

# **Canterbury Retail and Leisure Study Update Report**

Canterbury City Council

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# Contents

<b>1.0</b>	<b>Introduction</b>	<b>1</b>
	Purpose of the report	1
	Report structure	2
<b>2.0</b>	<b>Updated floorspace capacity assessment</b>	<b>3</b>
	Introduction	3
	Implications of Brexit, Covid-19 and other trends	3
	Study area	5
	Population projections	6
	Expenditure forecasts	6
	Growth in turnover densities	7
	Base year market shares	7
	Capacity for convenience goods retail floorspace	7
	Capacity for comparison goods floorspace	8
<b>3.0</b>	<b>Commercial leisure uses</b>	<b>10</b>
	Introduction	10
	Leisure and cultural expenditure	10
	Leisure, food/beverage floorspace capacity	11
	Conclusions on commercial leisure and other town centre uses	17
<b>4.0</b>	<b>Implications for emerging policy</b>	<b>18</b>
	Introduction	18
	Floorspace capacity projections	19
	Impact and sequential tests	21
	Town centre boundary and primary shopping areas	21



## 1.0 Introduction

### Purpose of the report

1.1 Lichfields was commissioned by Canterbury City Council to prepare an update of the Canterbury Retail and Leisure Study (CRLS 2020). The key objective of the CRLS 2020 was to provide a robust and credible evidence base to inform the emerging Local Plan. The study provided a quantitative and qualitative assessment of the need for new retail and leisure uses over the plan period.

1.2 This 2022 update should be read alongside the CRLS 2020 but replaces the following sections of the CRLS 2020:

1.1 The output of the above will be a partial update of the following elements of the RLS:

- Section 2 – UK Leisure and Retail Trends;
- Section 7 – the need for additional retail facilities;
- Section 8 – the need for additional commercial leisure uses;
- Section 6 – the need for other main town centre uses;
- Section 11 – Summary and recommendations (relevant parts);
- Appendix 7 – convenience goods capacity; and
- Appendix 8 – comparison goods capacity.

1.3 Previously main town centre uses, as defined by the NPPF, fell into to a range of different use classes e.g. A1 retail, A3/A4/A5 food/beverage, some D2 leisure uses and B1 offices. Evidence based studies have historically provided floorspace projections within these use class categories.

1.4 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

1.5 The UCO changes combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as ‘main town centre uses’ within the NPPF e.g., medical services and some light industrial uses.

1.6 This study update only provides floorspace projections for selected activities now within Class E, but it does not quantify the need for office floorspace.

1.7 The floorspace capacity projections in this report relate to convenience and comparison goods retail (previously A1) and restaurant/café (previously A3) use now in Class E and Sui Generis uses i.e., pubs/bar (previously A4) and takeaways (A5). Need projections within future development plans can continue to refer to separate floorspace projections for convenience and comparison goods retail and food/beverage uses.

## **Report structure**

- 1.8 Section 2 of this report provides an update of the retail floorspace capacity assessment based on the latest available population and expenditure projections.
- 1.9 Section 3 updates the need assessment for commercial leisure and food/beverage uses.
- 1.10 Section 4 reviews the potential policy implications for the emerging new Local Plan arising from the updated need assessment.

## 2.0 Updated floorspace capacity assessment

### Introduction

2.1 This section updates and rolls forward the quantitative assessment of the scope for new retail and food/beverage floorspace in the district during the period up to 2045. The updated projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential longer-term implications of the Covid-19 crisis.

### Implications of Brexit, Covid-19 and other trends

2.2 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

2.3 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021, 2022 and 2023) for retail and leisure were published in January 2022 and now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure during 2020 and 2021; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.5 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short-term supply chain disruption has led to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery have benefitted at least in the short term. There is likely to be a longer term structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.6 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g. most recently Gap and Wilko.

2.7 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the local plan period with interval projections (i.e. 2020 base year to 2025, 2025 to 2035, 2030 to 2035, 2035 to 2040 and 2040 to 2045), development plan

policy should assume population projections will return to projected levels by 2025. The first interval population projections at 2025, and certainly later years, should not be significantly affected by the Covid-19 crisis.

- 2.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. The latest seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to November 2020.
- 2.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 2.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.12 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.13 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

### **Long-term expenditure trends**

- 2.14 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.



- 2.15 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Canterbury local authority area is likely to relate to population growth or qualitative areas of deficiency.
- 2.16 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.17 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:
- "After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."*
- 2.18 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

### **Demand for town centre floorspace**

- 2.19 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.7% in 2021. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping.
- 2.20 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the Covid-19 pandemic, at least in the short-term.
- 2.21 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

### **Study area**

- 2.22 As in the CRLS 2020, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the Canterbury authority

area. The study area is sub-divided into 14 zones as shown in Appendix 1. Zones 1 to 6 cover the Canterbury authority area.

## Population projections

2.23 Experian's MMG3 population projections have been adopted as shown in Table 1 (Appendix 1). These projections are consistent with ONS based projections. Population within the study area is projected to increase by 11.5% between 2020 to 2040, increasing from 1,180,099 in 2020 to 1,315,705 in 2040. The 2020 study, also based on Experian projections, adopted slightly higher population growth of +14.7% between 2020 and 2040 (note - the 2020 study did not included projections up to 2045).

## Expenditure forecasts

2.24 All monetary values expressed in this update report are at 2020 prices, consistent with Experian's latest expenditure information. The CRLS 2020 adopted a 2018 price base and therefore the figures are not directly comparable.

2.25 Experian's latest local expenditure figures for the Canterbury study area in 2020. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect current economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:

- convenience goods: -5.5%;
- comparison goods: +7.0%;
- leisure: +52.8%.

2.26 Experian's short term forecasts, particularly for comparison goods and leisure, assume a post-Covid lockdowns recovery during 2021 and 2022. Experian's medium and long term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for during 2024 and beyond;
- comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
- leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.

2.27 These growth figures relate to real growth and exclude inflation.

2.28 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2020 were:

- 5.4% of convenience goods expenditure; and
- 25.6% of comparison goods expenditure.

2.29 Experian's projections suggest that these SFT percentages will increase to 7.1% and 28.3% by 2030 respectively. The long term Experian projections suggest an increase to 7.7% and 30.1% by 2040 respectively (note – Experian does not provided projections beyond 2040).

2.30 Table 1 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2045, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 1 in Appendix 3.

2.31 Allowing for population growth, total convenience goods spending within the study area is forecast to increase by +12.4% from £2,940 million in 2022 to £3,306 million in 2045, as shown

in Table 2 (Appendix 2). Comparison goods spending is forecast to increase by +97.9% between 2022 and 2045, increasing from £3,832 million in 2022 to £7,584 million, as shown in Table 2 (Appendix 3).

## Growth in turnover densities

2.32 Experian's Retail Planner Briefing Note 19 - January 2021 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +9.4% during 2021 to 2023, recovering from the impact of the Covid crisis, but lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond 2028). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a decrease of -5.5% during 2021 to 2023, but growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.

## Base year market shares

2.33 Expenditure patterns in the base year adopt market shares within each study area zones taken from the CRLS 2020. These market shares were calculated from the results of a household shopper survey in May 2019. These market shares are assumed to have remained constant up to 2022 and beyond, because there have been no significant changes in retail provision since 2019, although SFT expenditure deducted has increased based on Experian's latest data.

## Capacity for convenience goods retail floorspace

2.34 Available convenience goods expenditure attracted to Canterbury authority area has been projected from the 2022 base year forward to 2025, 2030, 2035, 2040 and 2045, and is summarised in Table 10 in Appendix 2. Convenience goods expenditure available to facilities within the authority area is expected to increase from about £464 million in 2022 to £522 million in 2045. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the main destinations is set out in Table 2.1.

Table 2.1 Convenience goods turnover in 2022

Destination	2022 Turnover £m
Zone 1 - Canterbury	242.55
Zone 5 - Herne Bay	89.96
Zone 6 - Whitstable	117.31
Other rural zones	14.11
<b>Total</b>	<b>463.93</b>

Source: Table 10, Appendix 2

2.35 Table 10 in Appendix 2 subtract the turnover of existing floorspace and commitments from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future. There is a projected convenience goods expenditure deficit up to and beyond 2030, due to increases in sales densities and the implementation of commitments. Longer term growth suggests a surplus of +£4.98 million in 2035, increasing to +£16.64 million by 2040 and +£30.3 million by 2045.

- 2.36 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 11 in Appendix 2, based on an average sales density of £12,000 per sq.m net in 2022, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The results are summarised in Table 2.2.

Table 2.2 Convenience goods floorspace capacity (sq.m net) – (cumulative)

Area	2025	2030	2035	2040	2045
Zone 1 - Canterbury	-857	-369	173	679	1,272
Zone 5 - Herne Bay	-221	-40	161	349	569
Zone 6 - Whitstable	-288	-52	210	455	742
Other rural zones	-189	-161	-130	-100	-65
<b>Total</b>	<b>-1,555</b>	<b>-623</b>	<b>414</b>	<b>1,383</b>	<b>2,517</b>

Source: Table 11, Appendix 2

- 2.37 Surplus expenditure up to 2045 indicates that there is capacity for additional convenience goods floorspace in the authority area of 2,517 sq.m net. The combined projection for the three main destinations (Canterbury, Herne Bay and Whitstable) is 2,583 sq.m net.
- 2.38 The 2040 projection in the CRLS 2020 was marginally higher than the update projection (1,383 sq.m net) ranging from 2,066 sq.m net to 6,307 sq.m net. This difference is primarily due to lower population projections adopted in this update.

### Capacity for comparison goods floorspace

- 2.39 Available comparison goods expenditure has been projected to 2025, 2030, 2035, 2040 and 2045, summarised in Tables 10 in Appendix 3. Comparison goods expenditure available to facilities within the authority area is expected to increase from £810 million in 2022 to £1,678 million in 2045.
- 2.40 Tables 10 in Appendix 3 subtracts the turnover of existing floorspace (including an allowance for growth in turnover densities) from available expenditure to calculate the amount of surplus expenditure available for new development. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to 2025 i.e., existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 2.41 By 2030 there is an expenditure surplus of +£23.77 million, increasing to +£98.62 million by 2040 and +£171.59 million by 2045. Deficit/surplus comparison expenditure has been converted into floorspace projections in Table 11 in Appendix 3, as summarised in Table 2.3.

Table 2.3 Comparison goods floorspace capacity (sq.m net) – (cumulative)

Area	2025	2030	2035	2040	2045
Zone 1 - Canterbury	771	3,524	5,842	8,891	13,026
Zone 5 - Herne Bay	-903	-736	-594	-408	-156
Zone 6 - Whitstable	-222	-79	41	200	414
Other rural zones	-6	-2	1	6	12
<b>Total</b>	<b>-360</b>	<b>2,707</b>	<b>5,290</b>	<b>8,688</b>	<b>13,295</b>

Source: Table 10, Appendix 3

- 2.42 A comparison goods expenditure deficit is projected up to 2025, which suggests an over-supply of retail floorspace, resulting in a negative floorspace projection. However, the small surplus expenditure by 2030 indicates that there is some capacity for additional comparison goods floorspace in the authority area of 2,707 sq.m net, over and above commitments. Surplus expenditure up to 2045 indicates that there is capacity for additional comparison goods floorspace of 13,295 sq.m net. The long term projections to 2045 should be treated with caution due to the inherent uncertainties described earlier. The priority for the emerging Local Plan should seek to accommodate retail floorspace projections over a 10 year period or up to 2035.
- 2.43 The 2040 projection in the CRLS 2020 was much lower than the updated projection (8,688 sq.m net), suggesting a small over-supply (202 sq.m net) of floorspace by 2040. The higher population growth scenario adopted in the CRLS suggested a requirement for 2,067 sq.m net by 2040, still lower than the updated projection (8,688 sq.m net). This difference is primarily due to Experian's latest sales density growth projections for comparison goods sales floorspace, which are lower than previous forecasts, therefore less expenditure growth is now expected to be absorbed by growth in sales densities.

## 3.0 Commercial leisure uses

### Introduction

- 3.1 This section updates the needs assessment for commercial leisure use including, cinema/multiplex, tenpin bowling, bingo, nightclubs and private health/fitness clubs, restaurants, cafés, pubs and bars. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this update.

### Leisure and cultural expenditure

- 3.2 Experian local expenditure data for the study area and projections indicates the resident population generated £382.3 million in 2022 (an average of £319 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £28.6 million;
- live entertainment i.e., theatre/concerts/shows £59.3 million;
- museums, theme parks, houses and gardens £28.6 million;
- admissions to clubs, dances, discos, bingo £34.3 million;
- other miscellaneous entertainment £62.9 million;
- subscriptions to sports and social clubs £92.0 million; and
- leisure class fees £76.6 million.

- 3.3 Not all leisure spend from residents in the study area will be spent in Canterbury City. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 3.1. The participation and retention rates varies significantly for each activity. It should be noted that the household survey did not include all leisure activities but most of the main activities are included in Table 3.1.

Table 3.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% households participating	% trips attracted to Canterbury district
Cinema	56.7	8.8
Theatre	42.5	52.0
Nightclub	4.9	27.3
Bingo	8.6	4.4
Casinos	3.5	0.0
Health/fitness club	23.5	16.0
Tenpin bowling	18.5	10.0
Museum/art gallery	26.8	9.5
Events/festivals	23.9	17.9
Soft play/trampoline centre	15.7	11.4
Escape rooms	5.7	33.3

Source: NEMS Household Survey – May 2019

- 3.4 Taking account these retention rates and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Canterbury local authority areas attracts about 20% of resident's total leisure expenditure in the study area. Leisure expenditure attracted to Canterbury local authority area in 2022 is about £76.5 million (20% of £382.3 million).

- 3.5 Experian local expenditure data for the study area and projections indicates the resident population generated £1,600 million in 2022 (an average of £1,337 person) on food and beverage at restaurants, cafés and bars. The household survey results have been used to estimate the household participation rates and the retention for food/beverage trips within the study area, as shown in Table 3.2.

Table 3.2 Food and beverage participation and trip retention (% of households in the study area)

Leisure activity	% households participating	% trips attracted to Canterbury LA
Restaurants	72.2	25.6
Cafés	54.7	22.6
Pubs/bars	48.5	16.7

Source: NEMS Household Survey – May 2019

- 3.6 Taking account these retention rates and the split of food/beverage expenditure shown above, it is reasonable to assume Canterbury local authority areas attracts about 22% of resident's total food/beverage expenditure in the study area. Food/beverage expenditure attracted to Canterbury local authority area in 2022 is about £352 million (22% of £1,600 million).

### **Leisure, food/beverage floorspace capacity**

- 3.7 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 8.6% between 2022 to 2030, or by 24.2% between 2022 to 2045. With population growth (5.1% by 2030 or 12.3% by 2045) expenditure on these leisure/cultural activities attracted to Canterbury local authority area should increase from £76.5 million to £87.3 million by 2030 and then to £106.7 million by 2045, an additional £10.8 million by 2030 or £30.2 million by 2045.
- 3.8 Food/beverage expenditure attracted to Canterbury local authority area should increase from £352 million to £401.8 million by 2030 and then to £491 million by 2045, an additional £49.8 million by 2030 or £139 million by 2045.
- 3.9 Experian does not provide projections for leisure or food/beverage sales densities. Some expenditure growth will be absorbed during the period of recovery required in this sector following the Covid-19 pandemic. An average sales density growth rate of 1% per annum has been adopted.
- 3.10 Allowing for increase sales densities (1% per annum) residual expenditure growth to support new leisure floorspace is estimated to be £4.5 million at 2030 increasing to £10.5 million at 2045. This additional expenditure could support about 2,100 sq.m of new commercial leisure and cultural floorspace by 2030, based on £2,000 per sq.m (inflated at 1% per annum from 2022), increasing to 4,200 sq.m by 2045, as shown in Table 3.3.
- 3.11 Also allowing for increase sales densities (1% per annum) residual expenditure growth to support new food/beverage floorspace is estimated to be £20.6 million at 2030 increasing to £48.5 million by 2045. This additional expenditure could support about 4,000 sq.m of new food/beverage floorspace by 2030, based on £5,000 per sq.m (inflated at 1% per annum from 2022), increasing to 7,700 sq.m by 2045, as shown in Table 3.3.

Table 3.2 Commercial leisure and food/beverage floorspace capacity (sq.m) - cumulative

	Commercial leisure	Food/beverage
By 2025	900	1,600
By 2030	2,100	3,800
By 2035	2,800	5,200
By 2040	3,500	6,500
By 2045	4,200	7,700

Source: Experian expenditure projections and Lichfields' estimates.

- 3.12 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

### Cinemas

- 3.13 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).
- 3.14 The Cinema Advertising Association identifies 843 cinema facilities with 4,596 screens. Lichfields' national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per screen per annum or 220 trips per seat per annum.
- 3.15 Cinema provision in Canterbury local authority area is 8 screens with 1,535 seats, as follows:
- Curzon, Canterbury (3 screens / 220 seats);
  - Gulbenkian Theatre, Canterbury (1 screen / 300 seats);
  - Odeon, Canterbury (2 screens / 783 seats);
  - Kavanagh, Herne Bay (2 screens / 232 seats);
- 3.16 British Film Institute information suggest the participation rate for visiting cinemas is 52% for adults in the UK. The 2019 household survey results suggested a slightly higher participation of 56.7% for household in the study area. These figures suggest a slightly higher average of 2.8 trips per person could be adopted in the Canterbury study area. The population within the Canterbury study area in 2022 (1,196,848 people) would generate around 3.11 million cinema trips per annum, based on the national average visitation rate (2.6 trips per annum) or 3.35 million trips based on 2.8 trips per person. The household survey results suggest Canterbury local authority area attracts about 8.8% of cinema trips i.e., about 295,000 trips based on the higher trip rate of 2.8 trips per person. Population growth to 2045 suggests the number of trips attracted to Canterbury could increase to 331,000.



- 3.17 Experian's local expenditure data indicates the study area generates £28.6 million on cinema trips. This expenditure estimate appears to be consistent with the 3.35 million cinema trip estimate i.e., an average of about £8.50 per person each trip.
- 3.18 Adopting the national average population per cinema screen (38,000 trips per screen), implies the projected 331,000 trips attracted to Canterbury at 2045 generates demand for nearly 9 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 331,000 trips could support 1,505 seats, compared with the existing provision of 1,535 seats.
- 3.19 These projections suggest no demand for additional cinema screens or seats in Canterbury. The household survey results suggest Canterbury's market share of cinema trips (8.8%) is relatively low when compared with other leisure activities, as shown in Table 3.1. However, a new 5 screen Curzon cinema is nearing completion at Canterbury Riverside. This commitment and the projections above indicate there is no residual capacity for further cinema provision in Canterbury. Furthermore, the longer term impact of the Covid-19 on the number of cinema trips may reduce this capacity.

### **Theatres, nightclubs, live music and other cultural activities**

- 3.20 The 2019 household survey results indicate 42.5% of respondents in the study area visit theatres, 4.9% visit nightclubs and 23.9 visit events/festivals.
- 3.21 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance is 545.
- 3.22 The household survey results indicate the participation rate for theatres is reasonably high (42.5%). Experian's local expenditure data indicates the study area generates £59.3 million on live theatre, concerts and shows. Canterbury's market share of this expenditure should be about 52% (£30.8 million) based on the household survey results. Assuming the national average ticket revenue per venue (£5.7 million) these figures suggest there is capacity for five venues in the Canterbury authority area. However, there is already a good provision of theatres. Named theatre destinations by respondents to the 2019 household survey included the Marlowe Theatre and the Gulbenkian in Canterbury, Herne Bay Little Theatre and the Playhouse Theatre in Whitstable. Existing provision appears to be sufficient to meet demand.
- 3.23 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 3.24 The household survey results indicate the participation rate for nightclubs/live music venues is relatively low (4.9%) and 27.3% participating residents in the study area visit nightclubs/live music venues in Canterbury. Based on the low participation rate and access to facilities elsewhere in the study area, there is no qualitative or quantitative need to provide nightclub/live music facilities in Canterbury.
- 3.25 The 2019 household survey results indicate 26.8% of respondents in the study area visit museums and art galleries. Experian's local expenditure data indicates the study area generates £28.6 million on museums, theme parks, houses and garden, which will also include visits to exhibitions. Canterbury's market share of this expenditure is likely to be around 9.5% based on the household survey results (£2.7 million). Population growth and expenditure growth (+39.5%

by 2045) could increase this expenditure to £3.8 million. This £1.1 million increase in expenditure could support additional facilities in Canterbury.

- 3.26 There may be potential quantitative capacity for additional cultural facilities in Canterbury. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

### **Health and fitness clubs**

- 3.27 Canterbury City Council's Indoor Sports Facilities Needs Assessment (October 2020) sets out a detailed analysis of the need for sports provision. The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.

- 3.28 Section 7 of the Indoor Sports Facilities Needs Assessment (ISFNA) assesses the need for health and fitness suites.

- 3.29 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.

- 3.30 The Sport England/Active Places data indicates that there are 23 registered health and fitness facilities in Canterbury authority area, with 1,505 fitness stations. The 23 facilities are shown in Table 3.3. The Indoor Sports Facilities Needs Assessment (October 2020) identified 21 health/fitness suites with 1,141 stations, which also appears to be based on Sport England data.

- 3.31 The ISFNA included the Pure Gym at Canterbury Riverside and Snap Fitness at Herne Bay as planned facilities at the time of this study.

Table 3.3 Health and Fitness Clubs (Sport England/Active Places Data, 2021)

Name	Type	No. Fitness Stations	Identified in ISFNA 2022
Pure Gym, Canterbury Sturry Road	Registered Membership use	220	Yes
Pure Gym, Canterbury Riverside	Registered Membership use	170	No
Snap Fitness, Herne Bay	Registered Membership use	150	No
University of Kent	Registered Membership use	144	Yes
Canterbury Academy Campus	Pay and Play	120	Yes
DW Fitness First, Canterbury	Registered Membership use	105	Yes
Kingsmead Leisure Centre	Pay and Play	80	Yes
Christ Church Sports Centre	Private Use	70	Yes
Hérons Leisure Centre	Pay and Play	55	Yes
Flex Appeal, Whitstable	Registered Membership use	54	Yes
Ladies of Leisure Gym, Canterbury	Registered Membership use	51	Yes
Urban Fitness	Registered Membership use	50	Yes
Canterbury College	Registered Membership use	37	Yes
Energie Fitness (canterbury)	Registered Membership use	35	Yes
The Kings School Recreation Centre	Registered Membership use	35	Yes
Whitstable Sports Centre	Pay and Play	30	Yes
Whitstable Swimming Pool	Registered Membership use	25	Yes
Herne Bay High School	Private Use	22	No
Whitstable Waterfront Club	Registered Membership use	14	Yes
St Anselms R.C School	Private Use	12	Yes
Simon Langton Grammar School	Sports Club/Community Assoc.	10	Yes
Whitstable Rugby Club	Sports Club/Community Assoc.	10	Yes
Broome Park Golf Club	Private Use	6	Yes
<b>Total</b>		<b>1,505</b>	

Source: Sport England Active Places

- 3.32 The base year study area population is 1,196,848 people in 2022. The household survey results suggest the health and fitness club participation rate is 23.5% of households. Canterbury's market share of health and fitness trips is about 16%, suggesting a health and fitness catchment population of about 191,000 in 2022. This catchment population estimate indicates that Canterbury has 7.9 fitness stations per 1,000 people (1,505 registered stations in total).
- 3.33 The South East region has 1,099 Sport England registered health and fitness facilities with 57,457 fitness stations (average of 52 stations per facility). This existing provision equates to about 6.2 registered fitness stations per 1,000 people in the South East region. Canterbury's health and fitness catchment population has a slightly higher provision of fitness registered stations (7.9 per 1,000 people) than the South East average (6.2 stations), suggesting higher participation rates and/or a relative over-supply of fitness stations.
- 3.34 The slightly higher provision in Canterbury City may be due to the demographic profile and higher participation rates. However, if Canterbury's provision remains at 7.9 stations per 1,000 people then the demand for fitness stations could increase from 1,505 to 1,699 stations by 2045, due to population growth, an increase of +194 station or about 4 medium sized facilities.
- 3.35 The ISFNA adopted a difference methodology based the projected adult population (16 years and over), the UK average membership rate (15% projected to increase to 16%) with each member visiting 1.75 times a week. The adult population was projected to be 167,636 at 2041, 26,822 members. generating 46,938 visits. The ISFNA assumed that 65% of member visits (30,510 visits or 782 visits per week) were at peak times. The ISFNA applies a two thirds

comfort factor at peak times, i.e. only two thirds of fitness stations are used at peak times. Based on this approach the ISFNA projected a need for 1,173 fitness stations in Canterbury district by 2041, which is below the existing/planned supply.

### **Tenpin bowling and other indoor leisure innovations**

- 3.36 Across the country freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing and indoor golf etc. The innovations are likely to continue and a flexible approach is required to respond to arising opportunities.
- 3.37 The household survey results suggested the tenpin bowling participation rate was about 18.5% of households MFA Bowl in Whitstable (10 lanes) was the only facility mentioned in the household, with a market share of 10% in the study area. There are four lanes at the Canterbury Bowling Alley, Wincheap Industrial Estate.
- 3.38 The household survey market share suggests a tenpin bowling catchment population of about 120,000 in 2022. This base year catchment area population could theoretically support 10 tenpin bowling lanes, based on one lane per 12,000 people (national average). Population growth within the study area between 2022 and 2045 would increase the theoretical capacity to 14 lanes. This projection is consistent with the existing supply of lanes in Canterbury.
- 3.39 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 3.40 The 2019 household survey results indicate 15.7% of respondents in the study area visit soft play/trampoline parks and Canterbury's market share of trips is only 11.4%. Trampoline and soft play centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 3.41 Flipout at Ashford is the nearest major trampoline facility, although there are soft play facilities in Canterbury. This sector is still relatively new and there may be potential for continued growth. The strategy for Canterbury should be flexible to respond to any emerging demand for trampoline centres.
- 3.42 The number of escape rooms in the UK grew rapidly in the last 4 years before the Covid pandemic, increasing from about 600 at the end of 2016 to over 1,500 by 2019. The market is fragmented and is still relatively new. The 2019 household survey results indicate only 5.7% of respondents in the study area visit escape rooms and Canterbury's market share of trips is about 30%. There are 11 escape rooms available in Canterbury including the Crime and Punishment Lab, Magic Portal, Alien Attack, Jail Escape, Vice Versa, Operation Mindfall, Kidnapped and the Haunting. It is not clear whether this sector is approaching saturation point, therefore a flexible strategy is required.

### **Bingo, games of chance and gambling**

- 3.43 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups.

The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

3.44 The Gambling Commission indicates there were 601 bingo facilities in Great Britain (August 2020) and 131 casinos. The number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The latest figures equate to approximately one bingo facility per 110,000 people, and one casino per 480,000 people.

3.45 Population in the Canterbury study area (1,196,848 people in 2022) is theoretically sufficient to support at 10 bingo facilities and two casino, based on the national averages. However, not all facilities should be provided in Canterbury authority area. Connaught Bingo and Social Club in Herne Bay was the main bingo destination in Canterbury authority area mentioned by respondents to the household survey. There are no major bingo facilities in Canterbury City. There is theoretical scope for a bingo facility in Canterbury and possibly a casino, although the national decline in the number of bingo premises and increase on-line gambling suggest there may limited operator demand to open new facilities of this kind.

### **Conclusions on commercial leisure and other town centre uses**

3.46 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g., museum, gallery/exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 10-15 years. However, it is important that new emerging sectors can be accommodated.

3.47 Residual food/beverage expenditure growth could support new floorspace 7,700 sq.m by 2045.

3.48 Residual leisure expenditure growth up to 2045 could support new leisure floorspace of 4,200 sq.m. This additional floorspace could for example include:

- 4 medium sized health and fitness facilities;
- a bingo club/casino in Canterbury City.

3.49 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

## 4.0 Implications for emerging policy

### Introduction

- 4.1 The National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability. The emerging Local Plan should seek to accommodate retail floorspace projections at least up to 2030 and probably 2035.
- 4.2 The latest NPPF (as amended July 2021) indicates planning policies should (para. 86):
- define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
  - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
  - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
  - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
  - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
  - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 4.3 In relation to town centres, the latest NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years.
- 4.4 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to respond to ‘rapid changes in the retail and leisure industries’. Accordingly, planning policies should clarify ‘the range of uses permitted in such locations, as part of a positive strategy for the future of each centre’.
- 4.5 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings
- 4.6 The updated projections confirm there is a need for town centres to maintain their primary retail function, whilst increasing their diversity with a range of complementary uses. The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Online shopping is

likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

- 4.7 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 4.8 This section reviews the previous policy recommendations taking account the latest NPPF and other changes.

## Floorspace capacity projections

- 4.9 Tables 4.1, 4.2 and 4.3 summarise the retail floorspace projections for convenience and comparison goods retail by broad location up to 2030, 2035 and 2040. The distribution of floorspace is based on the existing market shares and expenditure patterns. The floorspace projections are over and above existing commitments. Table 4.4 summarises the food/beverage and leisure/cultural floorspace projections.

Table 4.1 Summary of retail floorspace projections up to 2030 (sq.m net)

	Convenience	Comparison	Total
Zone 1 - Canterbury	-369	3,524	3,155
Zone 5 - Herne Bay	-40	-736	-776
Zone 6 - Whitstable	-52	-79	-131
Other rural zones	-161	-2	-163
<b>Total</b>	<b>-623</b>	<b>2,707</b>	<b>2,084</b>

Table 4.2 Summary of retail floorspace projections up to 2035 (sq.m net)

	Convenience	Comparison	Total
Zone 1 - Canterbury	173	5,842	6,015
Zone 5 - Herne Bay	161	-594	-433
Zone 6 - Whitstable	210	41	251
Other rural zones	-130	1	-129
<b>Total</b>	<b>414</b>	<b>5,290</b>	<b>5,704</b>

Table 4.3 Summary of retail floorspace projections up to 2045 (sq.m net)

	Convenience	Comparison	Total
Zone 1 - Canterbury	1,272	13,026	14,298
Zone 5 - Herne Bay	569	-156	413
Zone 6 - Whitstable	742	414	1,156
Other rural zones	-65	12	-53
<b>Total</b>	<b>2,517</b>	<b>13,295</b>	<b>15,814</b>

- 4.10 It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the latest NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The

need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. The global retail capacity at 2030 is only 2,084 sq.m net, which will increase to 5,704 sq.m net by 2035.

4.11 These updated figures indicates the projected capacity for retail floorspace has increased marginally since the CRLS 2020 was prepared. The revised projections suggest a mix of comparison and convenience goods retail and food/beverage floorspace is required.

4.12 In addition to retail floorspace, leisure expenditure growth could support about 2,100 sq.m gross of new commercial leisure/cultural floorspace by 2030, increasing to 4,200 sq.m gross by 2045. Food/beverage expenditure growth to support about 4,000 sq.m gross of new floorspace by 2030, increasing to 7,700 sq.m gross by 2045. The CRLS 2020 did not quantify potential floorspace capacity for leisure and food/beverage floorspace.

Table 4.4 Summary of food/beverage and leisure projections (sq.m gross) - cumulative

	Leisure	Food/beverage	Total
By 2030	2,100	3,800	<b>5,900</b>
By 2035	2,800	5,200	<b>8,000</b>
By 2040	3,500	6,500	<b>10,000</b>
By 2045	4,200	7,700	<b>11,900</b>

4.13 The CRLS 2020 identified limited opportunities for in centre retail and leisure development. However, the existing stock of premises should help to accommodate some of the projected growth, particularly up to 2030. The retail capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace should help to accommodate residual future growth.

4.14 The CRLS suggested the number of vacant units in Canterbury city centre was 44 units (9,100 sq.m gross) in October 2018. The vacant rate was 9.4%, lower than the national average at that time (13.7%). The shop vacancy rate was lower in Herne Bay (7%) and Whitstable (2%).

4.15 If up to half of the vacant floorspace in Canterbury city centre can be reoccupied, then vacant space could accommodate about 3,400 sq.m net (4,500 sq.m gross). The 2035 retail floorspace projection for the Canterbury city would reduce from about 6,000 sq.m net to 2,600 sq.m net. The application of shop frontage policies could help encourage the reoccupation of vacant retail space, reducing the need to allocate sites to accommodate residual floorspace capacity.

4.16 These projections and vacant floorspace estimates suggest there is no pressing need to identify major new allocations for retail development up to 2035, although there is likely to be some residual capacity that could be accommodated in small scale ‘windfall’ developments. The short term projections to 2025 suggest there is likely to be limited demand to reoccupy vacant retail floorspace. However, the need to retain retail floorspace in the medium and longer term (up to 2030, 2035, 2040 and 2045) needs to be considered. Emerging LPR policy should indicate the need for retail floorspace can be accommodated through the re-occupation of vacant floorspace and small scale developments.

4.17 The projected need for food/beverage and leisure floorspace across the District is about 8,000 sq.m gross by 2035. Some of this projection could be accommodated in reoccupied vacant floorspace or small scale developments. Allowing for reoccupied vacant floorspace in Canterbury city centre (about 4,500 sq.m gross) there could be combined residual capacity for about 11,000 sq.m gross of retail, food/beverage and commercial leisure floorspace by 2035.



- 4.18 Some new retail, food/beverage and leisure floorspace may be required to support the day to day needs of any strategic housing allocations. These facilities should be commensurate with the number of new dwellings proposed and the scale of development must have an acceptable impact on town centres. These strategic housing allocations could meet much of the residual floorspace capacity, over and above the reoccupation of vacant floorspace as outlined above or small scale windfall developments within town centres.
- 4.19 Despite the recent changes to the UCO, the LPR can still refer to separate retail floorspace projections, which do not need to be merged with other uses in Class E, such as office and leisure uses. Historically, development plans have included separate floorspace projections for comparison and convenience goods retail although they both fell within Class A1, along with other non-retail services. Under the old system, there were permitted development rights for all food and beverage uses to change to Class A1. In a similar way, retail and restaurant/café uses now fall into one new Class E, whilst pubs/bars and takeaways are Sui Generis with no permitted changes.
- 4.20 The Council can still impose conditions on new development that restrict changes within the new Class E, in the same way comparison, convenience goods retail floorspace and the sale of specific types of goods have been controlled via conditions for many years. The floorspace projections in this study and retail impact assessments should help to determine when these types of conditions are necessary and appropriate.

### **Impact and sequential tests**

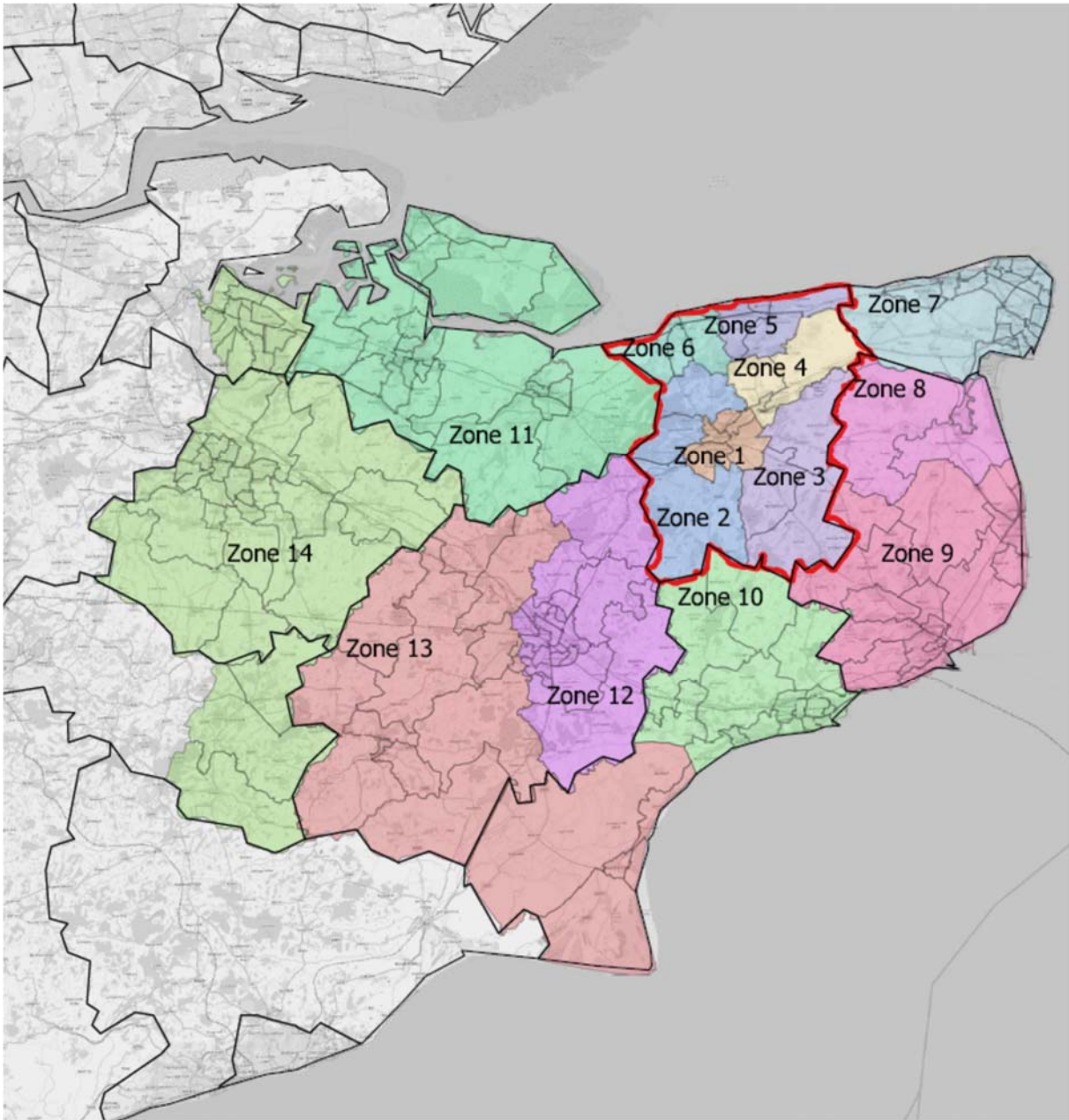
- 4.21 The NPPF (paragraph 90) states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:
- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
  - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 4.22 The NPPF (paragraph 87) indicates local planning authorities should apply a sequential test for main town centre uses outside of designated centres. The impact test should only apply to retail and leisure development outside of centres.
- 4.23 As indicated in the CRLS 2020, the NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate blanket threshold across the Canterbury authority area. This scale of development would still represent a significant proportion of the overall retail projections for parts of the authority. The recommended lower impact threshold of 500 sq.m gross remains appropriate.

### **Town centre boundary and primary shopping areas**

- 4.24 The LPR should define town centre boundaries on the proposals map in order to apply the sequential test. As recommended in the CRLS 2020, the extent or need for a primary shopping area for Canterbury city centre should be considered by the Council following the UCO changes. The centre boundaries should provide sufficient clarification in relation to the need for an impact and sequential assessment.

- 4.25 Current and future market trends, the relatively low retail floorspace capacity projections, changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centre should be adopted.

# **Appendix 1 Study area and population**



**Table 1 - Study area population projections**

Zone	2020	2022	2025	2030	2035	2040	2045
1	52,886	53,100	54,541	57,034	58,532	59,424	60,330
2	18,866	18,910	19,157	19,609	19,826	19,932	20,039
3	8,265	8,249	8,346	8,537	8,771	8,948	9,129
4	12,446	12,461	12,540	12,800	12,972	13,070	13,169
5	38,745	38,770	39,090	39,930	40,407	40,587	40,768
6	35,554	35,593	35,949	36,453	36,674	36,604	36,534
7	141,458	142,361	144,509	147,609	150,399	153,187	156,027
8	14,038	14,264	14,677	15,293	15,767	16,178	16,600
9	104,476	106,100	109,155	113,552	117,349	120,867	124,490
10	90,205	91,279	93,149	95,957	98,623	101,258	103,963
11	151,015	152,924	157,016	162,669	167,577	172,263	177,080
12	86,512	89,103	91,863	95,709	99,095	102,529	106,082
13	67,621	69,088	70,683	72,929	74,737	76,196	77,683
14	358,012	364,646	370,903	379,443	386,997	394,662	402,479
<b>Total</b>	<b>1,180,099</b>	<b>1,196,848</b>	<b>1,221,578</b>	<b>1,257,524</b>	<b>1,287,726</b>	<b>1,315,705</b>	<b>1,344,372</b>

Sources: Experian population projections - 2020. Figures between 2040 to 2045 extrapolated.



## **Appendix 2 Convenience goods capacity**

**Table 1 - Convenience goods expenditure per person per annum (£)**

Zone	2020	2022	2025	2030	2035	2040	2045
1	2,337	2,198	2,186	2,183	2,187	2,191	2,202
2	2,825	2,657	2,643	2,639	2,644	2,648	2,662
3	2,958	2,783	2,768	2,764	2,768	2,773	2,787
4	2,652	2,495	2,481	2,477	2,482	2,486	2,498
5	2,586	2,433	2,420	2,416	2,420	2,425	2,437
6	2,731	2,569	2,555	2,551	2,556	2,560	2,573
7	2,574	2,422	2,408	2,405	2,409	2,413	2,425
8	2,869	2,699	2,684	2,680	2,685	2,690	2,703
9	2,645	2,488	2,475	2,471	2,475	2,480	2,492
10	2,634	2,478	2,464	2,460	2,465	2,469	2,481
11	2,577	2,424	2,411	2,407	2,412	2,416	2,428
12	2,556	2,405	2,391	2,388	2,392	2,396	2,408
13	2,807	2,640	2,626	2,622	2,627	2,631	2,645
14	2,602	2,447	2,434	2,430	2,435	2,439	2,451

Sources:

*Experian Local Expenditure 2020 (2020 prices)*

*Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a*

*Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5*



**Table 2 - Total convenience goods expenditure (£m)**

Zone	2020	2022	2025	2030	2035	2040	2045
1	123.57	116.72	119.23	124.50	128.00	130.17	132.82
2	53.29	50.25	50.63	51.75	52.41	52.78	53.33
3	24.45	22.96	23.10	23.59	24.28	24.82	25.44
4	33.00	31.08	31.11	31.71	32.19	32.49	32.90
5	100.21	94.33	94.59	96.48	97.81	98.41	99.35
6	97.10	91.45	91.85	93.01	93.74	93.72	94.01
7	364.12	344.73	348.01	354.96	362.31	369.67	378.41
8	40.28	38.50	39.40	40.99	42.34	43.52	44.88
9	276.34	264.01	270.11	280.59	290.48	299.72	310.25
10	237.57	226.15	229.52	236.09	243.08	250.01	257.98
11	389.15	370.72	378.54	391.61	404.14	416.17	429.95
12	221.13	214.26	219.68	228.55	237.05	245.70	255.48
13	189.80	182.42	185.61	191.23	196.32	200.50	205.44
14	931.37	892.42	902.73	922.19	942.21	962.55	986.54
<b>Total</b>	<b>3,081.39</b>	<b>2,940.01</b>	<b>2,984.11</b>	<b>3,067.25</b>	<b>3,146.35</b>	<b>3,220.24</b>	<b>3,306.78</b>

Source: Tables 1, Appendix 1 and Table 1, Appendix 2

**Table 3 - Base year convenience goods study area market shares (%)**

	Study Area Market Share
Zone 1 - Canterbury	8.25%
Zone 2 - Canterbury West	0.17%
Zone 3 - Canterbury South East	0.13%
Zone 4 - Canterbury North East	0.18%
Zone 5 - Herne Bay	3.06%
Zone 6 - Whitstable	3.99%
<b>Canterbury sub-total</b>	<b>15.78%</b>
Rest of study area (Zones 7 to 14)	81.25%
Outside study area	2.97%
<b>TOTAL</b>	<b>100.00%</b>

Source: *Canterbury Retail and Leisure Study (July 2020) - Table 7, Appendix 7.*

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**Table 4 - Base year 2022 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	242.55
Zone 2 - Canterbury West	5.00
Zone 3 - Canterbury South East	3.82
Zone 4 - Canterbury North East	5.29
Zone 5 - Herne Bay	89.96
Zone 6 - Whitstable	117.31
<b>Canterbury sub-total</b>	<b>463.93</b>
Rest of study area (Zones 7 to 14)	2,388.76
Outside study area	87.32
<b>TOTAL</b>	<b>2,940.01</b>

Source: Tables 2 and 3

**Table 5 - Future 2025 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	246.19
Zone 2 - Canterbury West	5.07
Zone 3 - Canterbury South East	3.88
Zone 4 - Canterbury North East	5.37
Zone 5 - Herne Bay	91.31
Zone 6 - Whitstable	119.07
<b>Canterbury sub-total</b>	<b>470.89</b>
Rest of study area (Zones 7 to 14)	2,424.59
Outside study area	88.63
<b>TOTAL</b>	<b>2,984.11</b>

Source: Tables 2 and 3

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**Table 6 - Future 2030 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	253.05
Zone 2 - Canterbury West	5.21
Zone 3 - Canterbury South East	3.99
Zone 4 - Canterbury North East	5.52
Zone 5 - Herne Bay	93.86
Zone 6 - Whitstable	122.38
<b>Canterbury sub-total</b>	<b>484.01</b>
Rest of study area (Zones 7 to 14)	2,492.14
Outside study area	91.10
<b>TOTAL</b>	<b>3,067.25</b>

Source: Tables 2 and 3

**Table 7 - Future 2035 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	259.57
Zone 2 - Canterbury West	5.35
Zone 3 - Canterbury South East	4.09
Zone 4 - Canterbury North East	5.66
Zone 5 - Herne Bay	96.28
Zone 6 - Whitstable	125.54
<b>Canterbury sub-total</b>	<b>496.49</b>
Rest of study area (Zones 7 to 14)	2,556.41
Outside study area	93.45
<b>TOTAL</b>	<b>3,146.35</b>

Source: Tables 2 and 3

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**Table 8 - Future 2040 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	265.67
Zone 2 - Canterbury West	5.47
Zone 3 - Canterbury South East	4.19
Zone 4 - Canterbury North East	5.80
Zone 5 - Herne Bay	98.54
Zone 6 - Whitstable	128.49
<b>Canterbury sub-total</b>	<b>508.15</b>
Rest of study area (Zones 7 to 14)	2,616.45
Outside study area	95.64
<b>TOTAL</b>	<b>3,220.24</b>

Source: Tables 2 and 3

**Table 9 - Future 2045 convenience goods turnover (£M)**

	Turnover £M
Zone 1 - Canterbury	272.81
Zone 2 - Canterbury West	5.62
Zone 3 - Canterbury South East	4.30
Zone 4 - Canterbury North East	5.95
Zone 5 - Herne Bay	101.19
Zone 6 - Whitstable	131.94
<b>Canterbury sub-total</b>	<b>521.81</b>
Rest of study area (Zones 7 to 14)	2,686.76
Outside study area	98.21
<b>TOTAL</b>	<b>3,306.78</b>

Source: Tables 2 and 3

**Table 10 - Convenience goods commitments turnover (2020 prices)**

	Sales floorspace (sq.m net)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
<b>Zone 1</b>				
Canterbury Riverside	287	287	£8,000	£2.30
Land off Cockerling Road Thannington	350	175	£4,000	£0.70
<b>Zone 4</b>				
Land South of Island Road, Westbere	222	222	£8,000	£1.78



**Table 11 - Summary of convenience goods turnovers 2022 to 2040 (£M)**

	2022	2025	2030	2035	2040	2045
<b>Available expenditure</b>						
Zone 1 - Canterbury	242.55	246.19	253.05	259.57	265.67	272.81
Zone 2 - Canterbury West	5.00	5.07	5.21	5.35	5.47	5.62
Zone 3 - Canterbury South East	3.82	3.88	3.99	4.09	4.19	4.30
Zone 4 - Canterbury North East	5.29	5.37	5.52	5.66	5.80	5.95
Zone 5 - Herne Bay	89.96	91.31	93.86	96.28	98.54	101.19
Zone 6 - Whitstable	117.31	119.07	122.38	125.54	128.49	131.94
<b>Total</b>	<b>463.93</b>	<b>470.89</b>	<b>484.01</b>	<b>496.49</b>	<b>508.15</b>	<b>521.81</b>
<b>Turnover of existing facilities</b>						
Zone 1 - Canterbury	242.55	253.34	254.35	254.35	254.35	254.35
Zone 2 - Canterbury West	5.00	5.22	5.24	5.24	5.24	5.24
Zone 3 - Canterbury South East	3.82	3.99	4.01	4.01	4.01	4.01
Zone 4 - Canterbury North East	5.29	5.53	5.55	5.55	5.55	5.55
Zone 5 - Herne Bay	89.96	93.97	94.34	94.34	94.34	94.34
Zone 6 - Whitstable	117.31	122.52	123.01	123.01	123.01	123.01
<b>Total</b>	<b>463.93</b>	<b>484.57</b>	<b>486.51</b>	<b>486.51</b>	<b>486.51</b>	<b>486.51</b>
<b>Turnover commitments/completions</b>						
Zone 1 - Canterbury	3.00	3.13	3.14	3.14	3.14	3.14
Zone 2 - Canterbury West	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3 - Canterbury South East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4 - Canterbury North East	1.78	1.85	1.86	1.86	1.86	1.86
Zone 5 - Herne Bay	0.00	0.00	0.00	0.00	0.00	0.00
Zone 6 - Whitstable	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>4.77</b>	<b>4.98</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>	<b>5.00</b>
<b>Surplus/deficit expenditure £M</b>						
Zone 1 - Canterbury	n/a	-10.28	-4.45	2.08	8.17	15.31
Zone 2 - Canterbury West	n/a	-0.15	-0.03	0.11	0.23	0.38
Zone 3 - Canterbury South East	n/a	-0.11	-0.02	0.08	0.18	0.29
Zone 4 - Canterbury North East	n/a	-2.01	-1.89	-1.75	-1.62	-1.46
Zone 5 - Herne Bay	n/a	-2.65	-0.48	1.94	4.20	6.85
Zone 6 - Whitstable	n/a	-3.46	-0.63	2.52	5.47	8.93
<b>Total</b>	<b>n/a</b>	<b>-18.66</b>	<b>-7.50</b>	<b>4.98</b>	<b>16.64</b>	<b>30.30</b>

Source: Tables 4 to 10

**Table 12 - Convenience goods floorspace capacity**

	2025	2030	2035	2040	2045
<b>Turnover density new floorspace (£ per sq.m)</b>	£12,000	£12,036	£12,036	£12,036	£12,036
<b>Sales floorspace projection (sq.m net)</b>					
Zone 1 - Canterbury	-857	-369	173	679	1,272
Zone 2 - Canterbury West	-12	-2	9	19	32
Zone 3 - Canterbury South East	-9	-2	7	15	24
Zone 4 - Canterbury North East	-168	-157	-145	-134	-121
Zone 5 - Herne Bay	-221	-40	161	349	569
Zone 6 - Whitstable	-288	-52	210	455	742
	<b>-1,555</b>	<b>-623</b>	<b>414</b>	<b>1,383</b>	<b>2,517</b>

Source: Table 11

## **Appendix 3 Comparison goods capacity**

**Table 1 - Comparison goods expenditure per person per annum (£)**

Zone	2020	2022	2025	2030	2035	2040	2045
1	2,663	2,834	2,989	3,336	3,785	4,329	4,994
2	3,581	3,811	4,020	4,487	5,089	5,822	6,716
3	3,698	3,936	4,152	4,634	5,257	6,013	6,937
4	3,241	3,449	3,638	4,061	4,606	5,269	6,078
5	2,992	3,184	3,359	3,748	4,252	4,864	5,611
6	3,228	3,435	3,624	4,045	4,588	5,248	6,055
7	2,804	2,984	3,148	3,513	3,985	4,559	5,259
8	3,457	3,678	3,881	4,331	4,913	5,620	6,483
9	2,986	3,177	3,352	3,741	4,244	4,854	5,600
10	3,007	3,199	3,375	3,767	4,273	4,888	5,639
11	2,979	3,170	3,344	3,733	4,234	4,843	5,587
12	2,985	3,176	3,351	3,740	4,242	4,853	5,598
13	3,347	3,562	3,758	4,194	4,757	5,442	6,278
14	3,011	3,204	3,380	3,773	4,279	4,895	5,647

Sources:

*Experian Local Expenditure 2020 (2020 prices)*

*Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a*

*Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5*

**Table 2 - Total comparison goods expenditure (£m)**

Zone	2020	2022	2025	2030	2035	2040	2045
1	140.82	150.47	163.05	190.28	221.52	257.24	301.29
2	67.56	72.06	77.01	87.98	100.90	116.03	134.58
3	30.57	32.47	34.65	39.56	46.11	53.80	63.32
4	40.34	42.98	45.63	51.98	59.75	68.86	80.04
5	115.91	123.43	131.29	149.67	171.81	197.40	228.74
6	114.78	122.28	130.29	147.45	168.27	192.10	221.20
7	396.67	424.82	454.93	518.62	599.41	698.34	820.58
8	48.52	52.47	56.96	66.23	77.46	90.91	107.62
9	311.93	337.11	365.88	424.79	497.97	586.67	697.11
10	271.20	292.04	314.41	361.47	421.43	494.92	586.23
11	449.87	484.79	525.12	607.17	709.52	834.27	989.37
12	258.23	283.03	307.84	357.95	420.41	497.54	593.88
13	226.34	246.10	265.62	305.86	355.56	414.64	487.69
14	1077.96	1168.39	1253.77	1431.49	1656.14	1931.87	2272.86
<b>Total</b>	<b>3,550.70</b>	<b>3,832.42</b>	<b>4,126.43</b>	<b>4,740.50</b>	<b>5,506.24</b>	<b>6,434.62</b>	<b>7,584.53</b>

Source: Tables 1, Appendix 1 and Table 1, Appendix 3

**Table 3 - Base year comparison goods study area market shares (%)**

	Study Area Market Share	% inflow
Zone 1 - Canterbury	18.86%	5.00%
Zone 2 - Canterbury West	0.02%	
Zone 3 - Canterbury South East	0.00%	
Zone 4 - Canterbury North East	0.01%	
Zone 5 - Herne Bay	1.21%	
Zone 6 - Whitstable	1.03%	
<b>Canterbury sub-total</b>	<b>21.13%</b>	
Rest of study area (Zones 7 to 14)	62.57%	
Outside study area	16.30%	
<b>TOTAL</b>	<b>100.00%</b>	

Source: *Canterbury Retail and Leisure Study (July 2020) - Table E, Appendix 8.*

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**Table 4 - Base year 2022 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	722.79	38.04	760.84
Zone 2 - Canterbury West	0.77	0.00	0.77
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.38	0.00	0.38
Zone 5 - Herne Bay	46.37	0.00	46.37
Zone 6 - Whitstable	39.47	0.00	39.47
<b>Canterbury sub-total</b>	<b>809.79</b>	<b>38.04</b>	<b>847.83</b>
Rest of study area (Zones 7 to 14)	2,397.95	0.00	2,397.95
Outside study area	624.68	0.00	624.68
<b>TOTAL</b>	<b>3,832.42</b>	<b>38.04</b>	<b>3,870.46</b>

Source: Tables 2 and 3

**Table 5 - Future 2025 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	778.24	40.96	819.21
Zone 2 - Canterbury West	0.83	0.00	0.83
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.41	0.00	0.41
Zone 5 - Herne Bay	49.93	0.00	49.93
Zone 6 - Whitstable	42.50	0.00	42.50
<b>Canterbury sub-total</b>	<b>871.91</b>	<b>40.96</b>	<b>912.88</b>
Rest of study area (Zones 7 to 14)	2,581.91	0.00	2,581.91
Outside study area	672.61	0.00	672.61
<b>TOTAL</b>	<b>4,126.43</b>	<b>40.96</b>	<b>4,167.39</b>

Source: Tables 2 and 3



**Table 6 - Future 2030 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	894.06	47.06	941.11
Zone 2 - Canterbury West	0.95	0.00	0.95
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.47	0.00	0.47
Zone 5 - Herne Bay	57.36	0.00	57.36
Zone 6 - Whitstable	48.83	0.00	48.83
<b>Canterbury sub-total</b>	<b>1,001.67</b>	<b>47.06</b>	<b>1,048.72</b>
Rest of study area (Zones 7 to 14)	2,966.13	0.00	2,966.13
Outside study area	772.70	0.00	772.70
<b>TOTAL</b>	<b>4,740.50</b>	<b>47.06</b>	<b>4,787.55</b>

Source: Tables 2 and 3

**Table 7 - Future 2035 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	1,038.48	54.66	1,093.13
Zone 2 - Canterbury West	1.10	0.00	1.10
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.55	0.00	0.55
Zone 5 - Herne Bay	66.63	0.00	66.63
Zone 6 - Whitstable	56.71	0.00	56.71
<b>Canterbury sub-total</b>	<b>1,163.47</b>	<b>54.66</b>	<b>1,218.13</b>
Rest of study area (Zones 7 to 14)	3,445.26	0.00	3,445.26
Outside study area	897.52	0.00	897.52
<b>TOTAL</b>	<b>5,506.24</b>	<b>54.66</b>	<b>5,560.90</b>

Source: Tables 2 and 3

**Table 8 - Future 2040 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	1,213.57	63.87	1,277.44
Zone 2 - Canterbury West	1.29	0.00	1.29
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.64	0.00	0.64
Zone 5 - Herne Bay	77.86	0.00	77.86
Zone 6 - Whitstable	66.28	0.00	66.28
<b>Canterbury sub-total</b>	<b>1,359.63</b>	<b>63.87</b>	<b>1,423.51</b>
Rest of study area (Zones 7 to 14)	4,026.14	0.00	4,026.14
Outside study area	1,048.84	0.00	1,048.84
<b>TOTAL</b>	<b>6,434.62</b>	<b>63.87</b>	<b>6,498.49</b>

Source: Tables 2 and 3

**Table 9 - Future 2045 comparison goods turnover (£M)**

	Study Area Turnover £M	Inflow £M	Total Turnover £M
Zone 1 - Canterbury	1,430.44	75.29	1,505.73
Zone 2 - Canterbury West	1.52	0.00	1.52
Zone 3 - Canterbury South East	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.76	0.00	0.76
Zone 5 - Herne Bay	91.77	0.00	91.77
Zone 6 - Whitstable	78.12	0.00	78.12
<b>Canterbury sub-total</b>	<b>1,602.61</b>	<b>75.29</b>	<b>1,677.90</b>
Rest of study area (Zones 7 to 14)	4,745.64	0.00	4,745.64
Outside study area	1,236.28	0.00	1,236.28
<b>TOTAL</b>	<b>7,584.53</b>	<b>75.29</b>	<b>7,659.81</b>

Source: Tables 2 and 3

**Table 10 - Comparison goods commitments (2020 prices)**

	Sales floorspace (sq.m net)	Comparison goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
<b>Zone 1</b>				
Formula One Autocentre	157	157	£4,000	£0.63
Land off Cockering Road Thannington	350	175	£4,000	£0.70
South Canterbury	1,400	350	£4,000	£1.40
<b>Zone 5</b>				
Herne Bay Bus Station	540	540	£5,000	£2.70
Herne Bay Golf Club	260	260	£5,000	£1.30
Beach Street Car Park	100	100	£5,000	£0.50

**Table 11 - Summary of comparison goods turnovers 2022 to 2040 (£M)**

	2022	2025	2030	2035	2040	2045
<b>Available expenditure</b>						
Zone 1 - Canterbury	722.79	819.21	941.11	1,093.13	1,277.44	1,505.73
Zone 2 - Canterbury West	0.77	0.83	0.95	1.10	1.29	1.52
Zone 3 - Canterbury South East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.38	0.41	0.47	0.55	0.64	0.76
Zone 5 - Herne Bay	46.37	49.93	57.36	66.63	77.86	91.77
Zone 6 - Whitstable	39.47	42.50	48.83	56.71	66.28	78.12
<b>Total</b>	<b>809.79</b>	<b>912.88</b>	<b>1,048.72</b>	<b>1,218.13</b>	<b>1,423.51</b>	<b>1,677.90</b>
<b>Turnover of existing facilities</b>						
Zone 1 - Canterbury	722.79	810.10	906.75	1030.92	1172.09	1332.59
Zone 2 - Canterbury West	0.77	0.86	0.96	1.09	1.24	1.41
Zone 3 - Canterbury South East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.38	0.43	0.48	0.55	0.62	0.71
Zone 5 - Herne Bay	46.37	51.97	58.17	66.14	75.20	85.50
Zone 6 - Whitstable	39.47	44.24	49.52	56.30	64.01	72.78
<b>Total</b>	<b>809.79</b>	<b>907.60</b>	<b>1,015.89</b>	<b>1,155.00</b>	<b>1,313.16</b>	<b>1,492.98</b>
<b>Turnover of commitments</b>						
Zone 1 - Canterbury	2.73	3.06	3.42	3.89	4.42	5.03
Zone 2 - Canterbury West	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3 - Canterbury South East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4 - Canterbury North East	0.00	0.00	0.00	0.00	0.00	0.00
Zone 5 - Herne Bay	4.50	5.04	5.65	6.42	7.30	8.30
Zone 6 - Whitstable	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>7.23</b>	<b>8.10</b>	<b>9.07</b>	<b>10.31</b>	<b>11.72</b>	<b>13.33</b>
<b>Surplus/deficit expenditure £M</b>						
Zone 1 - Canterbury	n/a	6.05	30.94	58.33	100.93	168.11
Zone 2 - Canterbury West	n/a	-0.03	-0.01	0.01	0.04	0.10
Zone 3 - Canterbury South East	n/a	0.00	0.00	0.00	0.00	0.00
Zone 4 - Canterbury North East	n/a	-0.02	-0.01	0.00	0.02	0.05
Zone 5 - Herne Bay	n/a	-7.09	-6.46	-5.93	-4.64	-2.02
Zone 6 - Whitstable	n/a	-1.74	-0.69	0.41	2.27	5.34
<b>Total</b>	<b>n/a</b>	<b>-2.82</b>	<b>23.77</b>	<b>52.82</b>	<b>98.62</b>	<b>171.59</b>

Source: Tables 4 to 10

**Table 12 - Comparison goods floorspace capacity**

	2022	2025	2030	2035	2040	2045
<b>Turnover density new floorspace (£ per sq.m)</b>	£7,000	£7,845	£8,782	£9,984	£11,351	£12,906
<b>Sales floorspace projection (sq.m net)</b>						
Zone 1 - Canterbury	n/a	771	3,524	5,842	8,891	13,026
Zone 2 - Canterbury West	n/a	-4	-2	1	4	8
Zone 3 - Canterbury South East	n/a	0	0	0	0	0
Zone 4 - Canterbury North East	n/a	-2	-1	0	2	4
Zone 5 - Herne Bay	n/a	-903	-736	-594	-408	-156
Zone 6 - Whitstable	n/a	-222	-79	41	200	414
	<b>n/a</b>	<b>-360</b>	<b>2,707</b>	<b>5,290</b>	<b>8,688</b>	<b>13,295</b>

Source: Table 11

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