

# **Thanet Retail and Leisure Assessment 2018 Update**

Thanet District Council

5 January 2018

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## 1.0 Introduction

### Background

- 1.1 Lichfields was commissioned by the Thanet District to prepare the Thanet Town Centre, Retail, Leisure, Tourism and Culture Assessment published in December 2012 (TCRLTC 2012). The objectives of TCRLTC 2012 were to:
- 1 assess changes in circumstances and shopping patterns;
  - 2 assess the future need and (residual) capacity for retail floorspace distributed by town centre for the period up to 2031;
  - 3 assess the existing supply and demand for retail and other town centre uses and the role played by each of the centres;
  - 4 review the proposed land allocations in the Core Strategy Preferred Options document and comment on their appropriateness in terms of accommodating potential growth and meeting the identified need;
  - 5 audit existing commercial leisure provision and assess potential future requirements;
  - 6 audit existing tourism and cultural uses and facilities within the District and assess potential future requirements; and
  - 7 provide advice on policies to be included in development plan documents to address future needs, and provide recommendations on how each town centre can develop its role.
- 1.2 TCRLTC 2012 was partially updated in 2016 as set out in the Thanet Retail and Leisure Assessment 2016 Update (TCRLA 2016).
- 1.3 This report provides a further update of the TCRLTC 2012 and TCRLA 2016, and should be read alongside these two previous studies. This report updates the District wide retail capacity projections and need assessment, including:
- 1 update population projections scenarios using the GL Hearn's Updated Assessment of Objectively Assessed Housing Need 2016;
  - 2 Experian's local expenditure data (the latest 2016 data, which was issued in December 2017, will be obtained) for the six study area zones;
  - 3 Experian's latest (December 2017) expenditure growth projections and home shopping projections;
  - 4 revised retail sales floorspace for main stream food stores in the District based on the latest StorePoint database;
  - 5 benchmark turnover estimates for existing and proposed food store floorspace based on the latest Global Data information 2017;
  - 6 Experian's latest growth forecast for special forms of trading and growth in turnover efficiencies;
  - 7 an update on pipeline retail developments;
  - 8 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met.

## 2.0 **Retail and Food/Beverage Capacity Assessment**

2.1 This section objectively assesses the quantitative scope for new retail and food/beverage floorspace in Thanet in the period from 2016 to 2031. The assessment follows the same approach adopted in the TCRLTC 2012 and TCRLA 2016. A summary of the methodology and key data inputs is contained in Appendix 1.

### **Study Area**

2.2 The quantitative analysis is based on a defined study area and sub-zones that covers the catchment areas of the main shopping destinations in Thanet. The study area is shown in Appendix 1.

### **Population and Expenditure**

2.3 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. The 2011 base year population for each zone has been obtained and projected to 2031 using the latest objectively assessed housing needs for Thanet. Population within the study area is expected to increase between 2011 and 2031 by 20.5% (27,583 people).

2.4 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods and food/beverage spending per capita are shown in Table 3 in Appendix 3 and Appendix 4 respectively.

2.5 Based on the latest population projections, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12.7% from £300.97 million in 2016 to £338.29 million in 2031, as shown in Table 3 (Appendix 2).

2.6 Comparison goods spending is forecast to increase by 67.9% between 2016 and 2031, increasing from £409.67 million in 2016 to £687.64 million in 2031, as shown in Table 3 (Appendix 3).

2.7 Food and beverage spending is forecast to increase by 33.2% between 2016 and 2031, increasing from £145.87 million in 2016 to £194.29 million in 2031, as shown in Table 3 (Appendix 4).

2.8 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and beverage does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

2.9 These figures relate to real growth and exclude inflation.

### **Existing Spending Patterns 2016**

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

### **Convenience Shopping**

2.11 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

- 2.12 The level of convenience goods expenditure attracted to shops/stores in Thanet in 2016 is estimated to be £336.27 million as shown in Table 5, Appendix 2. The total benchmark turnover of the existing convenience sales floorspace within Thanet District is £368.97 million at 2016 (Table 9, Appendix 2). These figures suggest that collectively convenience retail facilities in the District are trading 8.8% below the average benchmark turnover. Given the high level of convenience expenditure retained in the District, this suggests that there is currently more than a sufficient supply of convenience goods floorspace.

### **Comparison Shopping**

- 2.13 The estimated comparison goods expenditure currently attracted by shopping facilities within Thanet District is £447.29 million in 2016, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area. Based on the base year estimate of comparison goods expenditure attracted to facilities within Thanet, the average sales density for existing comparison sales floorspace (95,818 sq.m net) is around £4,700 per sq.m net in 2016.

### **Food and Beverage**

- 2.14 The estimated food and beverage expenditure currently attracted by facilities within Thanet District is £147.33 million in 2016, as shown in Table 5, Appendix 4. Based on the base year estimate of food and beverage expenditure attracted to facilities within Thanet, the average sales density for existing food and beverage floorspace (21,441 sq.m net) is around £6,900 per sq.m gross in 2016.

### **Capacity for Convenience Goods Floorspace**

- 2.15 The future levels of available convenience goods expenditure in 2021, 2026 and 2031 are shown at Tables 6 to 8 in Appendix 2. The total level of convenience goods expenditure available for shops in the District between 2016 and 2031 is summarised in Table 10 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £336.77 million in 2016 to £379.52 million in 2031.
- 2.16 Table 10 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is a deficit of -£32.2 million convenience goods expenditure in 2016. This is primarily due to the opening of the larger Sainsbury's store at Westwood Cross. By 2026, this deficit decreases to -£5.54 million. Future expenditure growth generates an expenditure surplus of £10.54 million by 2031.
- 2.17 The deficit/surplus expenditure projections have been converted into floorspace estimates in Table 11. Expenditure is converted into floorspace estimates using an assumed average sales density figure of £12,000 per sq.m, based on the average turnover of the main food supermarket operators. The floorspace requirements are summarised in Table 2.1 below.
- 2.18 The TCRLCT 2012 retail capacity assessment suggested a higher figure of 3,941 sq.m gross would be required within Thanet by 2031. The updated floorspace projection is lower despite the SHMA's higher population growth projections. These higher population projections have been offset by lower expenditure growth forecasts and an increase in existing convenience sales floorspace in the District.

Table 2.1 Convenience Goods Floorspace Projections (SQ.M Gross)

	By 2021	By 2026	By 2031
Margate/Cliftonville	93	396	700
Westwood Cross	-2,727	-2,096	-1,461
Broadstairs/St Peters	884	1,266	1,650
Ramsgate	-163	309	783
Birchington/Westgate	-541	-443	-345
Other Thanet	-110	-91	-72
<b>District Total</b>	<b>-2,565</b>	<b>-659</b>	<b>1,255</b>

Source: Table 11, Appendix 2

- 2.19 Since the 2012 study was completed, Sainsbury's opened an enlarged food store at Westwood Cross, replacing the existing Sainsbury's store (ref. F/TH/11/0200). The implementation of this larger store has been taken into account in the above capacity assessment and already deducted from the residual floorspace needs, which has resulted in a deficit of convenience goods expenditure within Westwood Cross over the study period, and this may result in some stores trading at below company average turnovers. In addition, a new Farmfoods store has opened at Richborough Close, Margate. Both the larger Sainsbury's store and the Farmfoods stores have been included in the estimated benchmark turnovers of existing facilities (Table 9, Appendix 2).
- 2.20 In terms of retail commitments, permission was granted for a Tesco superstore at the Arlington site in Margate. This has not been implemented and we understand that Tesco has pulled out of this development. Permission is expected to lapse in 2018. If this development was to re-emerge then it would significantly exceed the District wide convenience goods floorspace projection up to 2031 i.e. 2,508 sq.m net compared with the projection of only 878 sq.m net.
- 2.21 The unimplemented planning permission for a new local centre at Eurokent (Westwood) comprising up to 2,000 sq.m gross retail (Class A1, A2 and A3), is likely to include an element of convenience goods retailing and could accommodate the long term projection.
- ### Capacity for Comparison Goods Floorspace
- 2.22 The retail capacity projections in this report assume centres within Thanet District can maintain their market share of comparison expenditure in the future. Available comparison goods expenditure has been projected forward to 2021, 2026 and 2031 based on 2016 penetration rates in Tables 6, 7 and 8 in Appendix 3, and summarised in Table 10. Available comparison expenditure to facilities within the District is expected to increase from £447.29 million in 2016 to £750.78 million in 2031.
- 2.23 Table 10 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, as recommended by Experian. This growth will help to maintain the health and viability of town centres.
- 2.24 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 4, adopting average sales densities in 2016 of £6,000 per sq.m, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 18,426 sq.m net of comparison sales floorspace (24,567 sq.m gross).
- 2.25 The floorspace projections are summarised in Table 2.2 below.



Table 2.2 Comparison Goods Floorspace Projections (SQ.M Gross)

	By 2021	By 2026	By 2031
Margate/Cliftonville	181	977	1,853
Westwood Cross	1,643	8,851	16,787
Broadstairs/St Peters	210	1,130	2,143
Ramsgate	276	1,488	2,822
Birchington/Westgate	87	468	889
Other Thanet	7	39	73
<b>District Total</b>	<b>2,404</b>	<b>12,952</b>	<b>24,567</b>

Source: Table 11, Appendix 3

- 2.26 The TCRLCT 2012 retail capacity assessment suggested a higher figure of 34,300 sq.m gross would be required within Thanet by 2031, due to higher expenditure growth projections at that time.
- 2.27 Since the 2012 study was undertaken, comparison goods floorspace has been built, including additional non-food floorspace at the Sainsbury's store. In addition, 8,036 sq.m gross of A1 retail units proposed within the Sainsbury's (Westwood) application remain unimplemented. If implemented and occupied by comparison goods retailing, these units could absorb nearly one third of the District wide projection up to 2031.
- 2.28 Along with the reoccupation of vacant shop units, this commitment is expected to absorb growth up to and beyond 2026 (12,952 sq.m gross), and could accommodate over 70% of the District wide projection up to 2031.
- 2.29 Other unimplemented comparison goods commitments include a 325 sq.m mezzanine floor at Tapi carpets, Westwood Retail Park. The unimplemented Tesco at the Arlington site, Margate also included 1,544 sq.m net comparison goods floorspace, together with comparison unit shops with a net sales area of 399 sq.m. If implemented, this would absorb most if not all of the identified floorspace requirements for Margate. The proposed local centre at Eurokent (Westwood) could also include an element of comparison goods floorspace.

## Capacity for Food and Beverage Floorspace

- 2.30 The floorspace capacity projections in this report assume centres within Thanet District can maintain their market share of food and beverage expenditure in the future. Available comparison goods expenditure has been projected forward to 2021, 2026 and 2031 based on 2016 penetration rates in Tables 6, 7 and 8 in Appendix 4, and summarised in Table 10. Available food and beverage expenditure to facilities within the District is expected to increase from £147.33 million in 2016 to £196.23 million in 2031.
- 2.31 Table 10 assumes that the turnover of food and beverage floorspace will increase in real terms in the future. A growth rate of 1% per annum is adopted. Surplus food and beverage expenditure has been converted into food and beverage floorspace projections at Table 12 in Appendix 4, adopting average sales densities in 2016 of £5,000 per sq.m, which is projected to grow by 1% in the future due to improved turnover efficiency. The surplus expenditure at 2031 could support 4,338 sq.m gross food and beverage floorspace.
- 2.32 The floorspace projections are summarised in Table 2.3 below.

Table 2.3 Food and Beverage Floorspace Projections (SQ.M Gross)

	By 2021	By 2026	By 2031
Margate/Cliftonville	101	295	496
Westwood Cross	186	541	910
Broadstairs/St Peters	237	691	1,161
Ramsgate	190	554	932
Birchington/Westgate	79	231	389
Other Thanet	92	267	449
<b>District Total</b>	<b>886</b>	<b>2,579</b>	<b>4,338</b>

Source: Table 11, Appendix 4

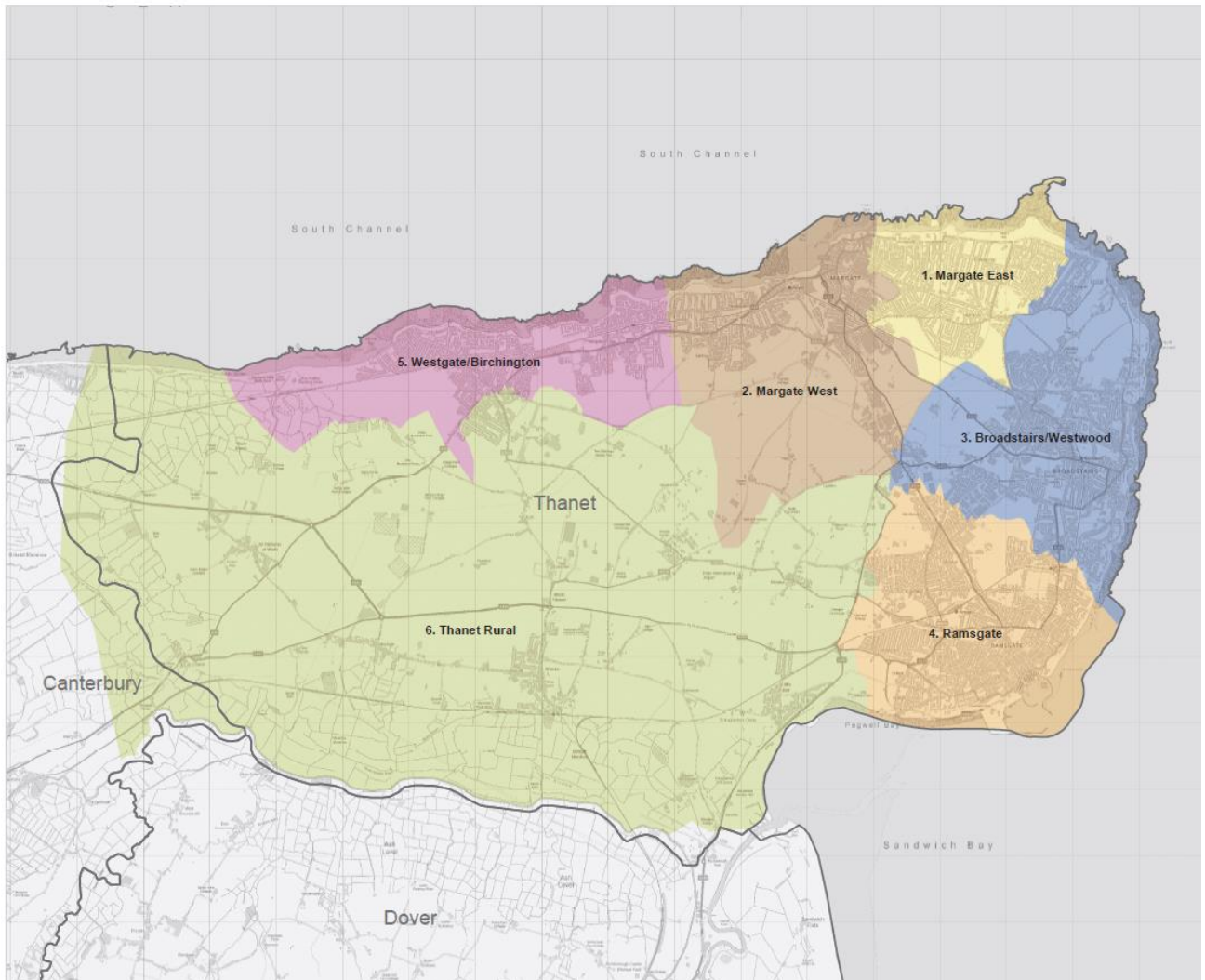
- 2.33 The TCRLCT 2012 capacity assessment suggested a higher figure of 6,043 sq.m gross would be required within Thanet by 2031, due to higher expenditure growth projections at that time.
- 2.34 The reoccupation of vacant units should help to accommodate these floorspace projections. Two commitments have recently been implemented at Westbrook Promenade in Margate (786 sq.m gross of A3 and A4) and at the Royal Victoria Pavillion in Ramsgate for change of use to A4 (1,803 sq.m gross). There is an unimplemented commitment at the former Franks Nightclub in Cliftonville, which has permission for change of use to A3 (465 sq.m gross).
- 2.35 Together these commitments since 2016 (3,054 sq.m gross) could absorb food and beverage growth up to and beyond 2026. The proposed local centre at Eurokent (Westwood) could also include an element of food and beverage floorspace.

## Implications for the Development Plan Strategy

- 2.36 The revised retail capacity projections suggest there is scope for up to around 30,200 sq.m gross Class A1 to A5 retail floorspace in Thanet District as a whole by 2031.
- 2.37 As previously indicated in the update TCRLA 2016, 10,100 sq.m gross of this capacity projection could be accommodated in vacant floorspace. Most of the remaining 21,100 sq.m gross could be accommodated in commitments completed or approved since 2016 (13,415 sq.m gross excluding the Tesco commitment).
- 2.38 There is no requirement for additional convenience goods retail floorspace for the foreseeable future, up to and beyond 2026. Retail commitments, if implemented, would significantly exceed the capacity for convenience goods floorspace in the District as a whole up to 2031.
- 2.39 If the comparison goods and food/beverage retail commitments are implemented, together with the recently completed floorspace, would absorb the majority of the remaining floorspace capacity in the District up to 2031.

# **Appendix 1: Study Area and Methodology**

## Study Area Zones



## **Retail Capacity Assessment – Methodology and Data**

### **Price Base**

All monetary values expressed in this study are at 2016 prices, consistent with Experian's base year expenditure figures for 2016 (Retail Planner Briefing Note 15, December 2017) which is the most up to date information available.

### **Retail Expenditure**

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, convenience goods and food/beverage for each of the study area zones for the year 2016 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2016 to 2019 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 0% for 2016 to 2017, -0.6% for 2017 to 2018 and -0.2% to 2019; for comparison goods: +2.3% for 2016-2017, +0.9% for 2017-2018 and +2.1% for 2019; for food and beverage: +0.3% for 2016-2017, -0.1% for 2017-2018 and +0.8% for 2019..

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2019; 3.2% per annum growth for comparison goods after 2019; and food and beverage 1.1% after 2019. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2016 was:

- 9.6% of convenience goods expenditure; and
- 18.0% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail

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businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2016 were:

- 2.9% of convenience goods expenditure; and
- 13.5% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.1% and 17.8% by 2031 respectively. These figures have been adopted in this assessment.

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.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after 2022.

The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

### **Market Shares/Penetration Rates**

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the July 2012 household survey.

The total turnover of shops and food/beverage outlets within Thanet is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data 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**

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

Changes in convenience goods sales areas between 2012 and 2016 have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and the Council's land use surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

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Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Thanet and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £6,000 per sq.m net for convenience shops/stores in the study area has been adopted. The total benchmark turnover of identified convenience sales floorspace within Thanet is £368.97 million (Tables 9 Appendix 2).

Global Data provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges from £5,000 to £8,000 per sq.m net.





## **Appendix 2: Convenience Goods Capacity**

**Table 1: Population Projections**

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,826	22,905	24,020	25,185	26,305
Zone 2: Margate West	21,553	22,618	23,719	24,870	25,976
Zone 3: Broadstairs/Westwood	24,987	26,222	27,498	28,832	30,115
Zone 4: Ramsgate	40,389	42,385	44,448	46,604	48,678
Zone 5: Westgate/Birchington	14,966	15,706	16,470	17,269	18,037
Zone 6: Thanet Rural	10,681	11,209	11,754	12,325	12,873
<b>Total</b>	<b>134,402</b>	<b>141,044</b>	<b>147,910</b>	<b>155,083</b>	<b>161,985</b>

Sources: Thanet Strategic Housing Market Assessment (2016) - adjusted for increased OAN - 15,660 to 17,140 homes

**Table 2: Convenience Goods Expenditure Per Capita**

Zone	2016	2021	2026	2031
Zone 1: Margate East	£1,998	£1,966	£1,961	£1,961
Zone 2: Margate West	£2,025	£1,992	£1,987	£1,987
Zone 3: Broadstairs/Westwood	£2,291	£2,253	£2,248	£2,248
Zone 4: Ramsgate	£2,038	£2,005	£2,000	£2,000
Zone 5: Westgate/Birchington	£2,223	£2,187	£2,181	£2,181
Zone 6: Thanet Rural	£2,433	£2,394	£2,388	£2,388

Sources:

Experian local estimates for 2016 convenience goods expenditure per capita (2016 prices)

Growth Rates: 2016-17 = 0%; 2017-18 = -0.6%; 2018-19 = -0.2% and 0.1% p.a. beyond 2019

Excludes Special Forms of Trading

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

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£45.77	£47.22	£49.39	£51.58	3.2%	7.9%	12.7%
Zone 2: Margate West	£45.79	£47.24	£49.42	£51.60	3.2%	7.9%	12.7%
Zone 3: Broadstairs/Westwood	£60.06	£61.96	£64.82	£67.69	3.2%	7.9%	12.7%
Zone 4: Ramsgate	£86.39	£89.12	£93.23	£97.35	3.2%	7.9%	12.7%
Zone 5: Westgate/Birchington	£34.91	£36.01	£37.67	£39.34	3.2%	7.9%	12.7%
Zone 6: Thanet Rural	£27.27	£28.14	£29.43	£30.74	3.2%	7.9%	12.7%
<b>Total</b>	<b>£300.19</b>	<b>£309.69</b>	<b>£323.96</b>	<b>£338.29</b>	<b>3.2%</b>	<b>7.9%</b>	<b>12.7%</b>

Sources: Table 1 and Table 2

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

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Morrisons, College Walk, Margate	12.2%	21.0%	0.6%	0.0%	4.6%	1.9%	10.0%
Aldi, Zion Place, Margate	7.8%	3.7%	0.4%	0.0%	5.2%	0.5%	5.0%
Other Margate	3.3%	11.7%	0.5%	0.0%	3.2%	0.7%	5.0%
Tesco Metro, Northdown Road, Cliftonville	22.6%	1.9%	1.4%	0.2%	0.8%	0.0%	5.0%
Cliftonville	3.4%	0.3%	0.4%	0.0%	0.0%	0.7%	5.0%
Other Zones 1/2	0.3%	2.6%	0.0%	0.1%	0.0%	0.7%	5.0%
<b>Margate/Cliftonville Sub-Total</b>	<b>49.6%</b>	<b>41.2%</b>	<b>3.3%</b>	<b>0.3%</b>	<b>13.8%</b>	<b>4.5%</b>	
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%
<b>Westwood Cross Sub-Total</b>	<b>31.0%</b>	<b>32.2%</b>	<b>38.9%</b>	<b>23.0%</b>	<b>33.2%</b>	<b>20.3%</b>	
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%
<b>Broadstairs Sub-Total</b>	<b>16.4%</b>	<b>19.7%</b>	<b>50.7%</b>	<b>9.2%</b>	<b>9.6%</b>	<b>13.2%</b>	
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%
<b>Ramsgate Sub-Total</b>	<b>3.0%</b>	<b>2.6%</b>	<b>6.6%</b>	<b>67.2%</b>	<b>9.9%</b>	<b>21.4%</b>	
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%
<b>Birchington/Westgate Sub-Total</b>	<b>0.0%</b>	<b>3.5%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>30.9%</b>	<b>13.9%</b>	
Other Thanet	0.0%	0.0%	0.0%	0.0%	0.3%	11.5%	5.0%
<b>District Total</b>	<b>100.0%</b>	<b>99.2%</b>	<b>99.8%</b>	<b>99.7%</b>	<b>97.7%</b>	<b>84.8%</b>	
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
<b>Market Share Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey, July 2012 with Lichfield adjustments

Table 5: Convenience Expenditure 2016 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2016</b>	<b>£45.77</b>	<b>£45.79</b>	<b>£60.06</b>	<b>£86.39</b>	<b>£34.91</b>	<b>£27.27</b>		<b>£300.19</b>
Morrisons, College Walk, Margate	£5.58	£9.62	£0.36	£0.00	£1.61	£0.52	£1.96	£19.65
Aldi, Zion Place, Margate	£3.57	£1.69	£0.24	£0.00	£1.82	£0.14	£0.39	£7.85
Other Margate	£1.51	£5.36	£0.30	£0.00	£1.12	£0.19	£0.45	£8.92
Tesco Metro, Northdown Road, Cliftonville	£10.34	£0.87	£0.84	£0.17	£0.28	£0.00	£0.66	£13.17
Cliftonville	£1.56	£0.14	£0.24	£0.00	£0.00	£0.19	£0.11	£2.24
Other Zones 1/2	£0.14	£1.19	£0.00	£0.09	£0.00	£0.19	£0.08	£1.69
<b>Margate/Cliftonville Sub-Total</b>	<b>£22.70</b>	<b>£18.87</b>	<b>£1.98</b>	<b>£0.26</b>	<b>£4.82</b>	<b>£1.23</b>	<b>£3.66</b>	<b>£53.51</b>
Tesco Extra, Margate Road	£10.21	£8.88	£12.97	£11.83	£5.83	£2.89	£13.15	£65.77
Sainsbury's, Margate Road	£3.48	£5.17	£9.97	£6.22	£5.06	£2.10	£8.00	£40.01
Marks & Spencer, Westwood Cross	£0.37	£0.69	£0.42	£1.38	£0.56	£0.55	£0.99	£4.95
Other Westwood Cross	£0.14	£0.00	£0.00	£0.43	£0.14	£0.00	£0.18	£0.89
<b>Westwood Cross Sub-Total</b>	<b>£14.19</b>	<b>£14.74</b>	<b>£23.36</b>	<b>£19.87</b>	<b>£11.59</b>	<b>£5.54</b>	<b>£22.32</b>	<b>£111.62</b>
Asda, Westwood Road, Broadstairs	£6.87	£8.15	£15.02	£7.43	£2.76	£1.85	£4.67	£46.75
Other Broadstairs	£0.50	£0.73	£12.61	£0.52	£0.59	£1.36	£0.86	£17.18
Other Zone 3	£0.14	£0.14	£2.82	£0.00	£0.00	£0.38	£0.18	£3.66
<b>Broadstairs Sub-Total</b>	<b>£7.51</b>	<b>£9.02</b>	<b>£30.45</b>	<b>£7.95</b>	<b>£3.35</b>	<b>£3.60</b>	<b>£5.72</b>	<b>£67.60</b>
Tesco, Manston Road, Ramsgate	£0.41	£1.01	£0.24	£19.70	£2.34	£4.04	£4.89	£32.62
Waitrose, Queen Street, Ramsgate	£0.14	£0.09	£0.78	£8.21	£0.45	£0.74	£1.84	£12.24
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.72	£7.52	£0.00	£0.52	£0.97	£9.73
Asda, Chatham Street, Ramsgate	£0.14	£0.00	£0.48	£6.57	£0.00	£0.00	£0.80	£7.98
Other Ramsgate	£0.69	£0.09	£1.74	£16.07	£0.66	£0.55	£1.04	£20.84
<b>Ramsgate Sub-Total</b>	<b>£1.37</b>	<b>£1.19</b>	<b>£3.96</b>	<b>£58.05</b>	<b>£3.46</b>	<b>£5.84</b>	<b>£9.54</b>	<b>£83.41</b>
Birchington	£0.00	£0.23	£0.00	£0.00	£7.05	£3.68	£0.58	£11.54
Westgate	£0.00	£1.37	£0.18	£0.00	£3.74	£0.11	£0.28	£5.68
<b>Birchington/Westgate Sub-Total</b>	<b>£0.00</b>	<b>£1.60</b>	<b>£0.18</b>	<b>£0.00</b>	<b>£10.79</b>	<b>£3.79</b>	<b>£0.86</b>	<b>£17.22</b>
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.10	£3.14	£0.17	£3.41
<b>District Total</b>	<b>£45.77</b>	<b>£45.42</b>	<b>£59.94</b>	<b>£86.13</b>	<b>£34.10</b>	<b>£23.13</b>	<b>£42.27</b>	<b>£336.77</b>
Canterbury	£0.00	£0.23	£0.12	£0.17	£0.56	£3.27	n/a	£4.35
Dover	£0.00	£0.14	£0.00	£0.00	£0.00	£0.49	n/a	£0.63
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.24	£0.11	n/a	£0.35
Sandwich	£0.00	£0.00	£0.00	£0.09	£0.00	£0.27	n/a	£0.36
<b>Total</b>	<b>£45.77</b>	<b>£45.79</b>	<b>£60.06</b>	<b>£86.39</b>	<b>£34.91</b>	<b>£27.27</b>		<b>£342.47</b>

Table 6: Convenience Expenditure 2021 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2021</b>	<b>£47.22</b>	<b>£47.24</b>	<b>£61.96</b>	<b>£89.12</b>	<b>£36.01</b>	<b>£28.14</b>		<b>£309.69</b>
Morrisons, College Walk, Margate	£5.76	£9.92	£0.37	£0.00	£1.66	£0.53	£2.03	£20.27
Aldi, Zion Place, Margate	£3.68	£1.75	£0.25	£0.00	£1.87	£0.14	£0.40	£8.10
Other Margate	£1.56	£5.53	£0.31	£0.00	£1.15	£0.20	£0.46	£9.20
Tesco Metro, Northdown Road, Cliftonville	£10.67	£0.90	£0.87	£0.18	£0.29	£0.00	£0.68	£13.58
Cliftonville	£1.61	£0.14	£0.25	£0.00	£0.00	£0.20	£0.12	£2.31
Other Zones 1/2	£0.14	£1.23	£0.00	£0.09	£0.00	£0.20	£0.09	£1.74
<b>Margate/Cliftonville Sub-Total</b>	<b>£23.42</b>	<b>£19.46</b>	<b>£2.04</b>	<b>£0.27</b>	<b>£4.97</b>	<b>£1.27</b>	<b>£3.77</b>	<b>£55.21</b>
Tesco Extra, Margate Road	£10.53	£9.16	£13.38	£12.21	£6.01	£2.98	£13.57	£67.86
Sainsbury's, Margate Road	£3.59	£5.34	£10.29	£6.42	£5.22	£2.17	£8.25	£41.27
Marks & Spencer, Westwood Cross	£0.38	£0.71	£0.43	£1.43	£0.58	£0.56	£1.02	£5.11
Other Westwood Cross	£0.14	£0.00	£0.00	£0.45	£0.14	£0.00	£0.18	£0.91
<b>Westwood Cross Sub-Total</b>	<b>£14.64</b>	<b>£15.21</b>	<b>£24.10</b>	<b>£20.50</b>	<b>£11.96</b>	<b>£5.71</b>	<b>£23.03</b>	<b>£115.15</b>
Asda, Westwood Road, Broadstairs	£7.08	£8.41	£15.49	£7.66	£2.84	£1.91	£4.82	£48.23
Other Broadstairs	£0.52	£0.76	£13.01	£0.53	£0.61	£1.41	£0.89	£17.73
Other Zone 3	£0.14	£0.14	£2.91	£0.00	£0.00	£0.39	£0.19	£3.78
<b>Broadstairs Sub-Total</b>	<b>£7.74</b>	<b>£9.31</b>	<b>£31.42</b>	<b>£8.20</b>	<b>£3.46</b>	<b>£3.71</b>	<b>£5.90</b>	<b>£69.73</b>
Tesco, Manston Road, Ramsgate	£0.42	£1.04	£0.25	£20.32	£2.41	£4.16	£5.05	£33.66
Waitrose, Queen Street, Ramsgate	£0.14	£0.09	£0.81	£8.47	£0.47	£0.76	£1.89	£12.63
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.74	£7.75	£0.00	£0.53	£1.00	£10.04
Asda, Chatham Street, Ramsgate	£0.14	£0.00	£0.50	£6.77	£0.00	£0.00	£0.82	£8.23
Other Ramsgate	£0.71	£0.09	£1.80	£16.58	£0.68	£0.56	£1.07	£21.50
<b>Ramsgate Sub-Total</b>	<b>£1.42</b>	<b>£1.23</b>	<b>£4.09</b>	<b>£59.89</b>	<b>£3.57</b>	<b>£6.02</b>	<b>£9.84</b>	<b>£86.05</b>
Birchington	£0.00	£0.24	£0.00	£0.00	£7.27	£3.80	£0.60	£11.90
Westgate	£0.00	£1.42	£0.19	£0.00	£3.85	£0.11	£0.29	£5.86
<b>Birchington/Westgate Sub-Total</b>	<b>£0.00</b>	<b>£1.65</b>	<b>£0.19</b>	<b>£0.00</b>	<b>£11.13</b>	<b>£3.91</b>	<b>£0.89</b>	<b>£17.77</b>
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.11	£3.24	£0.18	£3.52
<b>District Total</b>	<b>£47.22</b>	<b>£46.86</b>	<b>£61.84</b>	<b>£88.85</b>	<b>£35.18</b>	<b>£23.86</b>	<b>£43.61</b>	<b>£347.43</b>
Canterbury	£0.00	£0.24	£0.12	£0.18	£0.58	£3.38	n/a	£4.49
Dover	£0.00	£0.14	£0.00	£0.00	£0.00	£0.51	n/a	£0.65
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.25	£0.11	n/a	£0.36
Sandwich	£0.00	£0.00	£0.00	£0.09	£0.00	£0.28	n/a	£0.37
<b>Total</b>	<b>£47.22</b>	<b>£47.24</b>	<b>£61.96</b>	<b>£89.12</b>	<b>£36.01</b>	<b>£28.14</b>		<b>£353.31</b>

Table 7: Convenience Expenditure 2026 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2026</b>	<b>£49.39</b>	<b>£49.42</b>	<b>£64.82</b>	<b>£93.23</b>	<b>£37.67</b>	<b>£29.43</b>		<b>£323.96</b>
Morrisons, College Walk, Margate	£6.03	£10.38	£0.39	£0.00	£1.73	£0.56	£2.12	£21.21
Aldi, Zion Place, Margate	£3.85	£1.83	£0.26	£0.00	£1.96	£0.15	£0.42	£8.47
Other Margate	£1.63	£5.78	£0.32	£0.00	£1.21	£0.21	£0.48	£9.63
Tesco Metro, Northdown Road, Cliftonville	£11.16	£0.94	£0.91	£0.19	£0.30	£0.00	£0.71	£14.21
Cliftonville	£1.68	£0.15	£0.26	£0.00	£0.00	£0.21	£0.12	£2.41
Other Zones 1/2	£0.15	£1.28	£0.00	£0.09	£0.00	£0.21	£0.09	£1.82
<b>Margate/Cliftonville Sub-Total</b>	<b>£24.50</b>	<b>£20.36</b>	<b>£2.14</b>	<b>£0.28</b>	<b>£5.20</b>	<b>£1.32</b>	<b>£3.95</b>	<b>£57.75</b>
Tesco Extra, Margate Road	£11.02	£9.59	£14.00	£12.77	£6.29	£3.12	£14.20	£70.98
Sainsbury's, Margate Road	£3.75	£5.58	£10.76	£6.71	£5.46	£2.27	£8.63	£43.17
Marks & Spencer, Westwood Cross	£0.40	£0.74	£0.45	£1.49	£0.60	£0.59	£1.07	£5.34
Other Westwood Cross	£0.15	£0.00	£0.00	£0.47	£0.15	£0.00	£0.19	£0.96
<b>Westwood Cross Sub-Total</b>	<b>£15.31</b>	<b>£15.91</b>	<b>£25.21</b>	<b>£21.44</b>	<b>£12.51</b>	<b>£5.98</b>	<b>£24.09</b>	<b>£120.45</b>
Asda, Westwood Road, Broadstairs	£7.41	£8.80	£16.20	£8.02	£2.98	£2.00	£5.05	£50.45
Other Broadstairs	£0.54	£0.79	£13.61	£0.56	£0.64	£1.47	£0.93	£18.54
Other Zone 3	£0.15	£0.15	£3.05	£0.00	£0.00	£0.41	£0.20	£3.95
<b>Broadstairs Sub-Total</b>	<b>£8.10</b>	<b>£9.74</b>	<b>£32.86</b>	<b>£8.58</b>	<b>£3.62</b>	<b>£3.89</b>	<b>£6.17</b>	<b>£72.95</b>
Tesco, Manston Road, Ramsgate	£0.44	£1.09	£0.26	£21.26	£2.52	£4.36	£5.28	£35.21
Waitrose, Queen Street, Ramsgate	£0.15	£0.10	£0.84	£8.86	£0.49	£0.79	£1.98	£13.21
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.78	£8.11	£0.00	£0.56	£1.05	£10.50
Asda, Chatham Street, Ramsgate	£0.15	£0.00	£0.52	£7.09	£0.00	£0.00	£0.86	£8.61
Other Ramsgate	£0.74	£0.10	£1.88	£17.34	£0.72	£0.59	£1.12	£22.49
<b>Ramsgate Sub-Total</b>	<b>£1.48</b>	<b>£1.28</b>	<b>£4.28</b>	<b>£62.65</b>	<b>£3.73</b>	<b>£6.30</b>	<b>£10.30</b>	<b>£90.02</b>
Birchington	£0.00	£0.25	£0.00	£0.00	£7.61	£3.97	£0.62	£12.45
Westgate	£0.00	£1.48	£0.19	£0.00	£4.03	£0.12	£0.31	£6.13
<b>Birchington/Westgate Sub-Total</b>	<b>£0.00</b>	<b>£1.73</b>	<b>£0.19</b>	<b>£0.00</b>	<b>£11.64</b>	<b>£4.09</b>	<b>£0.93</b>	<b>£18.59</b>
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.11	£3.38	£0.18	£3.68
<b>District Total</b>	<b>£49.39</b>	<b>£49.02</b>	<b>£64.69</b>	<b>£92.95</b>	<b>£36.81</b>	<b>£24.96</b>	<b>£45.62</b>	<b>£363.44</b>
Canterbury	£0.00	£0.25	£0.13	£0.19	£0.60	£3.53	n/a	£4.70
Dover	£0.00	£0.15	£0.00	£0.00	£0.00	£0.53	n/a	£0.68
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.26	£0.12	n/a	£0.38
Sandwich	£0.00	£0.00	£0.00	£0.09	£0.00	£0.29	n/a	£0.39
<b>Total</b>	<b>£49.39</b>	<b>£49.42</b>	<b>£64.82</b>	<b>£93.23</b>	<b>£37.67</b>	<b>£29.43</b>		<b>£369.58</b>

Table 8: Convenience Expenditure 2031 (£m)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2031</b>	<b>£51.58</b>	<b>£51.60</b>	<b>£67.69</b>	<b>£97.35</b>	<b>£39.34</b>	<b>£30.74</b>	<b>n/a</b>	<b>£338.29</b>
Morrisons, College Walk, Margate	£6.29	£10.84	£0.41	£0.00	£1.81	£0.58	£2.21	£22.14
Aldi, Zion Place, Margate	£4.02	£1.91	£0.27	£0.00	£2.05	£0.15	£0.44	£8.84
Other Margate	£1.70	£6.04	£0.34	£0.00	£1.26	£0.22	£0.50	£10.05
Tesco Metro, Northdown Road, Cliftonville	£11.66	£0.98	£0.95	£0.19	£0.31	£0.00	£0.74	£14.84
Cliftonville	£1.75	£0.15	£0.27	£0.00	£0.00	£0.22	£0.13	£2.52
Other Zones 1/2	£0.15	£1.34	£0.00	£0.10	£0.00	£0.22	£0.10	£1.90
<b>Margate/Cliftonville Sub-Total</b>	<b>£25.58</b>	<b>£21.26</b>	<b>£2.23</b>	<b>£0.29</b>	<b>£5.43</b>	<b>£1.38</b>	<b>£4.12</b>	<b>£60.30</b>
Tesco Extra, Margate Road	£11.50	£10.01	£14.62	£13.34	£6.57	£3.26	£14.82	£74.12
Sainsbury's, Margate Road	£3.92	£5.83	£11.24	£7.01	£5.70	£2.37	£9.02	£45.08
Marks & Spencer, Westwood Cross	£0.41	£0.77	£0.47	£1.56	£0.63	£0.61	£1.12	£5.58
Other Westwood Cross	£0.15	£0.00	£0.00	£0.49	£0.16	£0.00	£0.20	£1.00
<b>Westwood Cross Sub-Total</b>	<b>£15.99</b>	<b>£16.62</b>	<b>£26.33</b>	<b>£22.39</b>	<b>£13.06</b>	<b>£6.24</b>	<b>£25.16</b>	<b>£125.78</b>
Asda, Westwood Road, Broadstairs	£7.74	£9.19	£16.92	£8.37	£3.11	£2.09	£5.27	£52.68
Other Broadstairs	£0.57	£0.83	£14.21	£0.58	£0.67	£1.54	£0.97	£19.37
Other Zone 3	£0.15	£0.15	£3.18	£0.00	£0.00	£0.43	£0.21	£4.13
<b>Broadstairs Sub-Total</b>	<b>£8.46</b>	<b>£10.17</b>	<b>£34.32</b>	<b>£8.96</b>	<b>£3.78</b>	<b>£4.06</b>	<b>£6.44</b>	<b>£76.17</b>
Tesco, Manston Road, Ramsgate	£0.46	£1.14	£0.27	£22.20	£2.64	£4.55	£5.51	£36.77
Waitrose, Queen Street, Ramsgate	£0.15	£0.10	£0.88	£9.25	£0.51	£0.83	£2.07	£13.80
Aldi, Boundary Road, Ramsgate	£0.00	£0.00	£0.81	£8.47	£0.00	£0.58	£1.10	£10.96
Asda, Chatham Street, Ramsgate	£0.15	£0.00	£0.54	£7.40	£0.00	£0.00	£0.90	£8.99
Other Ramsgate	£0.77	£0.10	£1.96	£18.11	£0.75	£0.61	£1.17	£23.48
<b>Ramsgate Sub-Total</b>	<b>£1.55</b>	<b>£1.34</b>	<b>£4.47</b>	<b>£65.42</b>	<b>£3.89</b>	<b>£6.58</b>	<b>£10.75</b>	<b>£94.00</b>
Birchington	£0.00	£0.26	£0.00	£0.00	£7.95	£4.15	£0.65	£13.00
Westgate	£0.00	£1.55	£0.20	£0.00	£4.21	£0.12	£0.32	£6.40
<b>Birchington/Westgate Sub-Total</b>	<b>£0.00</b>	<b>£1.81</b>	<b>£0.20</b>	<b>£0.00</b>	<b>£12.16</b>	<b>£4.27</b>	<b>£0.97</b>	<b>£19.41</b>
Other Thanet	£0.00	£0.00	£0.00	£0.00	£0.12	£3.53	£0.19	£3.84
<b>District Total</b>	<b>£51.58</b>	<b>£51.19</b>	<b>£67.55</b>	<b>£97.06</b>	<b>£38.43</b>	<b>£26.06</b>	<b>£47.64</b>	<b>£379.52</b>
Canterbury	£0.00	£0.26	£0.14	£0.19	£0.63	£3.69	n/a	£4.91
Dover	£0.00	£0.15	£0.00	£0.00	£0.00	£0.55	n/a	£0.71
Herne Bay	£0.00	£0.00	£0.00	£0.00	£0.28	£0.12	n/a	£0.40
Sandwich	£0.00	£0.00	£0.00	£0.10	£0.00	£0.31	n/a	£0.40
<b>Total</b>	<b>£51.58</b>	<b>£51.60</b>	<b>£67.69</b>	<b>£97.35</b>	<b>£39.34</b>	<b>£30.74</b>		<b>£385.93</b>

Table 9: Convenience Floorspace and Benchmark Turnover

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience Sales sq.m net	Turnover Density £ per sq.m net	Total Turnover £Million
<b>Margate/Cliftonville</b>					
Aldi, Zion Place, Margate	900	80%	720	£11,145	£8.02
Iceland, College Walk, Margate	480	95%	456	£6,451	£2.94
Morrisons, College Walk, Margate	1,991	85%	1,692	£12,369	£20.93
Tesco Express, Canterbury Road, Margate	226	95%	215	£12,221	£2.62
Other Town Centre Shops	511	100%	511	£6,000	£3.07
Tesco Metro, Northdown Road, Cliftonville	968	90%	871	£12,221	£10.64
Co-op, Summerfield Road, Cliftonville	148	95%	141	£10,298	£1.45
Marks & Spencer, Canterbury Road	111	95%	105	£11,283	£1.19
Farmfoods, Richborough Close, Margate	534	95%	508	£7,000	£3.55
<b>Total</b>	<b>5,869</b>		<b>5,219</b>		<b>£54.42</b>
<b>Westwood Cross</b>					
Marks & Spencer, Westwood Cross	918	100%	918	£11,283	£10.36
Sainsbury's, Dadson Way	7,616	55%	4,189	£11,068	£46.36
Lidl, Margate Road	1,171	80%	937	£8,661	£8.12
Tesco Extra, Margate Road	9,643	60%	5,786	£12,221	£70.70
Other Town Centre Shops	420	100%	420	£6,000	£2.52
<b>Total</b>	<b>19,768</b>		<b>12,249</b>		<b>£138.06</b>
<b>Broadstairs/St Peters</b>					
Asda, Westwood Road, Broadstairs	4,409	70%	3,086	£13,317	£41.10
Iceland, High Street, Broadstairs	383	95%	364	£6,451	£2.35
Tesco Metro, High Street, Broadstairs	331	95%	314	£12,221	£3.84
Other Town Centre Shops	1,113	100%	1,113	£6,000	£6.68
Co-op, Hopeville Avenue, St Peters	609	95%	579	£10,298	£5.96
Co-op, High Street, Broadstairs	245	95%	233	£10,298	£2.40
<b>Total</b>	<b>6,844</b>		<b>5,688</b>		<b>£62.31</b>
<b>Ramsgate</b>					
Aldi, Boundary Road, Ramsgate	950	80%	760	£11,145	£8.47
Asda, Chatham Street, Ramsgate	1,554	70%	1,088	£13,317	£14.49
Co-op, Grange Road, Ramsgate	162	95%	154	£10,298	£1.59
Co-op, Newington Road, Ramsgate	167	95%	159	£10,298	£1.63
Iceland, King Street, Ramsgate	305	95%	290	£6,451	£1.87
Lidl, Margate Road, Ramsgate	1,171	80%	937	£8,661	£8.12
Tesco, Manston Road, Ramsgate	2,759	85%	2,345	£12,221	£28.66
Waitrose, Queen Street, Ramsgate	1,289	95%	1,224	£13,042	£15.97
Tesco Express, Hereson Road, Ramsgate	256	95%	243	£12,221	£2.97
Tesco Express, High Street, Ramsgate	214	95%	204	£12,221	£2.49
Other Town Centre Shops	207	95%	196	£6,000	£1.18
<b>Total</b>	<b>9,034</b>		<b>7,600</b>		<b>£87.43</b>
<b>Birchington/Westgate</b>					
Co-op, Station Road, Birchington	524	95%	498	£10,298	£5.13
Co-op, Station Road, Birchington	485	95%	461	£10,298	£4.74
Co-op, Station Road, Westgate on Sea	241	95%	229	£10,298	£2.36
Other Birchington/Westgate	1,680	100%	1,680	£6,000	£10.08
<b>Total</b>	<b>2,930</b>		<b>2,867</b>		<b>£22.31</b>
<b>Other Thanet</b>					
Co-op, Tothill Street, Minster	148	95%	140	£10,298	£1.45
Other Thanet Local Shops	500	100%	500	£6,000	£3.00
<b>Total</b>	<b>648</b>		<b>640</b>		<b>£4.45</b>
<b>TOTAL</b>	<b>45,093</b>		<b>34,264</b>	<b>£10,769</b>	<b>£368.97</b>

Source: ORC StorePoint 2016, Goad and Global Data 2017



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

Town	2016	2021	2026	2031
<b>Available Expenditure in District</b>				
Margate/Cliftonville	£53.51	£55.21	£57.75	£60.30
Westwood Cross	£111.62	£115.15	£120.45	£125.78
Broadstairs/St Peters	£67.60	£69.73	£72.95	£76.17
Ramsgate	£83.41	£86.05	£90.02	£94.00
Birchington/Westgate	£17.22	£17.77	£18.59	£19.41
Other Thanet	£3.41	£3.52	£3.68	£3.84
<b>Total</b>	<b>£336.77</b>	<b>£347.43</b>	<b>£363.44</b>	<b>£379.52</b>
<b>Benchmark Turnover Existing Facilities</b>				
Margate/Cliftonville	£54.42	£54.42	£54.42	£54.42
Westwood Cross	£138.06	£138.06	£138.06	£138.06
Broadstairs/St Peters	£62.31	£62.31	£62.31	£62.31
Ramsgate	£87.43	£87.43	£87.43	£87.43
Birchington/Westgate	£22.31	£22.31	£22.31	£22.31
Other Thanet	£4.45	£4.45	£4.45	£4.45
<b>Total</b>	<b>£368.97</b>	<b>£368.97</b>	<b>£368.97</b>	<b>£368.97</b>
<b>Surplus Expenditure</b>				
Margate/Cliftonville	-£0.91	£0.78	£3.33	£5.88
Westwood Cross	-£26.44	-£22.91	-£17.60	-£12.28
Broadstairs/St Peters	£5.28	£7.42	£10.64	£13.86
Ramsgate	-£4.01	-£1.37	£2.59	£6.57
Birchington/Westgate	-£5.09	-£4.54	-£3.72	-£2.90
Other Thanet	-£1.03	-£0.93	-£0.76	-£0.60
<b>Total</b>	<b>-£32.20</b>	<b>-£21.54</b>	<b>-£5.54</b>	<b>£10.54</b>

Sources: Tables 5 to 9

**Table 11: Convenience Floorspace Capacity 2016 to 2031**

Town	2016	2021	2026	2031
<b>Turnover Density for New Floorspace £ psm</b>	£12,000	£12,000	£12,000	£12,000
<b>Floorspace (sq.m (net))</b>				
Margate/Cliftonville	-76	65	277	490
Westwood Cross	-2,203	-1,909	-1,467	-1,023
Broadstairs/St Peters	440	619	886	1,155
Ramsgate	-334	-114	216	548
Birchington/Westgate	-424	-378	-310	-242
Other Thanet	-86	-77	-64	-50
<b>Total</b>	<b>-2,683</b>	<b>-1,795</b>	<b>-461</b>	<b>878</b>
<b>Floorspace (sq.m (gross))</b>				
Margate/Cliftonville	-108	93	396	700
Westwood Cross	-3,148	-2,727	-2,096	-1,461
Broadstairs/St Peters	629	884	1,266	1,650
Ramsgate	-478	-163	309	783
Birchington/Westgate	-605	-541	-443	-345
Other Thanet	-123	-110	-91	-72
<b>Total</b>	<b>-3,834</b>	<b>-2,565</b>	<b>-659</b>	<b>1,255</b>



## **Appendix 3: Comparison Goods Capacity**

**Table 1: Population Projections**

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,826	22,905	24,020	25,185	26,305
Zone 2: Margate West	21,553	22,618	23,719	24,870	25,976
Zone 3: Broadstairs/Westwood	24,987	26,222	27,498	28,832	30,115
Zone 4: Ramsgate	40,389	42,385	44,448	46,604	48,678
Zone 5: Westgate/Birchington	14,966	15,706	16,470	17,269	18,037
Zone 6: Thanet Rural	10,681	11,209	11,754	12,325	12,873
<b>Total</b>	<b>134,402</b>	<b>141,044</b>	<b>147,910</b>	<b>155,083</b>	<b>161,985</b>

Sources: *Thanet Strategic Housing Market Assessment (2016) - adjusted for increased OAN - 15,660 to 17,140 homes*

**Table 2: Comparison Goods Expenditure Per Capita**

Expenditure Per Capita	2016	2021	2026	2031
Zone 1: Margate East	£2,567	£2,768	£3,217	£3,752
Zone 2: Margate West	£2,613	£2,818	£3,275	£3,819
Zone 3: Broadstairs/Westwood	£3,425	£3,694	£4,292	£5,006
Zone 4: Ramsgate	£2,696	£2,907	£3,379	£3,941
Zone 5: Westgate/Birchington	£3,104	£3,348	£3,890	£4,537
Zone 6: Thanet Rural	£3,471	£3,743	£4,350	£5,073

Sources:

*Experian local estimates for 2016 comparison goods expenditure per capita (2016 prices)*

*Growth Rates: 2016-17 = 2.3%; 2017-18 = 0.9%; 2018-19 = 2.1% and 3.2% p.a. beyond 2019*

*Excludes Special Forms of Trading*

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

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£58.80	£66.49	£81.02	£98.70	13.1%	37.8%	67.9%
Zone 2: Margate West	£59.10	£66.83	£81.44	£99.21	13.1%	37.8%	67.9%
Zone 3: Broadstairs/Westwood	£89.82	£101.57	£123.76	£150.76	13.1%	37.8%	67.9%
Zone 4: Ramsgate	£114.28	£129.22	£157.46	£191.82	13.1%	37.8%	67.9%
Zone 5: Westgate/Birchington	£48.76	£55.13	£67.18	£81.84	13.1%	37.8%	67.9%
Zone 6: Thanet Rural	£38.91	£44.00	£53.61	£65.31	13.1%	37.8%	67.9%
<b>Total</b>	<b>£409.67</b>	<b>£463.25</b>	<b>£564.47</b>	<b>£687.64</b>	<b>13.1%</b>	<b>37.8%</b>	<b>67.9%</b>

Sources: *Table 1 and Table 2*

**Table 4: Base Year Comparison Market Shares (%)**

Centres	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%
<b>District Total</b>	<b>87.4%</b>	<b>84.9%</b>	<b>82.2%</b>	<b>86.9%</b>	<b>79.9%</b>	<b>73.6%</b>	
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
<b>Market Share Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey, July 2012 with Lichfields adjustments

**Table 5: Comparison Expenditure 2016 (£m)**

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2016</b>	<b>£58.80</b>	<b>£59.10</b>	<b>£89.82</b>	<b>£114.28</b>	<b>£48.76</b>	<b>£38.91</b>		<b>£409.67</b>
Margate High Street/Old Town	£10.58	£8.22	£3.77	£2.97	£3.46	£1.36	£3.37	£33.74
Westwood Cross	£34.99	£31.44	£49.13	£54.17	£25.50	£18.72	£91.69	£305.64
Broadstairs	£3.47	£5.02	£14.10	£9.83	£1.17	£1.52	£3.90	£39.01
Ramsgate	£2.00	£1.89	£5.93	£30.97	£1.41	£4.05	£5.14	£51.39
Birchington/Westgate	£0.12	£3.37	£0.81	£1.14	£7.36	£2.57	£0.81	£16.18
Other Thanet	£0.24	£0.24	£0.09	£0.23	£0.05	£0.43	£0.07	£1.33
<b>District Total</b>	<b>£51.39</b>	<b>£50.18</b>	<b>£73.83</b>	<b>£99.31</b>	<b>£38.96</b>	<b>£28.64</b>	<b>£104.98</b>	<b>£447.29</b>
Canterbury	£4.47	£6.50	£9.61	£9.60	£7.65	£8.09	n/a	£45.93
Dover	£0.12	£0.06	£0.36	£0.57	£0.20	£0.27	n/a	£1.57
Deal	£0.06	£0.00	£0.09	£0.11	£0.05	£0.00	n/a	£0.31
Herne Bay	£0.12	£0.12	£0.09	£0.11	£0.15	£0.23	n/a	£0.82
Sandwich	£0.12	£0.06	£0.00	£0.23	£0.00	£0.00	n/a	£0.41
Other Outside District	£2.53	£2.19	£5.84	£4.34	£1.76	£1.67	n/a	£18.32
<b>Total</b>	<b>£58.80</b>	<b>£59.10</b>	<b>£89.82</b>	<b>£114.28</b>	<b>£48.76</b>	<b>£38.91</b>		<b>£514.65</b>

**Table 6: Comparison Expenditure 2021 (£m)**

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2021</b>	<b>£66.49</b>	<b>£66.83</b>	<b>£101.57</b>	<b>£129.22</b>	<b>£55.13</b>	<b>£44.00</b>		<b>£463.25</b>
Margate High Street/Old Town	£11.97	£9.29	£4.27	£3.36	£3.91	£1.54	£3.82	£38.15
Westwood Cross	£39.56	£35.56	£55.56	£61.25	£28.84	£21.16	£103.68	£345.61
Broadstairs	£3.92	£5.68	£15.95	£11.11	£1.32	£1.72	£4.41	£44.11
Ramsgate	£2.26	£2.14	£6.70	£35.02	£1.60	£4.58	£5.81	£58.11
Birchington/Westgate	£0.13	£3.81	£0.91	£1.29	£8.33	£2.90	£0.91	£18.29
Other Thanet	£0.27	£0.27	£0.10	£0.26	£0.06	£0.48	£0.08	£1.51
<b>District Total</b>	<b>£58.12</b>	<b>£56.74</b>	<b>£83.49</b>	<b>£112.30</b>	<b>£44.05</b>	<b>£32.38</b>	<b>£118.71</b>	<b>£505.79</b>
Canterbury	£5.05	£7.35	£10.87	£10.85	£8.66	£9.15	n/a	£51.94
Dover	£0.13	£0.07	£0.41	£0.65	£0.22	£0.31	n/a	£1.78
Deal	£0.07	£0.00	£0.10	£0.13	£0.06	£0.00	n/a	£0.35
Herne Bay	£0.13	£0.13	£0.10	£0.13	£0.17	£0.26	n/a	£0.93
Sandwich	£0.13	£0.07	£0.00	£0.26	£0.00	£0.00	n/a	£0.46
Other Outside District	£2.86	£2.47	£6.60	£4.91	£1.98	£1.89	n/a	£20.72
<b>Total</b>	<b>£66.49</b>	<b>£66.83</b>	<b>£101.57</b>	<b>£129.22</b>	<b>£55.13</b>	<b>£44.00</b>		<b>£581.96</b>

**Table 7: Comparison Expenditure 2026 (£m)**

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2026</b>	<b>£81.02</b>	<b>£81.44</b>	<b>£123.76</b>	<b>£157.46</b>	<b>£67.18</b>	<b>£53.61</b>		<b>£564.47</b>
Margate High Street/Old Town	£14.58	£11.32	£5.20	£4.09	£4.77	£1.88	£4.65	£46.49
Westwood Cross	£48.21	£43.32	£67.70	£74.63	£35.14	£25.79	£126.34	£421.12
Broadstairs	£4.78	£6.92	£19.43	£13.54	£1.61	£2.09	£5.38	£53.75
Ramsgate	£2.75	£2.61	£8.17	£42.67	£1.95	£5.58	£7.08	£70.80
Birchington/Westgate	£0.16	£4.64	£1.11	£1.57	£10.14	£3.54	£1.11	£22.29
Other Thanet	£0.32	£0.33	£0.12	£0.31	£0.07	£0.59	£0.09	£1.84
<b>District Total</b>	<b>£70.81</b>	<b>£69.14</b>	<b>£101.73</b>	<b>£136.83</b>	<b>£53.68</b>	<b>£39.46</b>	<b>£144.65</b>	<b>£616.29</b>
Canterbury	£6.16	£8.96	£13.24	£13.23	£10.55	£11.15	n/a	£63.28
Dover	£0.16	£0.08	£0.50	£0.79	£0.27	£0.38	n/a	£2.17
Deal	£0.08	£0.00	£0.12	£0.16	£0.07	£0.00	n/a	£0.43
Herne Bay	£0.16	£0.16	£0.12	£0.16	£0.20	£0.32	n/a	£1.13
Sandwich	£0.16	£0.08	£0.00	£0.31	£0.00	£0.00	n/a	£0.56
Other Outside District	£3.48	£3.01	£8.04	£5.98	£2.42	£2.31	n/a	£25.25
<b>Total</b>	<b>£81.02</b>	<b>£81.44</b>	<b>£123.76</b>	<b>£157.46</b>	<b>£67.18</b>	<b>£53.61</b>		<b>£709.11</b>

**Table 8: Comparison Expenditure 2031 (£m)**

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2031</b>	<b>£98.70</b>	<b>£99.21</b>	<b>£150.76</b>	<b>£191.82</b>	<b>£81.84</b>	<b>£65.31</b>		<b>£687.64</b>
Margate High Street/Old Town	£17.77	£13.79	£6.33	£4.99	£5.81	£2.29	£5.66	£56.64
Westwood Cross	£58.73	£52.78	£82.47	£90.92	£42.80	£31.41	£153.91	£513.02
Broadstairs	£5.82	£8.43	£23.67	£16.50	£1.96	£2.55	£6.55	£65.48
Ramsgate	£3.36	£3.17	£9.95	£51.98	£2.37	£6.79	£8.63	£86.25
Birchington/Westgate	£0.20	£5.65	£1.36	£1.92	£12.36	£4.31	£1.36	£27.15
Other Thanet	£0.39	£0.40	£0.15	£0.38	£0.08	£0.72	£0.11	£2.24
<b>District Total</b>	<b>£86.27</b>	<b>£84.23</b>	<b>£123.93</b>	<b>£166.69</b>	<b>£65.39</b>	<b>£48.07</b>	<b>£176.21</b>	<b>£750.78</b>
Canterbury	£7.50	£10.91	£16.13	£16.11	£12.85	£13.58	n/a	£77.09
Dover	£0.20	£0.10	£0.60	£0.96	£0.33	£0.46	n/a	£2.64
Deal	£0.10	£0.00	£0.15	£0.19	£0.08	£0.00	n/a	£0.52
Herne Bay	£0.20	£0.20	£0.15	£0.19	£0.25	£0.39	n/a	£1.38
Sandwich	£0.20	£0.10	£0.00	£0.38	£0.00	£0.00	n/a	£0.68
Other Outside District	£4.24	£3.67	£9.80	£7.29	£2.95	£2.81	n/a	£30.76
<b>Total</b>	<b>£98.70</b>	<b>£99.21</b>	<b>£150.76</b>	<b>£191.82</b>	<b>£81.84</b>	<b>£65.31</b>		<b>£863.86</b>

**Table 9: Comparison Goods Floorspace 2016**

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

**Table 10: Summary of Comparison Shopping Patterns 2016 to 2031**

Town	2016	2021	2026	2031
<b>Available Expenditure in District</b>				
Margate/Cliftonville	£33.74	£38.15	£46.49	£56.64
Westwood Cross	£305.64	£345.61	£421.12	£513.02
Broadstairs	£39.01	£44.11	£53.75	£65.48
Ramsgate	£51.39	£58.11	£70.80	£86.25
Birchington/Westgate	£16.18	£18.29	£22.29	£27.15
Other Thanet	£1.33	£1.51	£1.84	£2.24
<b>Total</b>	<b>£447.29</b>	<b>£505.79</b>	<b>£616.29</b>	<b>£750.78</b>
<b>Benchmark Turnover of Existing Facilities</b>				
Margate/Cliftonville	£33.74	£37.25	£41.13	£45.41
Westwood Cross	£305.64	£337.45	£372.57	£411.35
Broadstairs	£39.01	£43.07	£47.56	£52.50
Ramsgate	£51.39	£56.74	£62.64	£69.16
Birchington/Westgate	£16.18	£17.86	£19.72	£21.77
Other Thanet	£1.33	£1.47	£1.63	£1.79
<b>Total</b>	<b>£447.29</b>	<b>£493.84</b>	<b>£545.24</b>	<b>£601.99</b>
<b>Surplus/Deficit Expenditure</b>				
Margate/Cliftonville	£0.00	£0.90	£5.36	£11.22
Westwood Cross	£0.00	£8.16	£48.55	£101.67
Broadstairs	£0.00	£1.04	£6.20	£12.98
Ramsgate	£0.00	£1.37	£8.16	£17.09
Birchington/Westgate	£0.00	£0.43	£2.57	£5.38
Other Thanet	£0.00	£0.04	£0.21	£0.44
<b>Total</b>	<b>£0.00</b>	<b>£11.94</b>	<b>£71.05</b>	<b>£148.79</b>

Sources: Tables 5 to 9

**Table 11: Comparison Floorspace Capacity 2016 to 2031**

Town	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£6,000	£6,624	£7,314	£8,075
<b>Sales Floorspace (sq.m net)</b>				
Margate/Cliftonville	0	136	733	1,390
Westwood Cross	0	1,232	6,638	12,590
Broadstairs	0	157	847	1,607
Ramsgate	0	207	1,116	2,117
Birchington/Westgate	0	65	351	666
Other Thanet	0	5	29	55
<b>Total</b>	<b>0</b>	<b>1,803</b>	<b>9,714</b>	<b>18,426</b>
<b>Floorspace (sq.m gross)</b>				
Margate/Cliftonville	0	181	977	1,853
Westwood Cross	0	1,643	8,851	16,787
Broadstairs	0	210	1,130	2,143
Ramsgate	0	276	1,488	2,822
Birchington/Westgate	0	87	468	889
Other Thanet	0	7	39	73
<b>Total</b>	<b>0</b>	<b>2,404</b>	<b>12,952</b>	<b>24,567</b>



## **Appendix 4: Food/Beverage Capacity**

**Table 1: Population Projections**

Zone Area	2011	2016	2021	2026	2031
Zone 1: Margate East	21,826	22,905	24,020	25,185	26,305
Zone 2: Margate West	21,553	22,618	23,719	24,870	25,976
Zone 3: Broadstairs/Westwood	24,987	26,222	27,498	28,832	30,115
Zone 4: Ramsgate	40,389	42,385	44,448	46,604	48,678
Zone 5: Westgate/Birchington	14,966	15,706	16,470	17,269	18,037
Zone 6: Thanet Rural	10,681	11,209	11,754	12,325	12,873
<b>Total</b>	<b>134,402</b>	<b>141,044</b>	<b>147,910</b>	<b>155,083</b>	<b>161,985</b>

Sources: Thanet Strategic Housing Market Assessment (2016) - adjusted for increased OAN - 15,660 to 17,140 homes

**Table 2: Food and Beverage Expenditure Per Capita**

Expenditure Per Capita	2016	2021	2026	2031
Zone 1: Margate East	£908	£937	£992	£1,053
Zone 2: Margate West	£944	£975	£1,031	£1,095
Zone 3: Broadstairs/Westwood	£1,223	£1,263	£1,336	£1,418
Zone 4: Ramsgate	£975	£1,007	£1,065	£1,131
Zone 5: Westgate/Birchington	£1,094	£1,129	£1,195	£1,269
Zone 6: Thanet Rural	£1,173	£1,211	£1,282	£1,360

Sources:

Experian Local Expenditure 2016 (2016 prices)

Growth Rates: 2016-17 = 0.3%; 2017-18 = -0.1%; 2018-19 = 0.8% and 1.1% p.a. beyond 2019

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

Zone	2016	2021	2026	2031	Growth 2016-2021	Growth 2016-2026	Growth 2016-2031
Zone 1: Margate East	£20.80	£22.52	£24.98	£27.70	8.3%	20.1%	33.2%
Zone 2: Margate West	£21.35	£23.12	£25.65	£28.44	8.3%	20.1%	33.2%
Zone 3: Broadstairs/Westwood	£32.07	£34.72	£38.53	£42.71	8.3%	20.1%	33.2%
Zone 4: Ramsgate	£41.33	£44.74	£49.64	£55.04	8.3%	20.1%	33.2%
Zone 5: Westgate/Birchington	£17.18	£18.60	£20.64	£22.88	8.3%	20.1%	33.2%
Zone 6: Thanet Rural	£13.15	£14.23	£15.79	£17.51	8.3%	20.1%	33.2%
<b>Total</b>	<b>£145.87</b>	<b>£157.92</b>	<b>£175.24</b>	<b>£194.29</b>	<b>8.3%</b>	<b>20.1%</b>	<b>33.2%</b>

Sources: Table 1 and Table 2

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

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

Source: NEMS Household Survey, July 2012 with NLP adjustments

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

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2016</b>	<b>£20.80</b>	<b>£21.35</b>	<b>£32.07</b>	<b>£41.33</b>	<b>£17.18</b>	<b>£13.15</b>		<b>£145.87</b>
Margate High Street/Old Town	£4.86	£5.79	£1.23	£1.33	£1.65	£0.29	£1.68	£16.84
Westwood Cross	£3.56	£4.38	£2.56	£7.16	£2.68	£1.31	£9.28	£30.92
Broadstairs	£3.91	£3.13	£19.90	£6.04	£1.04	£1.48	£3.94	£39.45
Ramsgate	£2.13	£1.41	£2.35	£20.73	£1.12	£0.74	£3.17	£31.66
Birchington/Westgate	£0.78	£2.46	£0.47	£0.17	£6.63	£2.04	£0.66	£13.21
Other Thanet	£3.18	£2.30	£1.79	£1.52	£1.50	£4.21	£0.76	£15.26
<b>District Total</b>	<b>£18.43</b>	<b>£19.45</b>	<b>£28.30</b>	<b>£36.96</b>	<b>£14.63</b>	<b>£10.06</b>	<b>£19.49</b>	<b>£147.33</b>
Canterbury	£0.53	£0.42	£0.85	£0.94	£0.97	£0.34	n/a	£4.06
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.07	£0.09	£0.00	£0.33	£0.15	£0.24	n/a	£0.87
Herne Bay	£0.23	£0.41	£0.00	£0.00	£0.15	£0.29	n/a	£1.08
Sandwich	£0.38	£0.16	£0.75	£0.42	£0.15	£0.59	n/a	£2.46
Other Outside District	£1.15	£0.82	£2.17	£2.68	£1.13	£1.62	n/a	£9.57
<b>Total</b>	<b>£20.80</b>	<b>£21.35</b>	<b>£32.07</b>	<b>£41.33</b>	<b>£17.18</b>	<b>£13.15</b>		<b>£165.37</b>

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

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2021</b>	<b>£22.52</b>	<b>£23.12</b>	<b>£34.72</b>	<b>£44.74</b>	<b>£18.60</b>	<b>£14.23</b>		<b>£157.92</b>
Margate High Street/Old Town	£5.27	£6.26	£1.33	£1.44	£1.79	£0.32	£1.82	£18.23
Westwood Cross	£3.86	£4.74	£2.77	£7.75	£2.90	£1.41	£10.04	£33.47
Broadstairs	£4.24	£3.38	£21.54	£6.54	£1.13	£1.60	£4.27	£42.71
Ramsgate	£2.30	£1.53	£2.55	£22.45	£1.22	£0.80	£3.43	£34.27
Birchington/Westgate	£0.84	£2.66	£0.51	£0.19	£7.18	£2.21	£0.72	£14.30
Other Thanet	£3.45	£2.49	£1.94	£1.65	£1.62	£4.55	£0.83	£16.52
<b>District Total</b>	<b>£19.95</b>	<b>£21.06</b>	<b>£30.64</b>	<b>£40.01</b>	<b>£15.84</b>	<b>£10.90</b>	<b>£21.10</b>	<b>£159.50</b>
Canterbury	£0.57	£0.45	£0.92	£1.02	£1.06	£0.37	n/a	£4.39
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.08	£0.09	£0.00	£0.35	£0.16	£0.26	n/a	£0.95
Herne Bay	£0.25	£0.44	£0.00	£0.00	£0.16	£0.32	n/a	£1.17
Sandwich	£0.42	£0.18	£0.82	£0.46	£0.16	£0.63	n/a	£2.66
Other Outside District	£1.25	£0.89	£2.35	£2.90	£1.22	£1.75	n/a	£10.36
<b>Total</b>	<b>£22.52</b>	<b>£23.12</b>	<b>£34.72</b>	<b>£44.74</b>	<b>£18.60</b>	<b>£14.23</b>		<b>£179.03</b>

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

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2026</b>	<b>£24.98</b>	<b>£25.65</b>	<b>£38.53</b>	<b>£49.64</b>	<b>£20.64</b>	<b>£15.79</b>		<b>£175.24</b>
Margate High Street/Old Town	£5.84	£6.95	£1.47	£1.60	£1.99	£0.35	£2.02	£20.22
Westwood Cross	£4.28	£5.26	£3.07	£8.60	£3.22	£1.57	£11.14	£37.14
Broadstairs	£4.70	£3.75	£23.90	£7.26	£1.26	£1.78	£4.74	£47.39
Ramsgate	£2.55	£1.70	£2.83	£24.91	£1.35	£0.89	£3.80	£38.03
Birchington/Westgate	£0.94	£2.95	£0.57	£0.21	£7.97	£2.45	£0.79	£15.87
Other Thanet	£3.82	£2.76	£2.16	£1.83	£1.80	£5.05	£0.92	£18.33
<b>District Total</b>	<b>£22.14</b>	<b>£23.37</b>	<b>£34.00</b>	<b>£44.40</b>	<b>£17.58</b>	<b>£12.09</b>	<b>£23.42</b>	<b>£176.99</b>
Canterbury	£0.64	£0.50	£1.02	£1.13	£1.17	£0.41	n/a	£4.88
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.09	£0.10	£0.00	£0.39	£0.18	£0.29	n/a	£1.05
Herne Bay	£0.27	£0.49	£0.00	£0.00	£0.18	£0.35	n/a	£1.30
Sandwich	£0.46	£0.19	£0.91	£0.51	£0.18	£0.70	n/a	£2.95
Other Outside District	£1.38	£0.98	£2.60	£3.21	£1.36	£1.95	n/a	£11.49
<b>Total</b>	<b>£24.98</b>	<b>£25.65</b>	<b>£38.53</b>	<b>£49.64</b>	<b>£20.64</b>	<b>£15.79</b>		<b>£198.66</b>

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

Centres	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
<b>Expenditure 2031</b>	<b>£27.70</b>	<b>£28.44</b>	<b>£42.71</b>	<b>£55.04</b>	<b>£22.88</b>	<b>£17.51</b>		<b>£194.29</b>
Margate High Street/Old Town	£6.48	£7.71	£1.63	£1.77	£2.20	£0.39	£2.24	£22.42
Westwood Cross	£4.75	£5.83	£3.40	£9.53	£3.57	£1.74	£12.35	£41.18
Broadstairs	£5.21	£4.16	£26.50	£8.05	£1.39	£1.97	£5.25	£52.54
Ramsgate	£2.83	£1.88	£3.14	£27.62	£1.50	£0.99	£4.22	£42.16
Birchington/Westgate	£1.04	£3.27	£0.63	£0.23	£8.83	£2.71	£0.88	£17.60
Other Thanet	£4.24	£3.06	£2.39	£2.03	£1.99	£5.60	£1.02	£20.33
<b>District Total</b>	<b>£24.55</b>	<b>£25.91</b>	<b>£37.69</b>	<b>£49.22</b>	<b>£19.49</b>	<b>£13.40</b>	<b>£25.96</b>	<b>£196.23</b>
Canterbury	£0.70	£0.56	£1.13	£1.26	£1.30	£0.46	n/a	£5.41
Dover	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Deal	£0.10	£0.11	£0.00	£0.44	£0.20	£0.32	n/a	£1.16
Herne Bay	£0.30	£0.55	£0.00	£0.00	£0.20	£0.39	n/a	£1.44
Sandwich	£0.51	£0.22	£1.01	£0.56	£0.20	£0.78	n/a	£3.27
Other Outside District	£1.54	£1.09	£2.89	£3.56	£1.51	£2.16	n/a	£12.74
<b>Total</b>	<b>£27.70</b>	<b>£28.44</b>	<b>£42.71</b>	<b>£55.04</b>	<b>£22.88</b>	<b>£17.51</b>		<b>£220.25</b>

**Table 9: Food and Beverage Floorspace 2016**

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

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

Town	2016	2021	2026	2031
<b>Available Expenditure in District (£m)</b>				
Margate/Cliftonville	£16.84	£18.23	£20.22	£22.42
Westwood Cross	£30.92	£33.47	£37.14	£41.18
Broadstairs	£39.45	£42.71	£47.39	£52.54
Ramsgate	£31.66	£34.27	£38.03	£42.16
Birchington/Westgate	£13.21	£14.30	£15.87	£17.60
Other Thanet	£15.26	£16.52	£18.33	£20.33
<b>Total</b>	<b>£147.33</b>	<b>£159.50</b>	<b>£176.99</b>	<b>£196.23</b>
<b>Benchmark Turnover Existing Facilities (£m)</b>				
Margate/Cliftonville	£16.84	£17.69	£18.60	£19.55
Westwood Cross	£30.92	£32.50	£34.15	£35.90
Broadstairs	£39.45	£41.46	£43.57	£45.80
Ramsgate	£31.66	£33.27	£34.97	£36.75
Birchington/Westgate	£13.21	£13.88	£14.59	£15.34
Other Thanet	£15.26	£16.04	£16.86	£17.72
<b>Total</b>	<b>£147.33</b>	<b>£154.85</b>	<b>£162.75</b>	<b>£171.05</b>
<b>Surplus/Deficit Expenditure (£m)</b>				
Margate/Cliftonville	£0.00	£0.53	£1.63	£2.88
Westwood Cross	£0.00	£0.98	£2.99	£5.28
Broadstairs	£0.00	£1.25	£3.81	£6.74
Ramsgate	£0.00	£1.00	£3.06	£5.41
Birchington/Westgate	£0.00	£0.42	£1.28	£2.26
Other Thanet	£0.00	£0.48	£1.48	£2.61
<b>Total</b>	<b>£0.00</b>	<b>£4.66</b>	<b>£14.24</b>	<b>£25.18</b>

Sources: Tables 5 to 9

**Table 11: Food and Beverage Floorspace Capacity 2016 to 2031**

Town	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,000	£5,255	£5,523	£5,805
<b>Floorspace Requirement (sq.m gross)</b>				
Margate/Cliftonville	0	101	295	496
Westwood Cross	0	186	541	910
Broadstairs	0	237	691	1,161
Ramsgate	0	190	554	932
Birchington/Westgate	0	79	231	389
Other Thanet	0	92	267	449
<b>Total</b>	<b>0</b>	<b>886</b>	<b>2,579</b>	<b>4,338</b>



**Bristol**  
0117 403 1980  
bristol@lichfields.uk

**Cardiff**  
029 2043 5880  
cardiff@lichfields.uk

**Edinburgh**  
0131 285 0670  
edinburgh@lichfields.uk

**Leeds**  
0113 397 1397  
leeds@lichfields.uk

**London**  
020 7837 4477  
london@lichfields.uk

**Manchester**  
0161 837 6130  
manchester@lichfields.uk

**Newcastle**  
0191 261 5685  
newcastle@lichfields.uk

**Thames Valley**  
0118 334 1920  
thamesvalley@lichfields.uk