.7%	18.6%
Zone 2: Margate West	£37.01	£37.93	£39.77	£41.71	£43.90	2.5%	7.4%	12.7%	18.6%
Zone 3: Broadstairs/Westwood	£48.48	£49.70	£52.11	£54.66	£57.52	2.5%	7.5%	12.7%	18.6%
Zone 4: Ramsgate	£68.28	£70.01	£73.35	£76.97	£80.98	2.5%	7.4%	12.7%	18.6%
Zone 5: Westgate/Birchington	£28.80	£29.52	£30.95	£32.46	£34.16	2.5%	7.5%	12.7%	18.6%
Zone 6: Thanet Rural	£20.01	£20.51	£21.49	£22.55	£23.74	2.5%	7.4%	12.7%	18.6%
Total	**£238.15**	**£244.14**	**£255.87**	**£268.46**	**£282.48**	**2.5%**	**7.4%**	**12.7%**	**18.6%**

Sources: Table 1A and Table 2A

Table 4A: Convenience Shopping Penetration Rates 2012

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%
Braodstairs 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

Table 5A: Convenience Expenditure 2012 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2012	**£35.57**	**£37.01**	**£48.48**	**£68.28**	**£28.80**	**£20.01**		**£238.15**
Morrisons, College Walk, Margate	£4.34	£7.77	£0.29	£0.00	£1.32	£0.38	£1.57	£15.67
Aldi, Zion Place, Margate	£2.77	£1.37	£0.19	£0.00	£1.50	£0.10	£0.31	£6.25
Other Margate	£1.17	£4.33	£0.24	£0.00	£0.92	£0.14	£0.36	£7.17
Tesco Metro, Northdown Road, Cliftonville	£8.04	£0.70	£0.68	£0.14	£0.23	£0.00	£0.52	£10.30
Cliftonville	£1.21	£0.11	£0.19	£0.00	£0.00	£0.14	£0.09	£1.74
Other Zones 1/2	£0.11	£0.96	£0.00	£0.07	£0.00	£0.14	£0.07	£1.34
Margate/Cliftonville Sub-Total	**£17.64**	**£15.25**	**£1.60**	**£0.20**	**£3.97**	**£0.90**	**£2.91**	**£42.48**
Tesco Extra, Margate Road	£7.93	£7.18	£10.47	£9.35	£4.81	£2.12	£10.47	£52.34
Sainsbury's, Margate Road	£2.70	£4.18	£8.05	£4.92	£4.18	£1.54	£6.39	£31.96
Marks & Spencer, Westwood Cross	£0.28	£0.56	£0.34	£1.09	£0.46	£0.40	£0.78	£3.92
Other Westwood Cross	£0.11	£0.00	£0.00	£0.34	£0.12	£0.00	£0.14	£0.70
Westwood Cross Sub-Total	**£11.03**	**£11.92**	**£18.86**	**£15.71**	**£9.56**	**£4.06**	**£17.78**	**£88.91**
Asda, Westwood Road, Broadstairs	£5.33	£6.59	£12.12	£5.87	£2.28	£1.36	£3.73	£37.28
Other Broadstairs	£0.39	£0.59	£10.18	£0.41	£0.49	£1.00	£0.69	£13.75
Other Zone 3	£0.11	£0.11	£2.28	£0.00	£0.00	£0.28	£0.15	£2.92
Broadstairs Sub-Total	**£5.83**	**£7.29**	**£24.58**	**£6.28**	**£2.76**	**£2.64**	**£4.56**	**£53.95**
Tesco, Manston Road, Ramsgate	£0.32	£0.81	£0.19	£15.57	£1.93	£2.96	£3.84	£25.63
Waitrose, Queen Street, Ramsgate	£0.11	£0.07	£0.63	£6.49	£0.37	£0.54	£1.45	£9.66
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.58	£5.94	£0.00	£0.38	£0.77	£7.67
Asda, Chatham Street, Ramsgate	£0.11	£0.00	£0.39	£5.19	£0.00	£0.00	£0.63	£6.32
Other Ramsgate	£0.53	£0.07	£1.41	£12.70	£0.55	£0.40	£0.82	£16.49
Ramsgate Sub-Total	**£1.07**	**£0.96**	**£3.20**	**£45.89**	**£2.85**	**£4.28**	**£7.52**	**£65.76**
Birchington	£0.00	£0.19	£0.00	£0.00	£5.82	£2.70	£0.46	£9.16
Westgate	£0.00	£1.11	£0.15	£0.00	£3.08	£0.08	£0.23	£4.65
Birchington/Westgate Sub-Total	**£0.00**	**£1.30**	**£0.15**	**£0.00**	**£8.90**	**£2.78**	**£0.69**	**£13.81**
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.09	£2.30	£0.13	£2.51
District Total	**£35.57**	**£36.71**	**£48.39**	**£68.08**	**£28.14**	**£16.96**	**£33.58**	**£267.43**
Canterbury	£0.00	£0.19	£0.10	£0.14	£0.46	£2.40	n/a	£3.28
Dover	£0.00	£0.11	£0.00	£0.00	£0.00	£0.36	n/a	£0.47
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.20	£0.08	n/a	£0.28
Sandwich	£0.00	£0.00	£0.00	£0.07	£0.00	£0.20	n/a	£0.27
Total	**£35.57**	**£37.01**	**£48.48**	**£68.28**	**£28.80**	**£20.01**		**£271.73**

Table 6A: Convenience Expenditure 2016 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	**£36.47**	**£37.93**	**£49.70**	**£70.01**	**£29.52**	**£20.51**		**£244.14**
Morrisons, College Walk, Margate	£4.45	£7.97	£0.30	£0.00	£1.36	£0.39	£1.61	£16.07
Aldi, Zion Place, Margate	£2.84	£1.40	£0.20	£0.00	£1.53	£0.10	£0.32	£6.40
Other Margate	£1.20	£4.44	£0.25	£0.00	£0.94	£0.14	£0.37	£7.35
Tesco Metro, Northdown Road, Cliftonville	£8.24	£0.72	£0.70	£0.14	£0.24	£0.00	£0.53	£10.56
Cliftonville	£1.24	£0.11	£0.20	£0.00	£0.00	£0.14	£0.09	£1.79
Other Zones 1/2	£0.11	£0.99	£0.00	£0.07	£0.00	£0.14	£0.07	£1.38
Margate/Cliftonville Sub-Total	**£18.09**	**£15.63**	**£1.64**	**£0.21**	**£4.07**	**£0.92**	**£2.98**	**£43.54**
Tesco Extra, Margate Road	£8.13	£7.36	£10.74	£9.59	£4.93	£2.17	£10.73	£53.65
Sainsbury's, Margate Road	£2.77	£4.29	£8.25	£5.04	£4.28	£1.58	£6.55	£32.76
Marks & Spencer, Westwood Cross	£0.29	£0.57	£0.35	£1.12	£0.47	£0.41	£0.80	£4.01
Other Westwood Cross	£0.11	£0.00	£0.00	£0.35	£0.12	£0.00	£0.14	£0.72
Westwood Cross Sub-Total	**£11.31**	**£12.21**	**£19.33**	**£16.10**	**£9.80**	**£4.16**	**£18.23**	**£91.15**
Asda, Westwood Road, Broadstairs	£5.47	£6.75	£12.42	£6.02	£2.33	£1.39	£3.82	£38.22
Other Broadstairs	£0.40	£0.61	£10.44	£0.42	£0.50	£1.03	£0.70	£14.10
Other Zone 3	£0.11	£0.11	£2.34	£0.00	£0.00	£0.29	£0.15	£3.00
Broadstairs Sub-Total	**£5.98**	**£7.47**	**£25.20**	**£6.44**	**£2.83**	**£2.71**	**£4.68**	**£55.31**
Tesco, Manston Road, Ramsgate	£0.33	£0.83	£0.20	£15.96	£1.98	£3.04	£3.94	£26.28
Waitrose, Queen Street, Ramsgate	£0.11	£0.08	£0.65	£6.65	£0.38	£0.55	£1.49	£9.91
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.60	£6.09	£0.00	£0.39	£0.79	£7.86
Asda, Chatham Street, Ramsgate	£0.11	£0.00	£0.40	£5.32	£0.00	£0.00	£0.65	£6.48
Other Ramsgate	£0.55	£0.08	£1.44	£13.02	£0.56	£0.41	£0.85	£16.90
Ramsgate Sub-Total	**£1.09**	**£0.99**	**£3.28**	**£47.05**	**£2.92**	**£4.39**	**£7.71**	**£67.43**
Birchington	£0.00	£0.19	£0.00	£0.00	£5.96	£2.77	£0.47	£9.39
Westgate	£0.00	£1.14	£0.15	£0.00	£3.16	£0.08	£0.24	£4.77
Birchington/Westgate Sub-Total	**£0.00**	**£1.33**	**£0.15**	**£0.00**	**£9.12**	**£2.85**	**£0.71**	**£14.16**
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.09	£2.36	£0.13	£2.58
District Total	**£36.47**	**£37.63**	**£49.60**	**£69.80**	**£28.84**	**£17.39**	**£34.43**	**£274.16**
Canterbury	£0.00	£0.19	£0.10	£0.14	£0.47	£2.46	n/a	£3.36
Dover	£0.00	£0.11	£0.00	£0.00	£0.00	£0.37	n/a	£0.48
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.21	£0.08	n/a	£0.29
Sandwich	£0.00	£0.00	£0.00	£0.07	£0.00	£0.21	n/a	£0.28
Total	**£36.47**	**£37.93**	**£49.70**	**£70.01**	**£29.52**	**£20.51**		**£278.57**

Table 7A: Convenience Expenditure 2021 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2021	**£38.21**	**£39.77**	**£52.11**	**£73.35**	**£30.95**	**£21.49**		**£255.87**
Morrisons, College Walk, Margate	£4.66	£8.35	£0.31	£0.00	£1.42	£0.41	£1.68	£16.84
Aldi, Zion Place, Margate	£2.98	£1.47	£0.21	£0.00	£1.61	£0.11	£0.34	£6.71
Other Margate	£1.26	£4.65	£0.26	£0.00	£0.99	£0.15	£0.38	£7.70
Tesco Metro, Northdown Road, Cliftonville	£8.63	£0.76	£0.73	£0.15	£0.25	£0.00	£0.55	£11.07
Cliftonville	£1.30	£0.12	£0.21	£0.00	£0.00	£0.15	£0.09	£1.87
Other Zones 1/2	£0.11	£1.03	£0.00	£0.07	£0.00	£0.15	£0.07	£1.44
Margate/Cliftonville Sub-Total	**£18.95**	**£16.38**	**£1.72**	**£0.22**	**£4.27**	**£0.97**	**£3.12**	**£45.64**
Tesco Extra, Margate Road	£8.52	£7.71	£11.26	£10.05	£5.17	£2.28	£11.25	£56.23
Sainsbury's, Margate Road	£2.90	£4.49	£8.65	£5.28	£4.49	£1.66	£6.87	£34.34
Marks & Spencer, Westwood Cross	£0.31	£0.60	£0.36	£1.17	£0.50	£0.43	£0.84	£4.21
Other Westwood Cross	£0.11	£0.00	£0.00	£0.37	£0.12	£0.00	£0.15	£0.76
Westwood Cross Sub-Total	**£11.84**	**£12.80**	**£20.27**	**£16.87**	**£10.27**	**£4.36**	**£19.11**	**£95.53**
Asda, Westwood Road, Broadstairs	£5.73	£7.08	£13.03	£6.31	£2.44	£1.46	£4.01	£40.06
Other Broadstairs	£0.42	£0.64	£10.94	£0.44	£0.53	£1.07	£0.74	£14.78
Other Zone 3	£0.11	£0.12	£2.45	£0.00	£0.00	£0.30	£0.16	£3.14
Broadstairs Sub-Total	**£6.27**	**£7.83**	**£26.42**	**£6.75**	**£2.97**	**£2.84**	**£4.90**	**£57.98**
Tesco, Manston Road, Ramsgate	£0.34	£0.87	£0.21	£16.72	£2.07	£3.18	£4.13	£27.53
Waitrose, Queen Street, Ramsgate	£0.11	£0.08	£0.68	£6.97	£0.40	£0.58	£1.56	£10.38
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.63	£6.38	£0.00	£0.41	£0.82	£8.24
Asda, Chatham Street, Ramsgate	£0.11	£0.00	£0.42	£5.57	£0.00	£0.00	£0.68	£6.78
Other Ramsgate	£0.57	£0.08	£1.51	£13.64	£0.59	£0.43	£0.89	£17.71
Ramsgate Sub-Total	**£1.15**	**£1.03**	**£3.44**	**£49.29**	**£3.06**	**£4.60**	**£8.07**	**£70.65**
Birchington	£0.00	£0.20	£0.00	£0.00	£6.25	£2.90	£0.49	£9.84
Westgate	£0.00	£1.19	£0.16	£0.00	£3.31	£0.09	£0.25	£5.00
Birchington/Westgate Sub-Total	**£0.00**	**£1.39**	**£0.16**	**£0.00**	**£9.56**	**£2.99**	**£0.74**	**£14.84**
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.09	£2.47	£0.13	£2.70
District Total	**£38.21**	**£39.45**	**£52.01**	**£73.13**	**£30.24**	**£18.23**	**£36.08**	**£287.33**
Canterbury	£0.00	£0.20	£0.10	£0.15	£0.50	£2.58	n/a	£3.52
Dover	£0.00	£0.12	£0.00	£0.00	£0.00	£0.39	n/a	£0.51
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.22	£0.09	n/a	£0.30
Sandwich	£0.00	£0.00	£0.00	£0.07	£0.00	£0.21	n/a	£0.29
Total	**£38.21**	**£39.77**	**£52.11**	**£73.35**	**£30.95**	**£21.49**		**£291.95**

Table 8A: Convenience Expenditure 2026 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2026	**£40.09**	**£41.71**	**£54.66**	**£76.97**	**£32.46**	**£22.55**		**£268.46**
Morrisons, College Walk, Margate	£4.89	£8.76	£0.33	£0.00	£1.49	£0.43	£1.77	£17.67
Aldi, Zion Place, Margate	£3.13	£1.54	£0.22	£0.00	£1.69	£0.11	£0.35	£7.04
Other Margate	£1.32	£4.88	£0.27	£0.00	£1.04	£0.16	£0.40	£8.08
Tesco Metro, Northdown Road, Cliftonville	£9.06	£0.79	£0.77	£0.15	£0.26	£0.00	£0.58	£11.61
Cliftonville	£1.36	£0.13	£0.22	£0.00	£0.00	£0.16	£0.10	£1.96
Other Zones 1/2	£0.12	£1.08	£0.00	£0.08	£0.00	£0.16	£0.08	£1.52
Margate/Cliftonville Sub-Total	**£19.89**	**£17.19**	**£1.80**	**£0.23**	**£4.48**	**£1.01**	**£3.28**	**£47.88**
Tesco Extra, Margate Road	£8.94	£8.09	£11.81	£10.54	£5.42	£2.39	£11.80	£59.00
Sainsbury's, Margate Road	£3.05	£4.71	£9.07	£5.54	£4.71	£1.74	£7.21	£36.03
Marks & Spencer, Westwood Cross	£0.32	£0.63	£0.38	£1.23	£0.52	£0.45	£0.88	£4.41
Other Westwood Cross	£0.12	£0.00	£0.00	£0.38	£0.13	£0.00	£0.16	£0.79
Westwood Cross Sub-Total	**£12.43**	**£13.43**	**£21.26**	**£17.70**	**£10.78**	**£4.58**	**£20.05**	**£100.23**
Asda, Westwood Road, Broadstairs	£6.01	£7.42	£13.66	£6.62	£2.56	£1.53	£4.20	£42.02
Other Broadstairs	£0.44	£0.67	£11.48	£0.46	£0.55	£1.13	£0.78	£15.50
Other Zone 3	£0.12	£0.13	£2.57	£0.00	£0.00	£0.32	£0.16	£3.29
Broadstairs Sub-Total	**£6.58**	**£8.22**	**£27.71**	**£7.08**	**£3.12**	**£2.98**	**£5.14**	**£60.82**
Tesco, Manston Road, Ramsgate	£0.36	£0.92	£0.22	£17.55	£2.18	£3.34	£4.33	£28.89
Waitrose, Queen Street, Ramsgate	£0.12	£0.08	£0.71	£7.31	£0.42	£0.61	£1.63	£10.89
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.66	£6.70	£0.00	£0.43	£0.86	£8.65
Asda, Chatham Street, Ramsgate	£0.12	£0.00	£0.44	£5.85	£0.00	£0.00	£0.71	£7.12
Other Ramsgate	£0.60	£0.08	£1.59	£14.32	£0.62	£0.45	£0.93	£18.58
Ramsgate Sub-Total	**£1.20**	**£1.08**	**£3.61**	**£51.72**	**£3.21**	**£4.83**	**£8.47**	**£74.13**
Birchington	£0.00	£0.21	£0.00	£0.00	£6.56	£3.04	£0.52	£10.33
Westgate	£0.00	£1.25	£0.16	£0.00	£3.47	£0.09	£0.26	£5.24
Birchington/Westgate Sub-Total	**£0.00**	**£1.46**	**£0.16**	**£0.00**	**£10.03**	**£3.13**	**£0.78**	**£15.57**
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.10	£2.59	£0.14	£2.83
District Total	**£40.09**	**£41.38**	**£54.55**	**£76.74**	**£31.72**	**£19.12**	**£37.86**	**£301.47**
Canterbury	£0.00	£0.21	£0.11	£0.15	£0.52	£2.71	n/a	£3.70
Dover	£0.00	£0.13	£0.00	£0.00	£0.00	£0.41	n/a	£0.53
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.23	£0.09	n/a	£0.32
Sandwich	£0.00	£0.00	£0.00	£0.08	£0.00	£0.23	n/a	£0.30
Total	**£40.09**	**£41.71**	**£54.66**	**£76.97**	**£32.46**	**£22.55**		**£306.31**

Table 9A: Convenience Expenditure 2031 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2031	**£42.19**	**£43.90**	**£57.52**	**£80.98**	**£34.16**	**£23.74**	**n/a**	**£282.48**
Morrisons, College Walk, Margate	£5.15	£9.22	£0.35	£0.00	£1.57	£0.45	£1.86	£18.59
Aldi, Zion Place, Margate	£3.29	£1.62	£0.23	£0.00	£1.78	£0.12	£0.37	£7.41
Other Margate	£1.39	£5.14	£0.29	£0.00	£1.09	£0.17	£0.43	£8.50
Tesco Metro, Northdown Road, Cliftonville	£9.53	£0.83	£0.81	£0.16	£0.27	£0.00	£0.61	£12.22
Cliftonville	£1.43	£0.13	£0.23	£0.00	£0.00	£0.17	£0.10	£2.07
Other Zones 1/2	£0.13	£1.14	£0.00	£0.08	£0.00	£0.17	£0.08	£1.59
Margate/Cliftonville Sub-Total	**£20.92**	**£18.09**	**£1.90**	**£0.24**	**£4.71**	**£1.07**	**£3.45**	**£50.38**
Tesco Extra, Margate Road	£9.41	£8.52	£12.42	£11.09	£5.70	£2.52	£12.42	£62.08
Sainsbury's, Margate Road	£3.21	£4.96	£9.55	£5.83	£4.95	£1.83	£7.58	£37.91
Marks & Spencer, Westwood Cross	£0.34	£0.66	£0.40	£1.30	£0.55	£0.47	£0.93	£4.64
Other Westwood Cross	£0.13	£0.00	£0.00	£0.40	£0.14	£0.00	£0.17	£0.84
Westwood Cross Sub-Total	**£13.08**	**£14.14**	**£22.37**	**£18.63**	**£11.34**	**£4.82**	**£21.09**	**£105.46**
Asda, Westwood Road, Broadstairs	£6.33	£7.81	£14.38	£6.96	£2.70	£1.61	£4.42	£44.22
Other Broadstairs	£0.46	£0.70	£12.08	£0.49	£0.58	£1.19	£0.82	£16.31
Other Zone 3	£0.13	£0.13	£2.70	£0.00	£0.00	£0.33	£0.17	£3.47
Broadstairs Sub-Total	**£6.92**	**£8.65**	**£29.16**	**£7.45**	**£3.28**	**£3.13**	**£5.41**	**£64.00**
Tesco, Manston Road, Ramsgate	£0.38	£0.97	£0.23	£18.46	£2.29	£3.51	£4.56	£30.40
Waitrose, Queen Street, Ramsgate	£0.13	£0.09	£0.75	£7.69	£0.44	£0.64	£1.72	£11.46
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.69	£7.05	£0.00	£0.45	£0.91	£9.10
Asda, Chatham Street, Ramsgate	£0.13	£0.00	£0.46	£6.15	£0.00	£0.00	£0.75	£7.49
Other Ramsgate	£0.63	£0.09	£1.67	£15.06	£0.65	£0.47	£0.98	£19.55
Ramsgate Sub-Total	**£1.27**	**£1.14**	**£3.80**	**£54.42**	**£3.38**	**£5.08**	**£8.92**	**£78.00**
Birchington	£0.00	£0.22	£0.00	£0.00	£6.90	£3.20	£0.54	£10.87
Westgate	£0.00	£1.32	£0.17	£0.00	£3.65	£0.09	£0.28	£5.51
Birchington/Westgate Sub-Total	**£0.00**	**£1.54**	**£0.17**	**£0.00**	**£10.55**	**£3.30**	**£0.82**	**£16.38**
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.10	£2.73	£0.15	£2.98
District Total	**£42.19**	**£43.55**	**£57.40**	**£80.74**	**£33.37**	**£20.13**	**£39.84**	**£317.21**
Canterbury	£0.00	£0.22	£0.12	£0.16	£0.55	£2.85	n/a	£3.89
Dover	£0.00	£0.13	£0.00	£0.00	£0.00	£0.43	n/a	£0.56
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.24	£0.09	n/a	£0.33
Sandwich	£0.00	£0.00	£0.00	£0.08	£0.00	£0.24	n/a	£0.32
Total	**£42.19**	**£43.90**	**£57.52**	**£80.98**	**£34.16**	**£23.74**		**£322.31**

Table 10A: Convenience Floorspace and Benchmark Tunover

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	706	80%	565	£6,148	£3.47
Iceland, College Walk, Margate	569	95%	541	£6,697	£3.62
Marks & Spencer, Canterbury Road	111	95%	106	£10,826	£1.15
Morrisons, College Walk, Margate	2,028	85%	1,724	£12,400	£21.37
Tesco Express, Canterbury Road, Margate	182	95%	173	£12,432	£2.15
Other Town Centre Shops	511	100%	511	£4,000	£2.04
Tesco Metro, Northdown Road, Cliftonville	656	90%	590	£12,432	£7.33
Co-op, Summerfield Road, Cliftonville	199	95%	189	£7,279	£1.38
Total	**4,962**		**4,398**		**£42.52**
Westwood Cross					
Marks & Spencer, Westwood Cross	630	100%	630	£10,826	£6.82
Sainsbury's, Margate Road	3,351	60%	2,011	£12,599	£25.33
Lidl, Margate Road	714	80%	571	£3,030	£1.73
Tesco Extra, Margate Road	8,232	60%	4,939	£12,432	£61.41
Other Town Centre Shops	420	100%	420	£5,000	£2.10
Total	**13,347**		**8,571**		**£97.39**
Broadstairs/St Peters					
Asda, Westwood Road, Broadstairs	4,657	70%	3,260	£14,187	£46.25
Iceland, High Street, Broadstairs	74	95%	71	£6,697	£0.47
Tesco Metro, High Street, Broadstairs	336	90%	302	£12,432	£3.76
Other Town Centre Shops	1,113	100%	1,113	£4,000	£4.45
Co-op, Hopeville Avenue, St Peters	510	95%	484	£7,279	£3.52
Total	**6,690**		**5,230**		**£58.46**
Ramsgate					
Aldi, Boundary Road, Ramsgate	650	80%	520	£6,148	£3.20
Asda, Chatham Street, Ramsgate	687	70%	481	£14,187	£6.82
Co-op, Grange Road, Ramsgate	195	95%	186	£7,279	£1.35
Co-op, Newington Road, Ramsgate	119	95%	113	£7,279	£0.82
Iceland, King Street, Ramsgate	392	95%	373	£6,697	£2.50
Lidl, Margate Road, Ramsgate	1,336	80%	1,069	£3,030	£3.24
Tesco, Manston Road, Ramsgate	3,388	85%	2,880	£12,432	£35.80
Waitrose, Queen Street, Ramsgate	1,361	95%	1,293	£11,475	£14.83
Other Town Centre Shops	1,701	100%	1,701	£4,000	£6.80
Total	**9,830**		**8,615**		**£75.37**
Birchington/Westgate					
Co-op, Station Road, Birchington	274	95%	260	£7,279	£1.89
Co-op, Station Road, Birchington	410	95%	390	£7,279	£2.84
Co-op, Station Road, Westgate on Sea	196	95%	187	£7,279	£1.36
Other Birchington/Westgate	1,680	100%	1,680	£4,000	£6.72
Total	**2,561**		**2,517**		**£12.81**
Other Thanet					
Co-op, Tothill Street, Minster	148	95%	140	£7,279	£1.02
Other Thanet Local Shops	500	100%	500	£4,000	£2.00
Total	**648**		**640**		**£3.02**
GRAND TOTAL	**38,038**		**29,971**	**£9,661**	**£289.56**

Table 11A: Summary of Convenience Turnover 2012 to 2031 (£Million)

Town	2012	2016	2021	2026	2031
Available Expenditure in District					
Margate/Cliftonville	£42.48	£43.54	£45.64	£47.88	£50.38
Westwood Cross	£88.91	£91.15	£95.53	£100.23	£105.46
Broadstairs/St Peters	£53.95	£55.31	£57.98	£60.82	£64.00
Ramsgate	£65.76	£67.43	£70.65	£74.13	£78.00
Birchington/Westgate	£13.81	£14.16	£14.84	£15.57	£16.38
Other Thanet	£2.51	£2.58	£2.70	£2.83	£2.98
Total	**£267.43**	**£274.16**	**£287.33**	**£301.47**	**£317.21**
Benchmark Turnover of Existing Facilities					
Margate/Cliftonville	£42.52	£42.52	£42.52	£42.52	£42.52
Westwood Cross	£97.39	£97.39	£97.39	£97.39	£97.39
Broadstairs/St Peters	£58.46	£58.46	£58.46	£58.46	£58.46
Ramsgate	£75.37	£75.37	£75.37	£75.37	£75.37
Birchington/Westgate	£12.81	£12.81	£12.81	£12.81	£12.81
Other Thanet	£3.02	£3.02	£3.02	£3.02	£3.02
Total	**£289.56**	**£289.56**	**£289.56**	**£289.56**	**£289.56**
Surplus Expenditure					
Margate/Cliftonville	-£0.05	£1.02	£3.11	£5.36	£7.86
Westwood Cross	-£8.48	-£6.24	-£1.85	£2.84	£8.08
Broadstairs/St Peters	-£4.50	-£3.15	-£0.48	£2.37	£5.55
Ramsgate	-£9.60	-£7.94	-£4.72	-£1.23	£2.63
Birchington/Westgate	£1.00	£1.35	£2.03	£2.76	£3.57
Other Thanet	-£0.51	-£0.45	-£0.32	-£0.19	-£0.04
Total	**-£22.13**	**-£15.41**	**-£2.23**	**£11.90**	**£27.65**
Turnover Density for New Floorspace £ psm					
Large food stores	£10,000	£10,000	£10,000	£10,000	£10,000
Local Shops	£4,000	£4,000	£4,000	£4,000	£4,000
Floorspace (sq.m (net))					
Margate/Cliftonville	-5	102	311	536	786
Westwood Cross	-848	-624	-185	284	808
Broadstairs/St Peters	-450	-315	-48	237	555
Ramsgate	-960	-794	-472	-123	263
Birchington/Westgate	100	135	203	276	357
Other Thanet	-127	-111	-81	-47	-10
Total	**-2,290**	**-1,608**	**-271**	**1,162**	**2,759**
Floorspace (sq.m (gross))					
Margate/Cliftonville	-6	146	445	766	1,123
Westwood Cross	-1,211	-892	-265	406	1,154
Broadstairs/St Peters	-643	-449	-68	338	792
Ramsgate	-1,372	-1,135	-674	-176	376
Birchington/Westgate	143	192	290	394	510
Other Thanet	-182	-159	-115	-68	-15
Total	**-3,271**	**-2,296**	**-388**	**1,660**	**3,941**

Sources: Tables 5A to 10A

Appendix 5 Comparison Assessment

Table 1B: Population Projections

Zone Area	2011	2012	2016	2021	2026	2031
Zone 1: Margate East	20,922	21,020	21,415	21,920	22,437	22,965
Zone 2: Margate West	21,914	22,017	22,431	22,959	23,500	24,054
Zone 3: Broadstairs/Westwood	24,647	24,762	25,228	25,823	26,431	27,054
Zone 4: Ramsgate	39,264	39,448	40,190	41,137	42,106	43,099
Zone 5: Westgate/Birchington	15,629	15,702	15,997	16,374	16,760	17,155
Zone 6: Thanet Rural	9,723	9,768	9,952	10,187	10,427	10,672
Total	**132,100**	**132,717**	**135,213**	**138,400**	**141,661**	**145,000**

Sources: Experian MMG3 and Thanet District Council

Table 2B: Comparison Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2016	2021	2026	2031
Zone 1: Margate East	£2,240	£2,448	£2,835	£3,287	£3,810
Zone 2: Margate West	£2,292	£2,505	£2,901	£3,363	£3,899
Zone 3: Broadstairs/Westwood	£2,757	£3,013	£3,489	£4,045	£4,689
Zone 4: Ramsgate	£2,293	£2,506	£2,902	£3,364	£3,900
Zone 5: Westgate/Birchington	£2,447	£2,675	£3,098	£3,591	£4,163
Zone 6: Thanet Rural	£2,892	£3,162	£3,661	£4,244	£4,920

Sources:
Experian local estimates for 2010 comparison goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates
(0.5% 2010-2011, 1.6% 2011-2012, 2.1% 2012-2013 and 3.0% per annum onwards)

Table 3B: Total Available Comparison Goods Expenditure (£M - 2010 Prices)

Zone	2012	2016	2021	2026	2031	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026	Growth 2012-2031
Zone 1: Margate East	£47.08	£52.42	£62.14	£73.75	£87.50	11.3%	32.0%	56.6%	85.8%
Zone 2: Margate West	£50.46	£56.19	£66.61	£79.03	£93.79	11.3%	32.0%	56.6%	85.9%
Zone 3: Broadstairs/Westwood	£68.27	£76.01	£90.10	£106.91	£126.86	11.3%	32.0%	56.6%	85.8%
Zone 4: Ramsgate	£90.45	£100.72	£119.38	£141.65	£168.08	11.3%	32.0%	56.6%	85.8%
Zone 5: Westgate/Birchington	£38.42	£42.79	£50.73	£60.19	£71.42	11.4%	32.0%	56.6%	85.9%
Zone 6: Thanet Rural	£28.25	£31.47	£37.29	£44.25	£52.51	11.4%	32.0%	56.6%	85.9%
Total	**£322.94**	**£359.60**	**£426.24**	**£505.78**	**£600.15**	**11.4%**	**32.0%**	**56.6%**	**85.8%**

Sources: Table 1B and Table 2B

Table 4B: Comparison Shopping Penetration Rates 2012

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

Table 5B: Comparison Expenditure 2012 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2012	**£47.08**	**£50.46**	**£68.27**	**£90.45**	**£38.42**	**£28.25**		**£322.94**
Margate High Street/Old Town	£8.48	£7.01	£2.87	£2.35	£2.73	£0.99	£2.71	£27.14
Westwood Cross	£28.02	£26.85	£37.34	£42.87	£20.10	£13.59	£72.33	£241.09
Broadstairs	£2.78	£4.29	£10.72	£7.78	£0.92	£1.10	£3.07	£30.65
Ramsgate	£1.60	£1.61	£4.51	£24.51	£1.11	£2.94	£4.03	£40.32
Birchington/Westgate	£0.09	£2.88	£0.61	£0.90	£5.80	£1.86	£0.64	£12.80
Other Thanet	£0.19	£0.20	£0.07	£0.18	£0.04	£0.31	£0.05	£1.04
District Total	**£41.15**	**£42.84**	**£56.12**	**£78.60**	**£30.70**	**£20.79**	**£82.83**	**£353.04**
Canterbury	£3.58	£5.55	£7.30	£7.60	£6.03	£5.88	n/a	£35.94
Dover	£0.09	£0.05	£0.27	£0.45	£0.15	£0.20	n/a	£1.22
Deal	£0.05	£0.00	£0.07	£0.09	£0.04	£0.00	n/a	£0.24
Herne Bay	£0.09	£0.10	£0.07	£0.09	£0.12	£0.17	n/a	£0.64
Sandwich	£0.09	£0.05	£0.00	£0.18	£0.00	£0.00	n/a	£0.33
Other Outside District	£2.02	£1.87	£4.44	£3.44	£1.38	£1.21	n/a	£14.36
Total	**£47.08**	**£50.46**	**£68.27**	**£90.45**	**£38.42**	**£28.25**		**£405.77**

Table 6B: Comparison Expenditure 2016 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	**£52.42**	**£56.19**	**£76.01**	**£100.72**	**£42.79**	**£31.47**		**£359.60**
Margate High Street/Old Town	£9.44	£7.81	£3.19	£2.62	£3.04	£1.10	£3.02	£30.22
Westwood Cross	£31.19	£29.89	£41.58	£47.74	£22.38	£15.14	£80.54	£268.46
Broadstairs	£3.09	£4.78	£11.93	£8.66	£1.03	£1.23	£3.41	£34.13
Ramsgate	£1.78	£1.80	£5.02	£27.29	£1.24	£3.27	£4.49	£44.89
Birchington/Westgate	£0.10	£3.20	£0.68	£1.01	£6.46	£2.08	£0.71	£14.25
Other Thanet	£0.21	£0.22	£0.08	£0.20	£0.04	£0.35	£0.06	£1.16
District Total	**£45.82**	**£47.70**	**£62.48**	**£87.52**	**£34.19**	**£23.16**	**£92.23**	**£393.11**
Canterbury	£3.98	£6.18	£8.13	£8.46	£6.72	£6.55	n/a	£40.02
Dover	£0.10	£0.06	£0.30	£0.50	£0.17	£0.22	n/a	£1.36
Deal	£0.05	£0.00	£0.08	£0.10	£0.04	£0.00	n/a	£0.27
Herne Bay	£0.10	£0.11	£0.08	£0.10	£0.13	£0.19	n/a	£0.71
Sandwich	£0.10	£0.06	£0.00	£0.20	£0.00	£0.00	n/a	£0.36
Other Outside District	£2.25	£2.08	£4.94	£3.83	£1.54	£1.35	n/a	£15.99
Total	**£52.42**	**£56.19**	**£76.01**	**£100.72**	**£42.79**	**£31.47**		**£451.83**

Table 7B: Comparison Expenditure 2021 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2021	**£62.14**	**£66.61**	**£90.10**	**£119.38**	**£50.73**	**£37.29**		**£426.24**
Margate High Street/Old Town	£11.19	£9.26	£3.78	£3.10	£3.60	£1.31	£3.58	£35.82
Westwood Cross	£36.98	£35.43	£49.28	£56.59	£26.53	£17.94	£95.46	£318.21
Broadstairs	£3.67	£5.66	£14.14	£10.27	£1.22	£1.45	£4.05	£40.46
Ramsgate	£2.11	£2.13	£5.95	£32.35	£1.47	£3.88	£5.32	£53.21
Birchington/Westgate	£0.12	£3.80	£0.81	£1.19	£7.66	£2.46	£0.84	£16.89
Other Thanet	£0.25	£0.27	£0.09	£0.24	£0.05	£0.41	£0.07	£1.37
District Total	**£54.31**	**£56.55**	**£74.06**	**£103.74**	**£40.53**	**£27.45**	**£109.32**	**£465.96**
Canterbury	£4.72	£7.33	£9.64	£10.03	£7.96	£7.76	n/a	£47.44
Dover	£0.12	£0.07	£0.36	£0.60	£0.20	£0.26	n/a	£1.61
Deal	£0.06	£0.00	£0.09	£0.12	£0.05	£0.00	n/a	£0.32
Herne Bay	£0.12	£0.13	£0.09	£0.12	£0.15	£0.22	n/a	£0.84
Sandwich	£0.12	£0.07	£0.00	£0.24	£0.00	£0.00	n/a	£0.43
Other Outside District	£2.67	£2.46	£5.86	£4.54	£1.83	£1.60	n/a	£18.96
Total	**£62.14**	**£66.61**	**£90.10**	**£119.38**	**£50.73**	**£37.29**		**£535.57**

Table 8B: Comparison Expenditure 2026 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2026	**£73.75**	**£79.03**	**£106.91**	**£141.65**	**£60.19**	**£44.25**		**£505.78**
Margate High Street/Old Town	£13.27	£10.99	£4.49	£3.68	£4.27	£1.55	£4.25	£42.51
Westwood Cross	£43.88	£42.05	£58.48	£67.14	£31.48	£21.28	£113.28	£377.59
Broadstairs	£4.35	£6.72	£16.79	£12.18	£1.44	£1.73	£4.80	£48.01
Ramsgate	£2.51	£2.53	£7.06	£38.39	£1.75	£4.60	£6.31	£63.14
Birchington/Westgate	£0.15	£4.50	£0.96	£1.42	£9.09	£2.92	£1.00	£20.04
Other Thanet	£0.29	£0.32	£0.11	£0.28	£0.06	£0.49	£0.08	£1.63
District Total	**£64.46**	**£67.10**	**£87.88**	**£123.09**	**£48.09**	**£32.57**	**£129.72**	**£552.91**
Canterbury	£5.60	£8.69	£11.44	£11.90	£9.45	£9.20	n/a	£56.29
Dover	£0.15	£0.08	£0.43	£0.71	£0.24	£0.31	n/a	£1.91
Deal	£0.07	£0.00	£0.11	£0.14	£0.06	£0.00	n/a	£0.38
Herne Bay	£0.15	£0.16	£0.11	£0.14	£0.18	£0.27	n/a	£1.00
Sandwich	£0.15	£0.08	£0.00	£0.28	£0.00	£0.00	n/a	£0.51
Other Outside District	£3.17	£2.92	£6.95	£5.38	£2.17	£1.90	n/a	£22.50
Total	**£73.75**	**£79.03**	**£106.91**	**£141.65**	**£60.19**	**£44.25**		**£635.50**

Table 9B: Comparison Expenditure 2031 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2031	**£87.50**	**£93.79**	**£126.86**	**£168.08**	**£71.42**	**£52.51**		**£600.15**
Margate High Street/Old Town	£15.75	£13.04	£5.33	£4.37	£5.07	£1.84	£5.04	£50.44
Westwood Cross	£52.06	£49.90	£69.39	£79.67	£37.35	£25.26	£134.41	£448.04
Broadstairs	£5.16	£7.97	£19.92	£14.46	£1.71	£2.05	£5.70	£56.96
Ramsgate	£2.97	£3.00	£8.37	£45.55	£2.07	£5.46	£7.49	£74.92
Birchington/Westgate	£0.17	£5.35	£1.14	£1.68	£10.78	£3.47	£1.19	£23.78
Other Thanet	£0.35	£0.38	£0.13	£0.34	£0.07	£0.58	£0.10	£1.93
District Total	**£76.47**	**£79.63**	**£104.28**	**£146.07**	**£57.06**	**£38.65**	**£153.93**	**£656.08**
Canterbury	£6.65	£10.32	£13.57	£14.12	£11.21	£10.92	n/a	£66.79
Dover	£0.17	£0.09	£0.51	£0.84	£0.29	£0.37	n/a	£2.27
Deal	£0.09	£0.00	£0.13	£0.17	£0.07	£0.00	n/a	£0.45
Herne Bay	£0.17	£0.19	£0.13	£0.17	£0.21	£0.32	n/a	£1.19
Sandwich	£0.17	£0.09	£0.00	£0.34	£0.00	£0.00	n/a	£0.60
Other Outside District	£3.76	£3.47	£8.25	£6.39	£2.57	£2.26	n/a	£26.69
Total	**£87.50**	**£93.79**	**£126.86**	**£168.08**	**£71.42**	**£52.51**		**£754.08**

Table 10B: Comparison Floorspace and Benchmark Turnover

Location	Floorspace sq.m gross	Sales Floorspace sq.m net	Turnover Density £ per sq.m net	Total Turnover £M
Margate comparison shops	13,700	8,220	£4,000	£32.88
Westwood Cross Shopping Centre	35,500	26,625	£5,000	£133.13
Westwood Cross Retail Parks	38,000	30,400	£2,500	£76.00
Tesco Extra, Westwood Cross	n/a	3,293	£8,975	£29.55
Sainsbury's, Westwood Cross	n/a	1,340	£7,986	£10.70
Broadstairs comparison shops	7,700	4,620	£4,000	£18.48
Asda, Broadstairs	n/a	1,397	£8,401	£11.74
Ramsgate comparison shops	22,000	13,200	£4,000	£52.80
Birchington/Westgate comparison shops	6,910	4,146	£4,000	£16.58
GRAND TOTAL	n/a	**93,241**		**£381.86**

Table 11B: Summary of Comparison Floorspace Capcity 2012 to 2031

Town	2012	2016	2021	2026	2031
Available Expenditure in District					
Margate/Cliftonville	£27.14	£30.22	£35.82	£42.51	£50.44
Westwood Cross	£241.09	£268.46	£318.21	£377.59	£448.04
Broadstairs	£30.65	£34.13	£40.46	£48.01	£56.96
Ramsgate	£40.32	£44.89	£53.21	£63.14	£74.92
Birchington/Westgate	£12.80	£14.25	£16.89	£20.04	£23.78
Other Thanet	£1.04	£1.16	£1.37	£1.63	£1.93
Total	**£353.04**	**£393.11**	**£465.96**	**£552.91**	**£656.08**
Benchmark Turnover of Existing Facilities					
Margate/Cliftonville	£32.88	£35.17	£38.27	£41.63	£45.29
Westwood Cross	£249.38	£266.78	£290.24	£315.76	£343.53
Broadstairs	£30.22	£32.32	£35.17	£38.26	£41.62
Ramsgate	£52.80	£56.48	£61.45	£66.85	£72.73
Birchington/Westgate	£16.58	£17.74	£19.30	£21.00	£22.84
Other Thanet	£1.04	£1.11	£1.21	£1.32	£1.43
Total	**£382.90**	**£409.61**	**£445.63**	**£484.82**	**£527.45**
Surplus/Deficit Expenditure					
Margate/Cliftonville	-£5.74	-£4.95	-£2.45	£0.87	£5.14
Westwood Cross	-£8.29	£1.68	£27.97	£61.83	£104.51
Broadstairs	£0.44	£1.81	£5.29	£9.75	£15.34
Ramsgate	-£12.48	-£11.59	-£8.24	-£3.71	£2.19
Birchington/Westgate	-£3.79	-£3.49	-£2.41	-£0.96	£0.94
Other Thanet	£0.00	£0.05	£0.16	£0.31	£0.50
Total	**-£29.86**	**-£16.50**	**£20.33**	**£68.09**	**£128.62**
Turnover Density for New Floorspace (£ per sq.m)	£5,000	£5,349	£5,819	£6,331	£6,888
Sales Floorspace (sq.m net)					
Margate/Cliftonville	-1,148	-991	-489	175	1,029
Westwood Cross	-1,658	336	5,594	12,365	20,902
Broadstairs	88	362	1,058	1,950	3,068
Ramsgate	-2,496	-2,318	-1,647	-743	438
Birchington/Westgate	-758	-698	-482	-191	187
Other Thanet	0	9	32	62	100
Total	**-5,973**	**-3,300**	**4,066**	**13,618**	**25,725**
Floorspace (sq.m gross)					
Margate/Cliftonville	-1,531	-1,321	-652	233	1,372
Westwood Cross	-2,211	448	7,459	16,487	27,870
Broadstairs	117	482	1,411	2,599	4,091
Ramsgate	-3,328	-3,090	-2,197	-990	584
Birchington/Westgate	-1,010	-931	-643	-255	250
Other Thanet	0	12	43	83	133
Total	**-7,964**	**-4,400**	**5,422**	**18,157**	**34,300**

Sources: Tables 5B to 10B

Appendix 6 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the Thanet study area in July 2012. The study area was split into six zones, based on postcode sectors.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - Other non-food items (eg. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the main destination for respondents' last main food shopping trip across the study area. Overall, the Tesco Extra foodstore at Westwood Cross was the most popular shopping destination (23.6%), followed by Asda, Broadstairs (17%), Sainsbury's in Broadstairs (13.4%) and Tesco in Ramsgate (12.3%) for the study area as a whole, though different zones recorded different responses as the most popular destination for their main food shopping trip:

- **Zone 1 – Margate East:** Tesco Extra, Westwood Cross (28.3%), followed by Asda, Broadstairs (18.3%), Tesco Metro, Cliftonville (19.2%) and Morrisons, Margate (12.5%);
- **Zone 2 – Margate West:** Morrisons, Margate (25.0%), Tesco Extra, Westwood Cross (24.2%) followed by Asda, Broadstairs (23.3%) and Sainsbury's Broadstairs (13.3%);
- **Zone 3 – Broadstairs/Westwood:** Asda, Broadstairs (32.1%), followed by Tesco Extra, Westwood Cross (29.3%) and Sainsbury's, Broadstairs (21.4%);
- **Zone 4 – Ramsgate:** Tesco, Ramsgate (27.3%), followed by Tesco Extra, Westwood (20.0%) and Waitrose, Ramsgate (11.8%);
- **Zone 5 – Westgate/Birchington:** Sainsbury's Broadstairs (23.0%) and Tesco Extra, Broadstairs (23.0%) followed by Co-op, Birchington (13.0%);

- **Zone 6: – Thanet Rural:** Tesco, Ramsgate (23.0%), followed by Tesco Extra, Westwood (18.0%), Sainsbury's, Broadstairs (13.0%) and Asda, Broadstairs (11.0%).

Overall, 2.0% of respondents chose to do their last main food shopping on the internet and have it delivered, which is slightly higher than the average derived from similar NLP surveys across the country (1.5%).

Mode of Travel for Main Food Shopping

In the whole study area, 81.4% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). A lower proportion walk to their main food shopping destination (8.3%) compared to the NLP average of 11.7%, and again a slightly lower proportion of households travel by bus (7.3%) compared to the NLP averages derived from other surveys of 8.6%. The number of all respondents (0.3%) using a bike to travel to their last main shopping location is also lower than the NLP average of 0.5%. These differences when compared with NLP's national average generally reflect lower levels of public transport usage within more rural districts with market towns when compared with major cities and metropolitan authorities.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 82% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

The overall results show that, while the main food stores remain dominant, top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall – Asda, Broadstairs, and Tesco Extra, Westwood accounting for just 5.1% and 5.3% of trips respectively. "Local shops" in the Study Area account for 20.2% of all responses.

Local Shops and Services

Respondents were asked which town or village they visit most frequently to use local shops and services. Overall, the most popular destinations were Ramsgate (27.9%), Broadstairs (18.4%), Margate High Street and Old Town (12.2%), Westwood Cross (11.1%) and Birchington (9.9%). Different zones recorded different responses as the most popular destination for local shops and services, as follows:

- **Zone 1 – Margate East:** Margate High Street (25.8%), followed by Westwood Cross (24.2%), Cliftonville (22.5%) and Broadstairs (9.2%);
- **Zone 2 – Margate West:** Margate High Street (33.3%), followed by Westwood Cross (17.5%), Westgate (12.5%) and Margate Old Town (10.0%);

- **Zone 3 – Broadstairs/Westwood:** Broadstairs (76.4%) followed by Westwood Cross (7.9%);
- **Zone 4 – Ramsgate:** Ramsgate (82.7%) followed by Westwood Cross (7.3%);
- **Zone 5 – Westgate/ Birchington:** Birchington (48.0%) followed by Westgate (36.0%);
- **Zone 6: – Thanet Rural:** Birchington and Minster (27.0% each) followed by Ramsgate (23.0%).

The results demonstrate that the main centres in and around the study area provide for the local shopping and service requirements of local residents and smaller centres have less of a role in meeting these needs.

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Westwood Cross was the most popular destination with 47.4% of all respondents shopping there, followed by Ramsgate (18.9%), Broadstairs (10.3%), Canterbury (5.8%) and Margate High Street (4.5%). This clearly demonstrates that the majority of non food shopping is carried out within the district.

Westwood Cross is the most popular destination for non-food shopping in all zones (ranging from 43.0% within Zone 6 to 59.2% in Zone 1) excluding Zone 4 (Ramsgate) where Ramsgate is the most popular destination (50.5%). Westwood Cross is the second most popular destination in the Ramsgate Zone (30.5%).

Overall 3.6% of respondents buy their non-food shopping on the internet or have it delivered. The Westgate/ Birchington zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/have it delivered (5.0%).

Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 70.8% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (12.8%) followed by walking (9.9%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping.

Clothing/footwear: the most popular destination was Westwood Cross (53.9%), followed by Canterbury (9.9%), Ramsgate (7.5%) and then on the internet (7.3%).

Electrical goods: the most popular destinations where respondents last purchased domestic electrical appliances such as fridges or kitchen items were Westwood Cross (46.9%), followed by on the internet (12.3%) and Broadstairs (5.9%).

Westwood Cross was also the most popular response as the location respondents last bought other kinds of electrical goods, such as TVs, Hi-Fis and computers, with 47.4% of all respondents, followed by on the internet (14.0%) and Ramsgate (5%).

Furniture/furnishings/floor coverings: Westwood Cross was the most popular destination for furniture, furnishings and floor coverings (30.1% of all respondents), followed by Ramsgate (11.8%) and Canterbury (8.8%). 5.9% of respondents last bought furniture, soft furnishings or floor coverings on the internet/mail order.

DIY/hardware/garden items: the most popular destination in the study area respondents last shopped at for DIY/hardware and garden items was Westwood Cross (52.8% of all respondents), followed by Ramsgate (12.3%) and Broadstairs (7.1%). Only 1.5% of respondents last bought DIY/hardware and garden items on the internet/mail order.

Pharmaceutical/health/beauty items: Westwood Cross was the most popular destination (26.3%), closely followed by Ramsgate (20.6%), Broadstairs (14.5%) and Margate High Street (10.0%). 2.4% of respondents last bought pharmaceutical, health and beauty items on the internet/mail order.

Books, CDs, toys and gifts: 37.0 of all respondents last bought "other" items such as books, CDs, toys and gifts from Westwood Cross. The next most popular option was on the internet (24.5%), followed by Ramsgate (8.4%).

Table 6.1 shows the shopping destination with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

Table 6.1: Destinations with Highest Proportion of Response

Zone	Margate East	Margate West	Broadstairs/ Westwood	Ramsgate	Westgate/ Birchington	Thanet Rural
Clothing/Footwear	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross
Domestic Appliances	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross
Electrical Goods	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross
Furniture/Carpets	Westwood Cross	Westwood Cross	Westwood Cross	Ramsgate	Westwood Cross	Westwood Cross
DIY/Hardware	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross
Chemist/Beauty	Westwood Cross	Margate	Broadstairs	Ramsgate	Westwood Cross	Westwood Cross
Books/CDs/Toys/Gifts	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross	Westwood Cross

Source: NEMS Household Survey, July 2012

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. The most popular response was "other" goods including books, CDs and toys (37.8%), followed by clothing and shoes (15.6%) and electrical goods including TV, Hi-Fi and computers (12.9%). 47.9% stated that they did not regularly buy items on the internet.

Town/District Centre Performance

Residents were asked if there was anything that would make them visit the town centres in the District more often.

Westwood Cross

Over half of respondents (50.5%) stated that nothing would make them shop more often at Westwood Cross. In terms of changes that could be made, "more traffic free areas/ pedestrianisation" was the most popular response (7.65), followed by "better road access" and "better choice of shops in general" (6.5% each). Other responses included "more car parking" (5.8%), "undercover shopping" (4.3%) "less traffic congestion" and "improved bus services" (3.1% each).

Margate Old Town

Over 48% of respondents stated that "nothing in particular" or that they did not know what would make the visit Margate Old Town more often. Issues relating to the number, type, range and quality of shops were raised by 45.1% of all respondents, the highest number of which stated the need to "a better choice of shops in general" (30.5%). 6% respondents stated that "free car parking" would make them visit the centre more often.

Margate High Street

Over 61% of all respondents states that issues relating to the number, type, range and quality of shops would make them visit the centre more often, the highest number of which responded that a "better choice of shops in general" (43.8%). Around 40% of respondents stated "nothing in particular" or that they did not know what would make them visit Margate High Street more often. "Better maintenance/ cleanliness" was given as a reason by 7.1% of respondents, closely followed by "free car parking" (6.0%) and "more car parking" (3.4%).

Ramsgate

62.5% of all respondents stated that "nothing in particular" or that they did not know what would make them visit Ramsgate more often. Having a better choice and quality of shops in general was given as a reason by 25.9% of respondents. Other issues raised when asked this question included "free car parking" (5.9%), "more car parking" (3.6%), and "better maintenance and cleaning" (4.6%).

Broadstairs

Just under 70% responded that "nothing" would make them visit Broadstairs more often. 7.6% responded that having a "better quality of shops in general" would make them visit the centre more often. Other responses include "more car parking" (7%) and "free car parking" (6.9%).

Community Facilities

71% of respondents indicated that their household uses community facilities such as libraries and community halls. The main destination for such facilities was Ramsgate (17.5%) followed by Margate (15.3%) and Broadstairs (13.6%). Generally, people use community facilities at their closest centre.

Leisure Activities

Cinema

Respondents were asked which cinema they or their family last visited. 70.5% of respondents indicated that they visit the cinema which was the second most popular leisure activity after restaurants. This is higher than NLP's average derived from similar surveys across the Country (51.0%). Of those respondents that visited the cinema, the most popular destination was Vue, Westwood Cross (42.9%) followed by the Carlton Cinema, Westgate-on-Sea (14.6%). Most of the respondents who visited the Westgate-on-Sea cinema were from the Westgate/Birchington area while visits to the Westwood Cross cinema were from across the study area.

Theatre

Nearly 66% of respondents indicated that they visited theatres, and this is the third most popular leisure activity. This figure is higher than NLP's average for other surveys of 42.5%. When asked where they had lasted visited the theatre, Canterbury (22.6%) and London (20.5%) were the most popular locations. Within the catchment area itself the Theatre Royal in Margate (6.9%), the Winter Gardens, Margate (6.8%) and the Granville Theatre and Cinema, Ramsgate (3.1%) were the most popular locations. When asked about any other theatres which they had visited in the past year London (16.5%) and Canterbury (11.4%) were again the most popular responses, while within the catchment area the Theatre Royal in Margate (6.3%), the Winter Gardens, Margate (5.9%) and the Granville Theatre and Cinema, Ramsgate (4.0%) were the most popular destinations.

Pubs/Bars

The household survey asked respondents if and where they or their family last visited a pub/bar and 63.4% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%) Overall, Ramsgate (16.3%) and Broadstairs (11.8%) where the most popular destinations. However, most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 16.3% of people who visited a pub/bar in Ramsgate 74% of those people came from the Ramsgate zone.

Restaurants

Overall 88% of respondents indicated they visit restaurants which is the most popular leisure activity, and this is higher than the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Broadstairs attracted the highest proportion of respondents (19.8%) flowed by Westwood Cross (15.6%) and Ramsgate (13.6%).

Nightclubs

Only 7% of respondents indicated that they had visited nightclubs, which makes it the least popular leisure activity. However, the sample of nightclub visitors within each zone is relatively small. This participation rate is slightly lower than figure derived by NLP average from other similar surveys of 9.9%. The main location for respondents who last visited nightclubs in the study area as a whole is Ramsgate (3.9%), followed by Margate (1.1%).

Bingo

Bingo facilities were visited by 16.6% of respondents. This figure is above the NLP average participation rate of 5.1% as derived from other similar surveys. The sample of bingo visitors within each zone is again relatively small. Westwood Cross (13.6%) was the most popular place respondents went to play Bingo followed by Margate (1.6%).

Health and Fitness Clubs

23% of respondents indicated their household visited health clubs/gyms, which is slightly lower than the NLP average for other surveys (25.6%). The main health club and gym destinations for respondents were facilities in Westwood Cross (6.5%) and Broadstairs (6.0%).

Tenpin Bowling

Overall 24.9% of respondents indicated their household visit tenpin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are AMF, Margate (17.0%) and Bugsys, Margate (5.8%).

Art Galleries/Museums

Art Galleries/Museums were visited by 58.1% of respondents. The main attraction which people last chose to visit was the Turner Contemporary Gallery, Margate (37.5%) followed by London (11.5%). When asked if there where any other Art Galleries and Museums which the respondents had visited in the last year London (16.3%) was the most popular followed by the Turner Contemporary Gallery, Margate (7.1%).

Appendix 7 In-Centre Survey Results

In-Centre Survey of Visitors to Main Centres

An in-centre survey of 200 visitors was undertaken within the four main shopping centres, with 50 interviews in each town centre of Westwood Cross, Margate, Ramsgate and Broadstairs.

The survey was undertaken to provide information on the role each town centre plays, and the reasons why visitors come to each centre. Visitors were also asked a range of questions relating to their use of the centre and their views on how the centres could be improved. These results have provided valuable information, which has been used in the town centre health checks undertaken in this study. The respondents were asked:

a the purpose of their visit;

b what else they will be doing that day;

c whether they intend to do any shopping;

d what they intended to buy;

e how much they would spend in the centre;

f how they travelled to the centre;

g how long they intended to stay in the centre;

h how often they visit the centre;

i reasons for visiting the centre;

j likes and dislikes about the centre;

k what improvements they would like to see; and

l views on leisure, arts and cultural facilities.

Main Purpose of Visit to the Centres

The in-centre survey results are not directly comparable with the household survey. The in-centre surveys were undertaken during the daytime and interviews were conducted in the main shopping areas and therefore the result may overstate the importance of shopping and understate other reasons for visiting the town centres.

Notwithstanding the above, the main purpose for visiting Ramsgate (38.0%) and Margate (36.0%) was to undertake food shopping (22.5%). Non-food shopping only was the main purpose for visits to Westwood Cross (48.0%). For Broadstairs, the main purpose for visiting was for tourism (36.0%), followed by food shopping (14.0%). Margate and Ramsgate had the highest proportion of the main purpose of the visit to use services, eg. bank, post office, hairdresser (6.0%). Margate and Broadstairs had the highest proportion of respondents using the centre for social/leisure purposes (6.0%), however as indicated above the proportion of leisure related visitors has probably been understated in the survey results.

Table 7.1: Main Purpose of Visit to Centre

Reason for Visit	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Shopping for food only	38.0	14.0	36.0	14.0
Shopping for non-food goods only	22.0	4.0	16.0	48.0
Shopping for both food and non-food	4.0	8.0	10.0	10.0
Window shopping	4.0	0.0	4.0	12.0
To visit the market	10.0	0.0	0.0	0.0
To visit a restaurant/ café/public house	0.0	6.0	6.0	4.0
To have a walk/stroll around	10.0	14.0	12.0	4.0
To use services eg. bank, PO, hairdresser	6.0	2.0	6.0	0.0
Work/business purposes	2.0	2.0	2.0	2.0
Healthcare eg. doctor, dentist, optician	0.0	0.0	0.0	0.0
Social/leisure eg. meeting friends, gym	4.0	6.0	8.0	4.0
Tourism, eg. holiday, day trip	0.0	36.0	0.0	2.0
Other	0.0	0.0	0.0	0.0
Don't know	0.0	8.0	0.0	0.0

Source: Question 2, NEMS Survey, July 2012

N.B – May not sum to 100% as more than one response may be given

Other Purpose of Visit

Respondents were asked what else they would be doing in the centre, aside from the main purpose of their visit. In each centre, the most common response was either that they would be doing nothing other than the main purpose for their visit or that they did not know (39.5%). The next most popular responses in Margate were to have a walk (26.0%) and to visit a restaurant/ café/public house (12.0%). In Broadstairs, the next most popular response was no other purpose (32.0%). In Ramsgate, other popular responses were to visit the market (28.0%) and non-food goods shopping (18.0%). In Westwood Cross, shopping for no other purpose was the next most popular response (16.0%).

Intended Visitor Purchases

Of those respondents who intended to purchase goods during their visit, 58.0% intended to buy food and grocery items. This figure was highest in Margate (76.5%) and lowest in Westwood Cross with 30.0% of respondents. The intended purchases of respondents are shown in Table 7.2.

Table 7.2: Intended Purchases

Intended Purchases	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Food and groceries	68.4	63.2	76.5	30.0
Newspapers/magazines	15.8	0.0	5.9	2.5
Confectionery/tobacco	21.1	21.1	2.9	5.0
Clothing/footwear	5.3	26.3	23.5	62.5
Furniture/carpets/soft furnishings	0.0	0.0	0.0	0.0
Domestic electrical goods	2.6	0.0	2.9	0.0
Other electrical goods (TV, hi-fi etc)	0.0	0.0	0.0	0.0
DIY/hardware/gardening	2.6	0.0	0.0	2.5
Other household goods	26.3	5.3	14.7	10.0
Gifts/jewellery/china and glass	0.0	0.0	2.9	10.0
Books/CDs/videos/toys/ hobbies	10.5	0.0	0.0	2.5
Health/beauty/chemist items	13.2	0.0	20.6	17.5
Other	0.0	0.0	0.0	0.0
Don't know	2.6	10.5	2.9	2.5

Source: Question 4, NEMS Survey, July 2012

N.B – May not sum to 100% as more than one response may be given

In Ramsgate, Broadstairs and Margate, most people intended to buy food and groceries. In Westwood Cross, clothing and footwear (62.5%) was the main intended purchase, followed by food and groceries (30.0%). A significant proportion of respondents in Ramsgate intended to buy other household goods (26.3%) and confectionery/tobacco (21.1%). While in Margate 20.6% of respondents where buying health/beauty/chemist items which was the second most popular response. In Broadstairs a significant proportion of respondents stated clothing and footwear (26.3%) as their second intended purchase.

Expenditure During Visit

Visitors were asked to estimate how much they would spend during their visit to the centres. The results are shown in Table 7.3 and 7.4. The average spend on food shopping is highest in Margate district centre (£19.7), followed by Westwood Cross (£19.0). Ramsgate (£14.7) and Broadstairs (£13.2) have a lower average spend for food shopping.

Table 7.3: Food and Grocery Expenditure within the Centres

Food and Grocery Expenditure	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing	23.7	5.3	11.8	32.5
Less than £5.00	0.0	10.5	0.0	0.0
£5.01-£10.00	13.2	26.3	8.8	0.0
£10.01-£20.00	39.5	15.8	35.3	12.5
£20.01-£30.00	7.9	15.8	20.6	5.0
£30.01-£40.00	7.9	5.3	2.9	7.5
£40.01-£50.00	0.0	0.0	5.9	2.5
£50.01-£75.00	0.0	0.0	0.0	2.5
£75.01-£100.00	2.6	0.0	2.9	5.0
£100.01-£150.00	0.0	0.0	0.0	0.0
More than £150	0.0	0.0	0.0	0.0
Don't know/refused	5.3	21.1	11.8	32.5
Average per visitor (£)	**14.7**	**13.2**	**19.7**	**19.0**

Source: Question 5 NEMS Survey, July 2012

The average non-food spend in Westwood Cross (£37.4) was significantly higher than Ramsgate (£10.8), Margate (£14.6) and Broadstairs (£3.8) as shown in Table 7.4.

Table 7.4: Non-Food Expenditure within the Centres

Non Food Expenditure	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing	18.4	26.3	29.4	2.5
Less than £5.00	5.4	0.0	2.9	0.0
£5.01-£10.00	34.2	10.5	14.7	2.5
£10.01-£20.00	21.1	5.3	20.6	25.0
£20.01-£30.00	7.9	0.0	5.9	15.0
£30.01-£40.00	2.6	0.0	0.0	17.5
£40.01-£50.00	2.6	0.0	5.9	10.0
£50.01-£75.00	0.0	0.0	0.0	5.0
£75.01-£100.00	0.0	0.0	0.0	2.5
£100.01-£150.00	0.0	0.0	2.9	2.5
More than £150	0.0	0.0	0.0	2.5
Don't know/refused	7.9	57.9	17.6	15.0
Average per visitor (£)	**10.8**	**3.8**	**14.6**	**37.4**

Source: Question 5 NEMS Survey, July 2012

All the centres had a low average spend per visitor for eating and drinking out, as set out in Table 7.5. However, it should be noted that only respondents who stated that they would be shopping during their visit were asked these questions, and as such the spending on eating/drinking out is likely to be underestimated, and accounts for the high proportion of respondents who answered that they would not be spending anything. In addition, as indicated earlier this daytime survey has under-estimated the importance of eating and drinking out in the centres.

Table 7.5: Expenditure on eating/drinking out within the Centres

Eating/Drinking Out Expenditure	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing	39.5	10.5	47.1	27.5
Less than £5.00	10.5	5.3	11.8	10.0
£5.01-£10.00	39.5	10.5	8.8	22.5
£10.01-£20.00	0.0	5.3	0.0	2.5
£20.01-£30.00	0.0	0.0	0.0	0.0
£30.01-£40.00	0.0	0.0	0.0	0.0
£40.01-£50.00	0.0	0.0	2.9	0.0
£50.01-£75.00	0.0	0.0	0.0	0.0
£75.01-£100.00	0.0	0.0	0.0	0.0
£100.01-£150.00	0.0	0.0	0.0	0.0
More than £150	0.0	0.0	0.0	0.0
Don't know/refused	10.5	68.4	29.4	37.5
Average per visitor (£)	**3.60**	**5.42**	**3.23**	**3.70**

Source: Question 5 NEMS Survey, July 2012

In all centres between a quarter and half of respondents were intending to eat or drink, use leisure or entertainment facilities during their visit. In Margate 26.0% of visitors were intending to undertake such activities. The highest proportion was in Ramsgate with 44.0% responding to partaking in such activities, while this figure was lower in Broadstairs and Westwood Cross (28.0% each). Of those who did intend to visit any leisure/entertainment facilities the most popular activity in all centres was to visit a restaurant/café (90.4%).

Mode of Travel

The majority of visitors who travelled to Ramsgate, Broadstairs and Margate walked, while in Westwood Cross the most popular mode of travel was by car. The high proportion of visitors travelling to Ramsgate, Broadstairs and Margate centres by foot suggests that these centres have a relatively localised catchment. A significant proportion of visitors to Ramsgate, Margate and Westwood Cross travelled by bus/coach.

The in-centre surveys suggest a higher proportion of visitors walk to the town centres, and a lower proportion travel by car than the household survey results, which may be explained by the higher frequency of trips made to the town centres on foot, ie. frequent day to day trips to the town centre are more likely to be made on foot, whilst more infrequent shopping trips (eg. bulk food shopping) are made predominantly by car.

Table 7.6: Mode of Travel

Mode of Travel	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Car driver	18.0	36.0	12.0	52.0
Car passenger	10.0	14.0	4.0	10.0
Bus/coach	32.0	4.0	20.0	26.0
Train/	0.0	4.0	6.0	0.0
Taxi	0.0	0.0	6.0	0.0
Walked	36.0	42.0	48.0	10.0
Bicycle	2.0	0.0	4.0	2.0
Mobility scooter	2.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0

Source: Question 8 NEMS Survey, July 2012

Other Shopping Destinations

Respondents were asked which other shopping centres they regularly use (i.e. at least every three months), as shown in Table 7.7. The results indicate that other shopping centres outside Thanet apart from Canterbury are generally not important alternative shopping destinations. Canterbury is an important shopping destination with a total of 34.5% of respondents from all centres stating they regularly shop there.

Table 7.7: Other Regular Shopping Destinations

Shopping Centre/Town	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
No other centre	22.0	36.0	10.0	10.0
Birchington	4.0	2.0	14.0	12.0
Broadstairs	22.0	0.0	34.0	22.0
Canterbury	26.0	14.0	48.0	50.0
Cliftonville	10.0	4.0	20.0	22.0
Deal	0.0	0.0	6.0	2.0
Dover	0.0	2.0	2.0	2.0
Herne Bay	10.0	2.0	14.0	6.0
Margate – Old Town	4.0	6.0	16.0	10.0
Margate – High Street	4.0	6.0	22.0	40.0
Minster	0.0	0.0	0.0	0.0
Ramsgate	0.0	22.0	38.0	44.0
Sandwich	2.0	2.0	0.0	8.0
St Peters	2.0	4.0	0.0	2.0
Westbrook	0.0	0.0	0.0	0.0
Westgate	6.0	0.0	12.0	10.0
Westwood Cross	44.0	16.0	48.0	0.0
Whitstable	6.0	4.0	8.0	6.0
Other	0.0	0.0	0.0	0.0
Ashford	2.0	2.0	0.0	2.0
Bexleyheath	0.0	0.0	2.0	2.0
Bluewater	0.0	4.0	0.0	0.0
Folkestone	0.0	0.0	0.0	4.0
Forest Hill	2.0	0.0	0.0	0.0
Don't know	10.7	3.7	4.0	0.0

Source: Question 9, NEMS Survey, July 2012 N.B – May not sum to 100% as more than one response may be given

A high proportion of respondents in Broadstairs (16.0%), Margate (48.0%) and Ramsgate (44.0%) also stated that they regularly shop in Westwood Cross, implying the attraction of Westwood Cross as the highest order centre in the

District. However, Ramsgate was just only slightly less popular, implying that it is also highly valued in the District.

Respondents who answered the questionnaire in Margate were asked whether they were intending to visit Margate High Street/Margate Old Town to establish the number of linked trips between these two parts of the town centre. 70.0% of respondents who where in Margate Old Town were planning on Visiting Margate High Street, while 60.0% of respondents in Margate High Street were planning to visit Margate Old Town.

Duration of Visit

Table 7.8 shows the time visitors intended to spend in each centre. The highest proportion of people in Broadstairs spent over 3 hours in the centre. In Margate, the highest proportion spent just 31 minutes – under 1 hour in the centre. The highest proportion in Ramsgate spent 1 - 1.5 hours and the highest proportion at Westwood Cross spent over 1.5 - under 2 hours in the centre. Respondents spent the longest time on average in Broadstairs (165 minutes) and the least amount of time in Ramsgate (82 minutes). The average length of stay appears to be mainly linked with the range and choice of shops and services available within each town centre, ie. the more facilities the longer customers tend to stay. However, the exception to this is Broadstairs which is clearly affected with the town being a tourist destination.

Table 7.8: Duration of Visit

Time	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
0 – 15 min	0.0	0.0	4.0	2.0
16 – 30 min	2.0	6.0	0.0	4.0
31 min – 1 hour	26.0	4.0	30.0	10.0
1 – 1½ hours	42.0	18.0	20.0	24.0
1½ – 2 hours	14.0	12.0	22.0	30.0
2 – 3 hours	16.0	4.0	10.0	16.0
Over 3 hours	0.0	50.0	10.0	6.0
Don’t know	0.0	6.0	4.0	8.0

Source: Question 10 NEMS Survey, July 2012

Frequency of Shopping

Respondents were asked how often they shop in the centres, as shown in Table 7.9. In Margate the greatest frequency of visit is once a week and every day (both 32.0%) while in Broadstairs the greatest frequency is less than once a month (46.0%). A higher proportion visit 2-3 times a week in Ramsgate (32.0%) and Westwood Cross (24.0%). Margate had the greatest proportion of respondents visiting the centre every day (32.0%) compared to the other centres.

Table 7.9: Frequency of Visit

Frequency of Visit	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Every day	22.0	30.0	32.0	6.0
2-3 times a week	32.0	8.0	16.0	24.0
Once a week	24.0	10.0	32.0	22.0
Once a fortnight	0.0	2.0	4.0	22.0
Once a month	14.0	4.0	4.0	4.0
Less than once a month	8.0	46.0	10.0	16.0
Never	0.0	0.0	2.0	6.0

Source: Question 11 NEMS Survey, July 2012

Rating of Centres

Visitors were asked to rate each centre on a range of different factors, and the average score for each centre is shown in Table 7.10. Scores of under -0.5 suggest an overall rating of "poor" to "very poor" (shown in red). Scores of 0.5 to 2 suggest an overall rating of "good" or "very good". Scores of between -0.5 to 0.5 suggest a neutral rating with equal proportions rating the centre as "good" or "poor". The centres were rated as follows:

- Ramsgate - eight factors rated as "good", no factors rated as "poor";
- Broadstairs – 16 factors rated as "good", three factors rated as "poor";
- Margate - four factors rated as "good", five factors rated as "poor";
- Westwood Cross - 17 factors rated as "good", no factors rated as "poor".

Five factors overall were rated as "poor" in Margate – range of shops and services available, quality of shops and services available, daytime entertainment/leisure facilities, liveliness/street life/character and the market. Bus services and bus facilities (shelters) were two factors that were rated as "good" in all four centres, while six of the factors – liveliness/street life/ character, quality/number of places to eat/drink, general shopping environment, layout of centre, size/quality of supermarkets – were rated good in three centres. Overall Margate has the lowest average score (-0.05), while Broadstairs and Westwood Cross have the highest scores.

Table 7.10: How Visitors Rate Aspects of Centres

Factor	Ramsgate	Broadstairs	Margate	Westwood Cross
Car parking availability	0.54	-0.58	0.11	0.95
Car parking charges	0.03	-1.09	0.58	1.23
Traffic congestion	0.36	-1.00	0.19	-0.33
Bus services	1.06	1.46	0.95	1.22
Bus facilities (shelters)	1.06	1.08	0.79	0.89
Personal safety	0.48	1.63	0.88	1.39
Range of shops and services available	0.41	0.62	-0.84	1.26
Quality of shops and services available	0.49	0.62	-0.52	1.30
Daytime entertainment/ leisure facilities	0.33	1.13	-0.57	0.83
Evening entertainment/ leisure facilities	0.36	1.17	0.42	1.00
Town Centre events	0.38	1.08	-0.41	0.96
Liveliness/street life/ character	0.50	1.09	-0.59	0.98
Quality/number of places to eat/drink	1.00	1.20	0.12	1.26
General shopping environment	0.73	1.00	-0.36	1.33
Planting/landscaping	0.49	0.76	-0.14	0.98
Layout of centre	0.78	0.84	-0.22	1.04
Size/quality of supermarkets	0.69	0.73	-0.33	1.00
Public toilets	0.41	1.21	-0.44	0.84
The market	0.14	0.61	-0.74	-0.33
Average Score	0.53	0.71	0.05	0.93

Source: Question 12, NEMS Survey, July 2012

Based on a scoring system of -2 for very poor, -1 poor, 0 neutral, 1 good and 2 for very good

Green *= Good to Very Good (0.5 to 2)*

Black *= Neutral (-0.5 to 0.5)*

Red *= Poor to Very Poor (-0.5 to -2)*

Respondents were also asked what improvement they would like to see in the centres. Overall the main responses were as follows:

Table 7.11: Suggested Improvements

Improvement	% of Visitors	Main Centres Where Mentioned
Nothing in particular	27.0%	Ramsgate (16.0%), Broadstairs (36.0%), Margate (6.0%), Westwood Cross (50.0%)
Improve quality of shops and services	18.5%	Ramsgate (22.0%) and Margate (40.0%)
Improve the appearance of the town centre	16.5%	Ramsgate (18.0%) and Margate (38.0%)
Increase the range of local/speciality retailers	16.0%	Ramsgate (6.0%), Broadstairs (16.0%), Margate (30.0%), Westwood Cross (12.0%)
Improve car parking availability	11.0%	Broadstairs (28.0%) and Westwood Cross (12.0%)
Make it cleaner/less litter/dog fouling	8.0%	Ramsgate (12.0%) and Margate (20.0%)
Provide better entertainment/leisure	7.5%	Ramsgate (12.0%) and Margate (16.0%)
Make the centre safer (more CCTV, policing, better lighting etc)	5.0%	Ramsgate (16.0%)

Source: Question 13 NEMS Survey, July 2012

Evening Activity

Visitors were asked whether they ever visited the centres in the evenings. Overall only 27.5% of respondents also visited the centres in the evening. Broadstairs town centre had the highest proportion of respondents who stated that they visit the centre in the evening (42.0%). The lowest proportion was in Ramsgate and Margate, with only 20.0% visiting the centres in the evening.

The main reasons most respondents visited the four centres in the evening was to go to pubs/bars (47.3%) and restaurants (78.2%). 20.0% of those visiting Ramsgate also went to social clubs. In Margate, a significant proportion of those visiting the centre in the evening do so to use services, takeaway food and to walk about/look around (each 20.0%). In Westwood Cross, a significant proportion of those visiting the centre in the evening do so to go to the Cinema (78.6%).

Table 7.12: Reasons for Visiting the Centres in the Evening

Evening Visit	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Cinema	0.0	0.0	10.0	78.6
Nightclubs	10.0	0.0	10.0	0.0
Pubs/bars	60.0	66.7	60.0	0.0
Restaurants	60.0	90.5	60.0	85.7
Services (e.g. cash points)	0.0	9.5	20.0	7.1
Sports Facilities	0.0	0.0	10.0	0.0
Takeaway food	0.0	4.8	20.0	0.0
Theatre	0.0	0.0	0.0	0.0
Walk about/look around	0.0	9.5	20.0	14.3
Other	0.0	0.0	0.0	0.0
Bingo hall	0.0	0.0	10.0	0.0
Casino	0.0	0.0	0.0	7.1
Social club	20.0	0.0	0.0	0.0

Source: Question 15 NEMS Survey, July 2012

N.B – May not sum to 100% as more than one response may be given

Visitors were asked what they liked and disliked about the leisure, pub and bars and restaurant facilities in the centre, as shown in Tables 7.13 and 7.14.

A relatively high proportion of respondents overall (18.0%) considered that there good choice of restaurant was what they liked about the leisure facilities in all of the centres. After “good choice of restaurants”, being close to home had the highest proportion of responses in all four centres. In Ramsgate a significant proportion stated that there was a good quality of pubs/bars (20.0%) and in Margate a significant proportion stated there was ‘nothing in particular’ they liked about the leisure facilities (24.0%).

Table 7.13: Likes about Leisure/Pubs and Bars/Restaurant Facilities

Likes	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing in particular	8.0	10.0	24.0	18.0
Close to home/easy to get to	10.0	10.0	22.0	20.0
Good choice of pubs/bars	12.0	2.0	8.0	6.0
Good quality of pubs/bars	20.0	6.0	4.0	6.0
Good choice of restaurants	24.0	22.0	8.0	18.0
Good quality of restaurants	6.0	8.0	4.0	8.0
Good health/fitness facilities	4.0	0.0	2.0	0.0
Other	0.0	0.0	0.0	0.0
Friendly environment	0.0	14.0	4.0	0.0
Don’t know	0.0	4.0	0.0	14.0
Don’t visit these places in study area	58.0	42.0	40.0	32.0

Source: Question 16 NEMS Survey, July 2012

N.B – May not sum to 100% as more than one response may be given

The majority of respondents suggested that they dislike nothing in particular about the leisure/restaurants/pubs and bars in all the centres. In Ramsgate 14.3% of respondents stated that the facilities being too expensive were a reason for why they dislike visiting the leisure facilities. While in Margate, 23.3% of respondents stated they felt the facilities were unsafe/poor security/dangerous.

Table 7.14: Dislikes about Leisure/Pubs and Bars/Restaurant Facilities

Dislikes	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing in particular	81.0	65.5	60.0	64.7
Car parking charges	0.0	0.0	0.0	0.0
Lack of parking charges	0.0	0.0	0.0	0.0
Lack of public transport	4.8	0.0	0.0	0.0
Poor choice of facilities	0.0	3.4	10.0	2.9
Too expensive	14.3	3.4	3.3	0.0
Unsafe/poor security/dangerous	9.5	6.9	23.3	0.0
Other	0.0	0.0	0.0	0.0
Noisy	0.0	3.4	0.0	0.0
Too many chain venues	0.0	0.0	0.0	8.8
Don’t Know	0.0	20.7	6.7	23.5

Source: Question 17 NEMS Survey, July 2012

N.B – May not sum to 100% as more than one response may be given

Art and Culture Activities

Visitors to the centres were asked what they liked about visiting the art and cultural facilities in each of the centres. In Ramsgate, Westwood Cross and Margate a significant number of respondents liked how close to home/easy to get to the facilities are (24.0% and 36.0% respectively). A high proportion of respondents in Broadstairs do not visit art/cultural facilities, reflecting the limited provision of such facilities in the centre.

Table 7.15: Like about visiting the arts/ cultural facilities

Likes	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing in particular	16.0	20.0	20.0	6.0
Close to home/easy to get to	24.0	0.0	14.0	36.0
Good choice of theatres	4.0	0.0	10.0	2.0
Good quality of theatres	6.0	0.0	4.0	2.0
Good choice of art galleries	2.0	0.0	10.0	2.0
Good quality of art galleries	0.0	0.0	12.0	4.0
Good choice of museums	0.0	0.0	2.0	6.0
Good quality of museum	0.0	0.0	2.0	0.0
Other	0.0	0.0	0.0	0.0
Don't know	0.0	10.0	0.0	14.0
Don't visit these places in each of the centres	56.0	70.0	48.0	38.0

Source: Question 18 NEMS Survey July 2012

N.B – May not sum to 100% as more than one response may be given

Table 7.16: Dislikes about visiting the arts/cultural facilities

Dislikes	% Respondents in Each Centre			
	Ramsgate	Broadstairs	Margate	Westwood Cross
Nothing in particular	86.4	80.0	96.2	80.6
Car parking charges	0.0	0.0	0.0	0.0
Lack of public transport	0.0	0.0	0.0	0.0
Poor choice of facilities	0.0	0.0	0.0	0.0
Too expensive	4.5	0.0	0.0	0.0
Unsafe/poor security/dangerous	0.0	0.0	3.8	0.0
Other	0.0	0.0	0.0	0.0
Don't Know	9.1	20.0	0.0	19.4

Source: Question 19 NEMS Survey July 2012

The majority of respondents disliked nothing in particular about the arts/cultural facilities in each of the centres. In Ramsgate, a small number of respondents believe that the facilities are too expensive (4.5%), while in Margate, 3.8% of respondents feel the facilities are unsafe/poor security/dangerous.

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