Sevenoaks District Retail Study

Volume One — Main Report | September 2016

Appendix A

on behalf of Sevenoaks District Council

BILFINGER | GVA

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Report date: **September 2016**

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For and on behalf of GVA Grimley Ltd

1. INTRODUCTION

1.1 Bilfinger GVA has been instructed by Sevenoaks District Council to undertake the **Sevenoaks District Retail Assessment 2016**. The aim of the study is to provide the Council with an up-to-date evidence base on the existing and future roles and performance of the District's Town, and Service Centres and assess future demand for retail floorspace in the District over the period to 2035. The study has full regard to the expected levels of growth in Sevenoaks and neighbouring authorities, as well as recent and emerging changes in consumer behaviour. Our report provides the Council with a strategy to ensure its network of centres remain vibrant, attractive destinations over the course of the Council's new Local Plan period. It is fully compliant with the requirements of the National Planning Policy Framework (NPPF), and will be able to be used by the Council to inform policies and land use allocations, including the preparation of the aforementioned Local Plan.

1.2 Our study has been informed by on-site and desk-based information-gathering, including site visits to each of the 'Town Centres and Service Centres' in Sevenoaks District. We have also undertaken a desk-based analysis of the Council's network of Service Villages.

1.3 Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across Sevenoaks District, and adjacent surrounding areas in which residents may look towards facilities in Sevenoaks District to meet their shopping and leisure needs within the survey area. The extent of the survey area was agreed with the Council at the initial stage of preparation of this study, and the results of the survey can also be used to understand the extent to which surrounding centres and shopping destinations outside the District (such as Bluewater, Royal Tunbridge Wells, Dartford and Orpington) compete with the network of centres within the study area, and define the amount of expenditure 'leakage' taking place to locations outside the District. Additionally in-centre surveys were also instructed as part of this study; these were undertaken in the centres of Sevenoaks, Swanley, Edenbridge, New Ash Green, Westerham and Otford.

1.4 The study acts as a full update to the Council's previous evidence base studies in respect of retail and town centres, namely the Sevenoaks Retail Study (2005) and Sevenoaks District Council Retail Study Update (2009). The last household survey of shopping patterns of residents in Sevenoaks District was undertaken as part of the Sevenoaks Retail Study in 2005.

1.5 Our report refers to different types of retail and commercial leisure floorspace, as follows:

- **'Convenience'** goods refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on;
- **'Comparison'** goods refers to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music
- **'Services'** uses refers to commercial leisure services such as restaurants and cafes, retail services such as hairdressers, beauty salons, banks, building societies and estate agents, as well as non-retail uses such as cinemas and arts centres.

1.6 Our report is split into four volumes. This report forms Volume 1 to the study; Volume 2 sets out supporting plans and appendices; Volume 3 provides the household telephone survey data, prepared by NEMS Market Research; and Volume 4 provides the in-centre survey results. The remainder of this report (Volume 1) is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and town centre planning;
- **Section 3** considers recent national trends in the retail sector, and in particular the implications of recent economic growth and technological advances which are impacting on shopping habits;
- **Section 4** considers the wider study context, identifying the key competing centres surrounding the District, and the extent to which they influence the shopping patterns of residents, as well as providing a summary of their current retail and commercial leisure offer, and proposals for future enhancement of this;
- **Section 5** reviews the composition, role and function of current shopping provision in the Town and Service Centres in Sevenoaks District through 'health check' assessments, as well as reviewing out-of-centre shopping provision;
- **Section 6** sets out our approach to calculating retail capacity, including definition of the household telephone survey area and discussion of approach to the household telephone survey;
- **Section 7** sets out the quantitative 'need' for additional comparison goods retail floorspace in Sevenoaks District over the study period to 2035, with the convenience goods quantitative 'need' assessment provided in **Section 8**;
- **Section 9** draws our analysis together and set out conclusions, strategic guidance and recommendations on future change and growth in Sevenoaks's network of centres.

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2. PLANNING POLICY CONEXT

2.1 In this section we summarise the key features of national and local planning policy guidance which provide the context and framework for this study.

NATIONAL POLICY FRAMEWORK

National Planning Policy Framework (NPPF), 2012

2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of National Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.

2.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

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

2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

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

2.6 Consistent with transitional arrangements, the Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:

- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
- Justified i.e. the most appropriate strategy, when considered against the alternatives;
- Effective i.e. deliverable over its plan period and based on effective joint working; and
- Consistent with national policy i.e. enable the delivery of sustainable development

2.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless

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material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

National Planning Policy Guidance (NPPG) (2014)

2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

LOCAL POLICY FRAMEWORK FOR SEVENOAKS DISTRICT

Sevenoaks Core Strategy (March 2011)

2.9 The Sevenoaks Core Strategy (February 2011) sets out the vision and policies for future development in the District over the period to 2026. It sets out how sustainable growth will be accommodated largely within existing urban settlements, how the natural environment of the area will be protected and the requirements that proposed new development must meet.

2.10 The spatial vision states that Sevenoaks District will deliver up to 3,300 additional dwellings over the plan period 2006-2026. The spatial vision sets out that the majority of new housing will be focused upon the urban areas of Sevenoaks and Swanley. The vision sets out that Sevenoaks urban area will combine new retail, tourism and housing development to support its role as the principal town centre within West Kent. It is stated that Swanley will be regenerated to create a town centre that better meets the needs of the community and supports the economy through the development of new shops, offices, hotel and residential. Finally, it is stated that Edenbridge will retain its role as a service centre serving the surrounding villages. New Ash Green Local Service Centre is identified as being a location for regeneration.

2.11 Paragraph 4.1.6 of the Core Strategy identifies the settlement hierarchy within Sevenoaks District. As has previously been noted, Sevenoaks is the principal town, Swanley is identified as the secondary town, Edenbridge is identified as the rural service centre, and New Ash Green, Otford, and Westerham are identified as local service centres. It is these six centres which form the basis of the assessment set out in the study.

Table 2.1: Settlement Hierarchy in Sevenoaks District

Centre Hierarchy	Centre
Principal Town Centre	Sevenoaks
Secondary Town Centre	Swanley
Rural Service Centre	Edenbridge
Local Service Centres	Westerham, New Ash Green and Otford
Service Villages	Brasted, Crockenhill, Eynsford, Farningham, Halstead, Hartley, Hextable, Horton Kirby, Kemsing, Knockholt Pound, Leigh, Seal, Sevenoaks Weald, Shoreham, South Darenth, Sundringe and West Kingsdown.

Source: Sevenoaks Core Strategy (adopted February 2011)

2.12 In terms of the potential for growth, Table 2.1 of the Core Strategy identifies that Sevenoaks urban area will support 1,331 housing units, Swanley 660 housing units and Edenbridge 411 units. Policy LO1 of the Core Strategy states that development will be focused within the Sevenoaks urban area. Additionally this policy states that Swanley will be the secondary focus for development to aide regeneration, and development within Edenbridge will be appropriate to the scale of the centre.

2.13 Policy LO2 states that the emphasis of development within the Sevenoaks urban area should be located within the town centre, within easy walking distance of the town centre and/or stations.

2.14 In relation to Sevenoaks town centre, paragraph 4.2.19 identifies potential sites for new development:

- West of Bligh's Meadow on the north western side of the town centre (mixed use development to include retail and café/restaurant use (this development has been implemented).
- East of the High Street adjoining Buckhurst Way (this area is owned by the Council and offers scope for retail development with related town centre uses closely linked to the High Street)

2.15 Policy LO3 further elaborates on development potential in Sevenoaks town centre and states that the town centre can accommodate approximately 4,000 sq.m of new shopping floorspace (1,700 sq.m of convenience and 2,300 sq.m of comparison) will be provided within

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the town centre up to 2026. It should be noted that these findings were informed by the Council's previous retail evidence base study (Sevenoaks District Council Retail Study Update, GVA, June 2009), which this study updates.

2.16 Section 4.3 sets out the development strategy in Swanley. Policy LO4 suggests that Swanley could accommodate up to 660 dwellings, and states that the emphasis for development will be on the town centre and adjoining areas. The supporting text of this policy states that the Council has been working with landowners to promote a regeneration scheme for the town centre. It is stated that '*the enhancement of the centre can act as a catalyst for enhancing the town*'. Paragraph 4.3.21 states that the town centre would benefit from a hotel development which would assist with regeneration in the town centre and widen the range of activity provided within the centre. A planning application for the redevelopment of Swanley Square, which forms the main retail area in Swanley town centre, has recently been submitted to the Council.

2.17 Policy LO5 relates specifically to Swanley town centre and states that the town centre will be regenerated so that it better meets the needs of the population it serves. The regeneration scheme will contain a mix of uses including retail, and the provision of a hotel will be supported.

2.18 Policy LO6 relates to development in Edenbridge. This states that in Edenbridge, provision will be made for 410 dwellings between 2006 and 2026 on a range of sites within the urban area. It goes on to state that the '*mix of retail and service uses that contribute to the vitality and viability of the town centre will be maintained*'.

Allocations and Development Management Plan (adopted February 2015)

2.19 The Sevenoaks Allocations and Development Management Plan (ADMP) provides the policy to implement and build upon the policies contained within the Core Strategy. Section 5 of the Sevenoaks Allocations and Development Management Plan focuses on Town and Service Centres. This section reiterates the settlement hierarchy set out in Policy LO1 of the Core Strategy.

2.20 The text box on page 48 relates to town and local centre definitions. This states that a town centre is a 'defined area, including the primary shopping area and areas predominately occupied by main town centre uses within or adjacent to the primary shopping area'. Primary Shopping Frontage is defined as being 'likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary Shopping Frontage is defined as being likely to include a diversity of uses such as retail, restaurants, cinemas and businesses.

2.21 Paragraph 5.7 states that applicants will be expected to show that proposals for change of use away from retail uses will need to meet the tests set out within the National Planning Policy Framework.

2.22 Policy TLC1- Sevenoaks Town Centre states that within the town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b), c) and d) (listed below the bullet points):

- *'outside the Primary Retail Frontages and the area defined in Policy EMP1(g) for B1 Business Use, and*
- *on the upper floors of units within Sevenoaks Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.*

b) within the Sevenoaks Primary Retail Frontage, at least 70% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the predominant retail function and not lead to a dead town centre frontage during regular shopping hours.

c) within the Sevenoaks Secondary Retail Frontage, proposals for the use of ground floor premises for retail and other A Class uses will be permitted where they would not lead to a dead town centre frontage. Ground floor A Class uses will be maintained except where evidence is provided by the applicant to show that these uses are no longer financially viable. In such circumstances, non-residential town centre uses at ground floor level would be permitted.

d) within the areas defined in Policy EMP1, Business Uses will be retained or permitted'.

2.23 Policy TLC2 relates to Swanley town centre. This policy states the following:

'a) within Swanley Town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b), and c):

- *outside the Primary Retail Frontages, and*
- *on the upper floors of units within Swanley Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.*

b) within the Swanley Primary Retail Frontage, at least 70% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the

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predominant retail function and not lead to a dead town centre frontage during regular shopping hours. Proposals resulting in the change of use of existing nonA1 uses within the Primary Frontage to retail and other A class uses will be permitted where this would be complementary to the predominant retail function.

c) within the Swanley Secondary Retail Frontage, proposals for the use of ground floor premises for retail and other A Class uses will be permitted where they would not lead to a dead town centre frontage. Ground floor A Class uses will be maintained except where evidence is provided by the applicant to show that these uses are no longer financially viable units in these uses. In such circumstances, non-residential town centre uses at ground floor level would be permitted'.

2.24 Policy TLC3 relates to Edenbridge town centre and states that:

'a) within Edenbridge town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b) and c)

- *outside the Primary Retail Frontage, and*
- *on the upper floors of units within Edenbridge Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.*

b) within the Edenbridge Primary Retail Frontage, at least 45% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the predominant retail function and not lead to a dead town centre frontage during regular shopping hours. Proposals resulting in the change of use of existing nonA1 uses within the Primary Frontage to retail and other A class uses will be permitted where this would be complementary to the predominant retail function.

c) in the Northern and Southern Areas of Edenbridge town centre, the balance between shops, services and community facilities and residential uses should be maintained, except where evidence is provided by the applicant to show that these non-residential uses are no longer financially viable. In such circumstances, residential redevelopment will be acceptable. Proposals that would result in changes between town centre uses in these areas will be permitted'.

2.25 Policy TCL4 sets the policy for Neighbourhood and Village Centres. This policy states that:

'Within neighbourhood and village centres, as defined in Appendix 8, a range of shops (including Use Class A1) and services (including Use Classes A2, A3, A4 and A5) will be maintained.

Changes of use between shopping and service uses within neighbourhood and village centres will be permitted where this would not lead to the loss of A1 units serving the day to day needs of the community or required to ensure that the centre is capable of meeting the day to day needs of the community during the plan period. Proposals resulting in a net loss of shopping or service uses will not be permitted unless evidence is provided to the Council to show that the operation of the facility is no longer financially viable and where there are no other realistic proposals for retail or service uses on the site, including through Community Right to Buy.

Appropriately located additional retail or service units in neighbourhood and village centres will be permitted where the proposal is of a scale appropriate to the centre and would not materially undermine the existing balance of uses.

Residential, business or community uses of the upper floors of units within neighbourhood and village centres will be encouraged where there will be no adverse impact on the functioning of the ground floor retail or community use'.

Sevenoaks District new Local Plan (2015-2035)

2.26 Sevenoaks District Council is in the process of preparing a new Local Plan for the District which will cover the period 2015-2035. It is anticipated that consultation on the Issues and Options Local Plan will take place in spring/summer 2017.

Evidence Base for the new Local Plan

2.27 In addition to the preparation of this Retail Study, a number of other documents are currently being prepared to form part of the new evidence base for the new local plan, including new Strategic Housing Market Assessment (SHMA) and Economic Needs Study (ENS).

2.28 The SHMA states that Sevenoaks District is within the West Kent Housing Market Area and identifies cross boundary interactions between Swanley and Dartford and Swanley and London. The SHMA states that Sevenoaks District has an average annual need of 620 units per annum between the years 2013-2033. At the time of preparation of this study, the Council have not made a final decision on strategic locations where this growth will be accommodated.

2.29 The ENS is a joint study for Sevenoaks District and Tunbridge Wells Borough Council. The study identifies that Swanley town centre, New Ash Green village centre, Edenbridge and Sevenoaks

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town are locations for potential growth within Sevenoaks District. The ENS is currently being finalised and we have had regard to its key conclusions in the preparation of this study.

2.30 As part of the development of the new Local Plan, a vision for Swanley and Hextable is being developed. It is understood that a draft version will be published in Autumn 2016 and that an update briefing was taken to committee in the early part of August 2016. The vision includes improvements to retail, residential development and infrastructure improvements. The Vision looks at different scenarios for growth over the plan period. A key recommendation of the vision is that regardless as to the growth scenario that is applied to the town centre, improvements to the train station are key to providing the supporting infrastructure to support the regeneration of Swanley. It is also recognised that U+I, main landowner, has submitted its own planning application for the town centre, running alongside the Vision process.

2.31 A number of other evidence base documents have been prepared or are in the process of being prepared including:

- Sevenoaks District Tourist Accommodation Study (September 2015)
- Strategic Housing Land / Economic Land Availability Assessment (SHLAA/ELAA in preparation 2016)
- Open Space, Sports & Leisure Study (in preparation 2016)
- Strategic Flood Risk Assessment (in preparation 2016)
- Swanley and Hextable Vision (in preparation 2016)
- Green Belt Assessment (in preparation 2016/17)
- Landscape Character and Capacity Study (in preparation 2016/17)
- Affordable Housing / Commercial Viability update (in preparation 2016/17)
- Infrastructure Plan / Transport Update (in preparation 2016/17)
- Settlement Hierarchy update (in preparation 2016/17)
- A Sustainability Appraisal / Strategic Environmental Assessment (SA/SEA) is being prepared concurrently with the Local Plan.

Changes in legislation

2.32 The Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. Of particular relevance, the amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities which restrict the amount of non-A1 units in a retail centre or frontage, such as those set out above in the ADMP.

Summary

- **The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.**
- **The Council's development plan is chiefly formed of the Sevenoaks Core Strategy (March 2011) and the Allocations and Development Management Plan (February 2915). Together, these documents confirm that town and service centres will continue to be the focus for new development. New development will be delivered in accordance with a clear spatial strategy, which provides the most sustainable way to accommodate growth supported by high quality infrastructure, whilst respecting the unique character of the District and the local distinctiveness of individual settlements. Main settlement areas including Sevenoaks and Swanley have been identified as the most sustainable locations for new development within Sevenoaks District.**
- **A vision for Swanley is currently being developed, and it is understood that this will be published in Autumn 2015.**

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3. STUDY AREA AND CONTEXT

3.1 In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in Sevenoaks District.

A return to growth

3.2 Analysis published by Experian (Retail Planner 2015) identified that following several years of subdued performance, including a period of recession; a 'strong economic upswing' took place in early 2013, driven by increases in consumer spending and business investment. Experian expect the UK economic upswing to continue, although at a slower pace than seen in recent years. In the short-to-medium term, Experian expect progress to be 'restrained' due to government finances remaining under pressure, and weaker exports to the Eurozone.

3.3 Experian also point to the fact whilst retail sales have prospered between 2013 and 2016 due to the 'exceptional buoyancy' of consumer spending (because of low inflation and stronger earnings growth), this buoyancy is only true in terms of volumes of sales. Experian state that the value of goods has 'been depressed by heavy discounting and persistent deflation of goods prices'. This has been particularly noticeable in the convenience (food) goods sector.

3.4 There has therefore been a return in confidence to consumer spending since 2013, which offers potential for strongly-performing town centres to capitalise on, although this is tempered by other changes in the retail sector which we discuss below.

3.5 The implications of the UK's decision to leave the European Union on 22nd June 2016 may also provide a further restraint on future levels of expenditure growth, given the uncertainty over the nature and format of the country's future relationship with Europe will be. However, data providers such as Experian have confirmed that it is too early to speculate on the extent to which this decision may influence economic growth in either the short to medium term, but this will need to be monitored carefully over the course of the Council's new Local Plan period by way of regular updating of the Council's retail capacity forecasts.

Changing Retailer Space Requirements

3.6 During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations (such as Bluewater for example), supported by smaller satellite stores and transactional websites. Many operators are continuing to close stores in less-profitable, smaller locations as leases expire.

3.7 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, often supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats, and can pose a particular challenge to smaller and medium-sized centres, where there are higher order centres in close proximity.

3.8 An often inevitable consequence of the above trend is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Primark and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. Sevenoaks town centre appears to have been relatively resilient post-recession, whilst the centre has representation from more value orientated retailers such as Poundland, it has retained and indeed attracted some more 'mainstream' operators such as Marks & Spencer. Indeed through the Bligh's Meadow development, Sevenoaks town centre has attracted brands that specifically target market towns – these brands include Mint Velvet, Fat Face and Crew Clothing.

3.9 Consequently, Sevenoaks has successfully developed an upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. Examples of other centres that have successfully developed a more upmarket offer include Royal Tunbridge Wells, Horsham and Guildford which have continued to perform strongly throughout the economic downturn, by offering a curated, specialist retail offer often centred on upmarket clothing, homewares, and casual dining offer. Typically these centres also offer a strong historical setting and environmental quality which increases their attractiveness as 'destinations' (a point we discuss further below).

Internet Growth & Multichannel Retailing

3.10 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised

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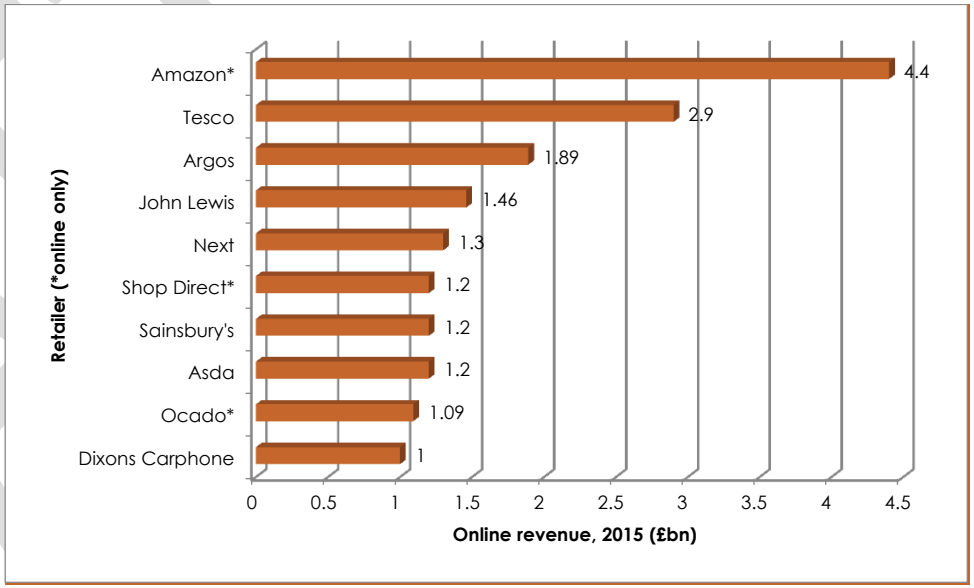
concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.

3.11 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict comment that '*the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement*'. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.

Westerham Green

3.12 Many national retailers now operate 'Click & Collect' facilities, with examples in Sevenoaks District including Marks & Spencer, Tesco, and Boots. It is noteworthy that of the top ten online retailers in 2015, seven have a physical presence on the UK High Street, and all of these offer 'Click & Collect' facilities (**Figure 3.1**). Of these seven, two are currently trading in Sevenoaks town centre (Tesco and Waitrose (for John Lewis) and Sainsbury's, Argos and Asda also have a trading presence elsewhere in Sevenoaks District. Despite being a relatively new concept for the retail sector to embrace, click & collect is therefore affirming that physical stores can continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition. The Click & Collect phenomenon can be expected to drive an occupier desire to maintain a representation of physical store units across town centres.

Figure 3.1: Top ten UK retailers by online revenue, 2015



*Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores*

The role of the town centre

3.13 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the final

quarter of 2015[1], emphasising the need for centres to offer as broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.

3.14 Our health check assessment of Sevenoaks town centre (Section 5) confirms that there is a good level of provision of bars, restaurants and food outlets within the town centre, which means that footfall, particularly outside of retail trading hours, is relatively strong. There is clearly potential to further integrate the retail and leisure offer within the town centre. We discuss this further in the following sections of this report.

3.15 Centres which offer a unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly; such examples in Sevenoaks District include Edenbridge, Otford and Westerham. Enhancing the non-retail offer so town and district centres function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness — in Sevenoaks town centre there is potential to further enhance its links with heritage assets such as Knole, and in Westerham Chartwell and its links with Winston Churchill, is a unique selling point few other locations can capitalise on. Sevenoaks and Westerham represent an important example of how place marketing can be used to raise the image and profile of a location.

3.16 To ensure that town and district centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives. Many of the centres in Sevenoaks District are already performing well in this respect and this should remain an important element of the Council's strategy for the development and enhancement of its centres.

3.17 A number of town centres have sought to establish partnerships which seek to develop, support and promote their town centres. Quite often, these take the form of Business Improvement Districts (BIDs). Examples of successful BIDs which have been established in centres comparable to those in Sevenoaks District include Ulverston, Kendal, Camberley and Oxted.

3.18 Typically, BIDs levy an additional charge on top of business rates which fund events and schemes within town centres to enhance their attractiveness as shopping destinations. The levies typically range between 1-1.5%, of the rateable value of businesses in the area. There are currently no BIDs in Sevenoaks District and there may be potential for the establishment of these providing sufficient local buy in can be secured, however many town centres are small with limited capacity to create enough momentum and support to ensure a successful BID.

The convenience sector

3.19 The convenience goods market has witnessed a fundamental change in shopping patterns in recent years, as people increasingly prefer to shop more frequently in smaller-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016. Sainsbury's gained planning consent in March 2014 for a new store on Fircroft Way, Edenbridge. However, in May 2015, Sainsbury's announced that it would not be bringing the site forward, citing that the scheme was no longer viable.

Asda store in Swanley town centre

[1] Source: British Retail Consortium, January 2016

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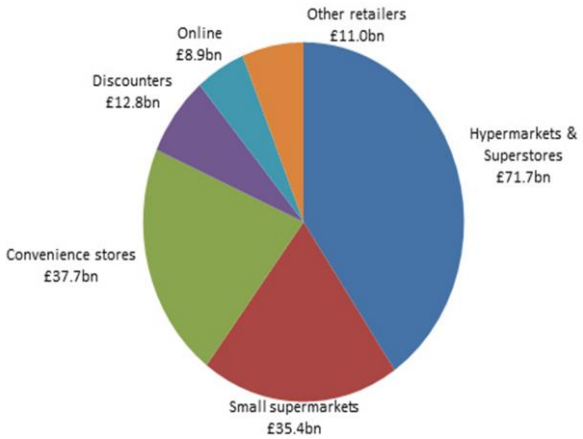
3.20 The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and are pursuing ambitious development programme of opening new stores as well as refurbishing older stores. There has also been growth at the 'premium' end of the convenience goods market, with both Waitrose and M&S Food growing store numbers (with both retailers being represented within Sevenoaks town centre), with Waitrose having invested in redeveloping their store in recent years.

3.21 The chart below (**Figure 3.2**) shows the composition of the convenience goods sector in 2015, based on data collected by The Institute of Grocery Distribution (IGD). IGD estimate that the UK grocery market was worth £177.5bn in 2015, and of this 'convenience stores' (defined by IGD as stores under 3,000 sq.ft net) claiming £37.7bn of this (21.2%). However, as Figure 3.2 shows, notwithstanding the unquestionable growth in the popularity of 'convenience' stores, most of the food shopping spend is still accounted for by larger-format stores — £71.7bn was spent in 'hypermarkets and superstores' (stores over 25,000 sq.ft net) in 2015, and a further £35.4bn in 'small supermarkets' (stores between 3,000 and 25,000 sq.ft net).

3.22 There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, and indeed these remain the principle format of convenience goods shopping for the District, but more widely speaking operators are opening more, smaller format stores than was the case at the time of the Council's previous evidence base studies. Operators with 'hyper-market' format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury's are trialling Argos concessions, and branches of Tesco Extra include either concessions from retailers such as Holland and Barrett, Dorothy Perkins and Burton.

Figure 3.2: UK grocery market spending, 2015



Source: IGD UK Grocery Market and channel forecasts 2015-20.

3.23 These examples confirm that there remains appetite from foodstore operators to open new stores where suitable opportunities arise, although the size of foodstores being committed to is generally less than has previously been the case. We expect the 'big four' retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Out-of-Centre Retailing

3.24 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

3.25 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M. In Sevenoaks District there is a small concentration of out-of-centre retail warehousing at the Otford Road Retail Park and Aisher Way. Whilst many of the stores are 'bulky goods' in nature, there are examples outside of the district in locations such as Orpington and Royal Tunbridge Wells of units being occupied by 'high street' retailers, and these can be expected to compete with centres in Sevenoaks town centre for comparison goods spending.

3.26 Additionally, the impact upon Sevenoaks town and the wider district of Bluewater Shopping Centre should not be underestimated. The role and nature of Bluewater reflects a wider trend which has, in recent years, seen the evolution of the traditional mall, expanding the product offer, and developing beyond just retail to introduce food and beverage, and other leisure uses such as cinemas, encouraging longer dwell times. The offer of large shopping malls such as Bluewater has now developed into creating a 'destination' that provides retail, leisure uses (such as cinema, and urban golf) and food and beverage. We discuss the influence of Bluewater on shopping patterns within the district in Section 4.

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Commercial Leisure

3.27 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres.

3.28 Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns, such as Swanley which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.

3.29 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. In recent years, expansion in the restaurant sector has been driven by 'casual dining' operators such as Byron, Giraffe, GBK, Wagamama, Carluccios, Pizza Express and so on – although as mentioned above, whilst Sevenoaks town centre has attracted a number of these operators, there are still gaps within this sector. It is also clear that in terms of food and beverage, the smaller centres within Sevenoaks District have successfully retained a number of independent operators.

3.30 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers, albeit more slowly outside of London. A number of independent shops operate in Sevenoaks town centre.

3.31 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that *'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub'* (our emphasis). The report goes on to identify *'the need to improve the leisure and food and beverage offer,and to develop the evening economy through restaurants and in-town cinemas'*

3.32 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline has continued at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon (operator of The Sennockian in Sevenoaks) have achieved sales growth in recent years and continue to expand. In London, the popularity of specialist pubs offering craft beers and local ales also remains strong, and this is a trend which is now becoming popular in other urban areas. This is an area of potential growth that could be developed within some of the centres in the District.

3.33 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym (none of which currently have a facility within Sevenoaks District). This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.

3.34 The cinema market is also continuing to perform strongly, and in recent years has overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK.

3.35 Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate complementary 'family dining' restaurants such as Nando's, Pizza Express and so on, as well as coffee shops, enabling them to act as leisure 'destinations' in their own right. For example, Cineworld has opened eight new sites since 2015, including in market towns such as Loughborough and Hinckley; Odeon has opened fewer new sites (six since 2012) but also continues to open in smaller centres, such as Llanelli and Trowbridge. Everyman and Curzon cinemas offer a more 'boutique' cinema experience and are locate in towns of a similar size to Sevenoaks – Everyman have recently opened in Harrogate.

Summary

- **The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. Whilst confidence is**

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now returning to consumer spending — particularly in terms of comparison goods spending — the growth in online shopping, including multi-channel retailing, acts as tough competition for the high street. It also however presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.

- Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Many retail parks are seeking to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.
- Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets including cinemas, arts venues, cafés, bars and restaurants to increase length of stay and spend.
- It will be important, therefore, for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place. Many of the centres in Sevenoaks District are already placed well in this respect of having a diverse offer and role of the town centre, but continued enhancement and promotion of these uses will be necessary over the course of the Council's Local Plan period.

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4. THE SUB-REGIONAL CONTEXT

4.1 In this section, we first set out the sub-regional context within which the Town and District Centres in Sevenoaks operate in. This is an important consideration as patterns of retail and leisure visits are not 'closed' systems, and increasingly residents are willing to travel longer distances, particularly for comparison goods shopping and leisure. Therefore, it is natural to expect a degree of expenditure 'leakage', and this is particularly applicable in the case of Sevenoaks given that (i) the centres in the District are in some cases relatively small and (ii) the District is surrounded by a number of 'heavyweight' retail destinations such as Bluewater, which both have a retail offer of a scale which enables them to draw trade from wide catchment areas, particularly in the case of Bluewater.

4.2 In order to establish where residents in the District are currently undertaking their shopping and leisure visits, a household telephone survey of shopping patterns was undertaken in support of this study. Further details of this, including the definition of the 'survey area' which has formed the basis of our assessment, is provided in Section 6. To summarise, the household survey identified that the destinations shown in Table 4.1 represent the key competitors for centres in Sevenoaks District, in respect of comparison goods spending:

- **Bluewater** (claims £362.5m of comparison goods spending available to survey area);
- **Royal Tunbridge Wells** (claims £141.1m of comparison goods spending available to survey area)
- **Orpington** (claims £129.5m of comparison goods spending available to survey area);
- **Dartford** (claims £85.4m of comparison goods spending available to survey area);
- **Bromley** (claims £69.9m of comparison goods spending available to survey area); and
- **Maidstone** (claims £60.6m of comparison goods spending available to survey area);

Bluewater

- **Venuescore Retail Ranking: 26**
- **Trade draw from survey area: £362.5m**

4.3 Bluewater Shopping Centre is approximately 18 miles from Sevenoaks. Bluewater is a major 155,700 sq.m out of town shopping and leisure complex situated in the borough of Dartford, northwest Kent, owned 30% by its developer Land Securities, 10% by Hermes, 25% by Lend Lease Group and 35% by Prudential Plc. It is built over three floors and anchored by large John Lewis, Marks and Spencer and House of Fraser alongside 327 other retail, eating or drinking outlets, of which 40 are restaurants. The centre also comprises a 13 screen cinema, events venue Glow and an adventure golf course.

4.4 Since its opening the centre has undergone numerous refurbishments, upgrades and extensions to maintain its position as a shopping centre of regional importance and further improve its offer to visitors. Venuescore ranks Bluewater at 26th position in its 2014-15 Index, and identifies the 'market position' as being 'Middle'.

Planned Development

4.5 A planning application has recently been submitted to Dartford Borough Council (August 2016) for the redevelopment of Bluewater's West Village, which if permitted will increase the size of the complex by approximately 30,000 sq.m of additional retail floorspace and could create 2,300 jobs.

Royal Tunbridge Wells

- **Venuescore Retail Ranking: 52**
- **Trade draw from survey area: £141.1m**

4.6 Royal Tunbridge Wells is approximately 11.6 miles from the town centre. Royal Tunbridge Wells town centre provides a mix of retail, leisure, cultural and civic facilities. It is an affluent town with very low unemployment. Venuescore[2] ranks Royal Tunbridge Wells in 52nd position in its 2014-15 Index. Venuescore identify the 'market position' of Royal Tunbridge Wells as being 'Upper Middle' (see footnote 2). The Experian Goad category report for Royal Tunbridge Wells identifies a total of 65,635 sq.m of ground floorspace for retail and service units, comprising 494 outlets.

[2] Venuescore is an annual survey compiled by Javelin Group, which ranks the UK's top 3,500+ retail venues (town centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on a number of factors including scale of offer, presence of key attractors/ 'anchor' stores and market positioning (a 'lower' market position indicates a value/discount-orientated retail offer, whilst an 'upper' market positioning indicates an upmarket/quality/exclusive retail offer). In reality, most centres fall within the 'upper middle', 'middle' or 'lower middle' market positions, depending on how diverse the quality of their retail mix is.

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4.7 The centre has a number of different character areas each with a different retail/leisure mix, and this variety in its offer is an important factor in its generally strong vitality and viability. National retailer representation is focused in and around recent Royal Victoria Place, including representation from Marks & Spencer and Fenwick, plus clothing operators such as Topshop/Topman, Next, Gap, and River Island. The closure of the BHS store in the town centre as a result of the company entering administration will release a prime retail site onto the market. Higher-end retail and restaurants located on Mount Pleasant Road (which links the town centre with the town's railway station), and beyond this on High Street, and representation in this area includes more specialist operators such as Joules, Cath Kidston and Jigsaw. Beyond this, the historic Pantiles and the Corn Exchange areas offer a range of quality upmarket boutiques and cafes, where the offer is more focused towards independent retailers.

4.8 Royal Tunbridge Wells Together is a recently formed town centre management organisation for Royal Tunbridge Wells. Its aim is to provide effective leadership, co-ordination and resources to make Royal Tunbridge Wells a high quality destination for business, retail, culture and leisure and to maintain its competitive edge within the south east region by increasing vitality and viability across the town centre. Royal Tunbridge Wells Together is a partnership organisation between Royal Tunbridge Wells Borough Council and a wide variety of businesses operating in the town centre. It is now being considered whether the organisation should become a full Business Improvement District.

Out of Centre Retail in Royal Tunbridge Wells

4.9 Royal Tunbridge Wells has a substantial amount of out-of-town retail floorspace in the North Farm / Longfield Road area, approximately 4km to the north-east of the town centre. The offer here is a mixture of 'bulky goods' and 'high street', but has in recent years increasingly moved towards the latter, with representation from John Lewis at Home, Marks & Spencer Food & Home, TK Maxx and so on. An Asda supermarket also opened on Longfield Road in 2012.

Planned Development

4.10 Royal Tunbridge Wells town centre has a number of opportunity sites for development which are expected to come forward for a mixture of town centre uses in the short to medium term:

- Royal Tunbridge Wells Borough Council, Kent County Council and Royal Tunbridge Wells Museum & Art Gallery are currently planning a combined Learning & Culture Hub for the town which will move together the Museum, Art Gallery, Library, Adult Education Services, Visitor Information Centre and Gateway (Royal Tunbridge Wells Borough Council's public service centre) into one combined complex. The project is being funded by the Heritage Lottery Fund and will involve the restoration, refurbishment and joining of two existing buildings. An architect for the project has recently been procured.
- Royal Tunbridge Wells Borough Council are seeking the redevelopment of the former cinema site on the corner of Mount Pleasant Road and Church Road, to come forward with development proposals for the brownfield site, following which discussions are now taking place with the its Planning Team. Planning permission, which has now expired, was granted to construct a hotel, restaurants and retail units on the site before the 2008 financial crisis, however this proposal fell through and the site was sold to its current owners. Following the subsequent granting of Conservation Area Consent the derelict cinema has been demolished leaving the site vacant without further development proposals until recent talks began. The site has been allocated for ground floor retail use alongside residential, hotel and conferencing uses, in the Submission Daft Site Allocations DPD.
- An extension to the existing Royal Victoria Place was approved in March 2016. The will involve the provision of 140,000 sq.ft of new retail, food and beverage and a 30,000 sq.ft cinema. The corner of Calverley Road and Camden Road will be redeveloped with new buildings and a new entrance. The former Friendly Society building on Camden Road will be totally refurbished, retaining its original features.

Orpington

- **Venuescore Retail Ranking: 290**
- **Trade draw from survey area: £129.5m**

4.11 The Experian Goad category report for Orpington (April 2015) identifies a total of 34,188 square metres of ground floorspace for retail and service units, comprising 270 with 36 units vacant. Venuescore ranks Orpington in 290th position in its 2014-15 Index. Venuescore identify the 'market position' of Orpington as being 'lower middle', suggesting that it has a lower quality retail offer. Retail provision in Orpington is centred upon the Walnuts Shopping Centre off of the High Street, which provides convenience and some lower end comparison multiples like Wilkinson, Argos, M&Co, Peacocks, Poundland, 99p Stores and WH Smith, in addition to independents and eateries like Bella Italia, Creams and Dean's Dinner. The centre also includes an Odeon cinema and adjoins a new library, market space, Sainsbury's foodstore, Orpington College and Walnuts Leisure Centre. A new Premier Inn is also opening soon. Orpington High Street also includes a variety of independent and some other key multiples; however form an offer aimed mainly at local needs.

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Out of Centre Retail in Orpington

4.12 Nugent Retail Park in Orpington is a retail park with some major comparison 'high street' retail names often not found outside town centres rather than supermarkets and bulky goods outlets. It is anchored by Debenhams and features Clarks, Cotswold Outdoors, Game, Early Learning Centre, Waterstones, Marks & Spencer, Next, Laura Ashley, Maplin, Hobbycraft, Mothercare, Pets at Home and others, alongside Nandos, Costa Coffee and Pizza 1889. Across the road there are also two other retail warehousing units – Magnet, Carpet Right and TK Maxx. The 2,200 sq.m Orpington Retail Park, also accommodates a branch of Sports Direct and Dreams such as nearby Springvale Retail Park includes more conventional 'bulky goods' retailers featuring Currys PC World, Furniture Village, Wren Kitchens & Bathrooms, Harveys, Bensons for Beds and Paul Simon.

Dartford

- **Venuescore Retail Ranking: 261**
- **Trade draw from survey area: £85.4m**

4.13 The Experian Goad category report for Dartford (April 2015) identifies a total of 38,266 square metres of ground floorspace for retail and service units, comprising 344 units of which 65 were vacant. Venuescore ranks Dartford in 261st position in its 2014-15 Index. Venuescore identify the 'market position' of Dartford as being 'lower Middle'. Dartford performs in line with the national average for comparison retail, however underperforms, suggesting its retail offer is towards the down market end relatively compared to other centres of similar size and catchment with strong competition from nearby from Bluewater and Lakeside and underperforms in convenience retail provision compared to the national average. Dartford does however benefit from excellent connectivity close to the M25 (approximately 5 miles from Swanley) and with fast rail links into London and Kent.

4.14 The opening of Bluewater in 1999 had a major positive impact on job creation and retail provision in the district more broadly, however compounded decline in Dartford town centre's retail offer, with cheaper stores such as Primark, Wilkinson and Aldi not on offer at Bluewater replacing higher order retailers. The withdrawal of Tesco from developing a new major store in Dartford in January 2015 due to its own financial difficulties have held back retail led regeneration in the town, with a large parcel of land purchased and assembled for the development still left derelict in Lowford Road. Tesco has since sold all its surplus land holdings where new stores will now not be developed to developer Meyer Bergman, who are now beginning discussions with Dartford planning officers.

4.15 However, Dartford does retain two shopping centres, which are now moving positively forward (see below). The Priory has evolved to offer a mixture of lower end comparison and convenience multiples like Poundland and Wilkinson, eateries and takeaways, independent retailers and retail service providers, alongside a Sainsbury's supermarket. The Orchards Shopping Centre is anchored by Primark and Aldi, and also provides a mixture of convenience and some comparison multiples including New Look, Peacocks and Carphone Warehouse in addition to a number of independent businesses. Further retail and services extends along the historic high street and surrounding streets, where markets take place on Thursday and Saturday. Leisure provision in Dartford includes the successful Orchards Theatre, community arts facility The Mick Jagger Centre and Dartford Borough Museum.

Out of Centre Retail in Dartford

4.16 Prospect Place is a major retail park on the edge of Dartford town centre which includes Asda Living, B&Q, Bathstore, Bensons for Beds, Carpet Right, M&S Simply Food, Matalan, Next Home, ScS and TK Maxx alongside Pizza Hut and Costa Coffee and can be expected to be a key competitor to the town centre. The smaller Dartford Heath Retail Park, Heath Lane provides a Dunelm, Jollyes and Halfords. Tower Hill Retail Park (located on the outskirts of Dartford, within the London Borough of Bexley) is a large retail park featuring a Hobbycraft, Currys PC World, Sports Direct, and Greggs.

Planned Development

4.17 Dartford Borough Council has worked with local businesses to establish a Town Team which has produced a High Street Revival Plan for Dartford with the objective of not competing with Bluewater's regional comparison offer but to develop Dartford's USP as a historic market town with a locally focused offer, supporting the survival and growth of small retail businesses, markets and events in partnership with the community. They recognise the need to tackle littering, anti-social behaviour and the cost of car parking, and support the opportunity for residential development in the outlying town centre streets to improve vitality. The third phase of the refurbishment of the Orchards Shopping Centre has just been completed, with the vacant Waitrose store being converted into three smaller units to be occupied by a gym, Aldi and Poundworld. The Priory Shopping Centre has also just been purchased for £30 million by Ellandi, who plan to bring forward further investment.

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Bromley

- **Venuescore Retail Ranking: 39**
- **Trade draw from survey area: £69.9m**

4.18 Bromley town centre, recognised as a metropolitan centre in the London Plan, is located in the south east London Borough of Bromley. Venuescore ranks Bromley 39th position in its 2014-15 Index, and identifies the 'market position' of Bromley as being 'Middle'. The Experian Goad category report for Bromley identifies a total of 99,900 sq.m of ground floorspace for retail and service units, comprising 493 outlets. Bromley acts foremost as a comparison goods centre with The Glades shopping centre (now known as intuBromley) built in 1991, forming the centre of the retail offer, anchored by H&M, Debenhams and Marks & Spencer alongside a wide range of multiple stores including high end brands like Apple, Kurt Geiger and Massimo Dutti and a variety of high street brands. The centre has lost two of its anchor department store retailers in recent years including House of Fraser, reducing its appeal to shoppers travelling from longer distances like Sevenoaks.

Planned Development

4.19 The London Borough of Bromley has recently completed phase one of a town centre public realm renewal programme. Works in Bromley North Village – East Street, Market Square and the upper part of the High Street was completed in 2014 at a cost of £5.5 million. Further works are being planned for the rest of the pedestrianized High Street to provide new paving design, seating, lighting and landscaping to improve the visitor experience and attract investment to redevelop surrounding buildings.

4.20 A Public Private Partnership between the London Borough of Bromley and Cathedral Group is currently developing Bromley South Central, a new mixed use residential and leisure quarter. It will include 4900 sq.m of landscaped public square, a 2,700 sq.m multiplex cinema, 2,600 sq.m of cafes and restaurants, a hotel, private and affordable apartments and underground car parking – with a key focus on quality of the public realm and the inclusion of public art.

4.21 LB Bromley has also prepared an Area Action Plan for Bromley town centre, adopted in October 2010 provides wider policies and proposals. There are also very initial proposals being considered by Transport for London for an extension of the Bakerloo Underground line to Bromley Town Centre.

Maidstone

- **Venuescore Retail Ranking: 51**
- **Trade draw from survey area: £60.6m**

4.22 Maidstone is the county town of Kent and is a major centre for the surrounding rural county and smaller towns. Venuescore ranks Maidstone's position as 51st in its 2014-15 Index, and identifies the 'market position' of Maidstone as being 'Middle'. The Experian Goad category report for Maidstone identifies a total of 83,200 sq.m of ground floorspace for retail and service units, comprising 560 outlets. Maidstone acts foremost as a comparison goods centre and performs above average in its provision of comparison outlets, although below average for convenience retail – which is common for more major centres, as we have set out above. Fremlin Walk is the major comparison focused shopping centre featuring around 50 major brands, anchored by House of Fraser and featuring FatFace, Laura Ashley, H&M, River Island, Schuh and Zara. It also features eateries such as Patisserie Valerie, Bills, Pret and Chimichanga.

4.23 A large secondary shopping centre called The Mall provides a wider mix of convenience and comparison retailers including independents to meet more local needs, with brands including Sports Direct, Poundland, The Entertainer, Next and Hawkins Bazaar. Week Street, from which Fremlin Walk can be accessed, is the main pedestrianized shopping street and includes a variety of other independent and multiple retailers – High Street and King Street are two other key shopping streets. Gabriel's Hill, Union Street, Market Buildings and the Royal Star Arcade are all destinations for well-established independent retailers.

4.24 A High Street Regeneration Project was completed by Kent County Council and Maidstone Borough Council from 2012 to 2013 costing £3.1 million. High quality granite paving and street furniture was used in the design to create a pedestrianized environment with only access for buses. Maidstone also has a Town Team, a partnership between Maidstone Borough Council, Maidstone Town Centre Management and local businesses which is engaged in regeneration, culture, events and marketing.

4.25 St Peter's Wharf Retail Park is also situated on the edge of centre next to the River Medway, and includes branches of Wickes, Asda Living, Hobbycraft, TK Maxx and Homebase. Also on the edge of centre next to the River Medway is the successful Lockmeadow Centre, which uniquely combines Maidstone Market with Gravity Trampoline Park, David Lloyd Leisure, Odeon cinema and Hollywood Bowl, alongside eateries Burger King, Fogo Chophouse, Frankie & Benny's, Harry's Kitchen and The Feathers pub.

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Out of Centre Retail in Maidstone

4.26 Maidstone Retail Park, includes Argos Extra and Dunelm Mill. The larger South Aylesford Retail Park comprises 15,000 sq.m of retail floorspace and features Homebase, Harveys, Currys PC World, Smyths Toys, Costa Coffee, M&S Simply Food and Oak Furnature Land, adjacent to a 5,016 sq.m Sainsbury's supermarket. London Road Retail Park (7060 sq.m) includes branches of Dreams, Dunelm, Jollyes, Argos and Family Bargains stores.

Summary

- **In this section we have established the key centres which compete for comparison goods expenditure with centres in Sevenoaks District. This has been confirmed through a household telephone survey of shopping patterns, which has been undertaken in support of this study.**

- **Bluewater Shopping Centre and Royal Tunbridge Wells town centre are the two principal competing destinations, claiming £362.5m and £141.1m respectively of comparison goods spending from the survey area which we have defined for the purposes of this study. The Bluewater Shopping Centre is one of the strongest retail locations in the UK and its proximity to the District is such that loss of spending to this location is entirely to be expected. Bluewater contains flagship stores and international retailers which would not typically be expected to locate in centres in the District. Other key competing centres are Orpington, Dartford, Bromley and Maidstone, although these do not all draw trade from across the entire district, but have a more balanced influence on shopping patterns. We discuss this further later in the report.**

- **Whilst it is not surprising that many residents in Sevenoaks District undertake their spending at larger/higher-order centres surrounding the District, many of these competing centres are advancing plans to further develop and enhance their retail and leisure offer in the short to medium term. These proposals are likely to further influence the shopping patterns of residents in the District and give added impetus to the need for the District's own Town and Service centres – which we review in the following section – develop and enhance their own offer in order to remain diverse, vital and viable, over the course of the Council's new Local Plan period.**

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5. ASSESSMENT OF CENTRES IN SEVENOAKS DISTRICT

5.1 In this section, we define the role and function of current shopping provision in the Town and Service Centres in Sevenoaks District. Our assessment focuses on the Principal Town Centre of Sevenoaks, the Secondary Town Centre of Swanley, the Rural Service Centre of Edenbridge and the Local Service Centres of Westerham, New Ash Green and Otford, (as defined in the adopted Sevenoaks Core Strategy). We also review the out-of-centre retail provision in the District. Finally, we undertake a high level analysis of provision of the network of Local Service Centres across Sevenoaks, to establish the extent to which they are currently meeting the day-to-day shopping needs of their local communities — this exercise is shown in **Table 5.1**.

5.2 Following this, we set out summaries of the performance of the Town and Service Centres in the District against the 'health check' indicators which National Planning Practice Guidance states should be used to access the vitality and viability of town centres.

5.3 Table 5.1 shows key statistics for the centres in Sevenoaks District in terms of number of units, total comparison goods floorspace and Venuescore rankings and market position data. This information is also provided for the key surrounding competing centres, building on the analysis set out in the previous sections.

Table 5.1: Statistics for centres in Sevenoaks District and key competing centres

Centre	Position in Sevenoaks Retail Hierarchy	Total number of units	Total comparison floorspace (sq.m net, estimated)	Venuescore Retail Ranking 2014-15	Venuescore Market Position 2014-15
Centres in Sevenoaks					
Sevenoaks	Principal Town	230	12,839	388	Upper Middle
Swanley	Secondary Town	86	4,747	1,096	Lower
Edenbridge	Rural Service Centre	89	2,583	2,306	Upper Middle
Westerham	Local Service Centre	72	2,861	-	-
New Ash Green	Local Service Centre	-	-	-	-
Otford	Local Service Centre	-	-	-	-
Competing Centres					
Bluewater	-	340	155,7011	26	Upper Middle
Royal Tunbridge Wells	-	696	65,635	243	Upper Middle
Orpington	-	270	34,188	290	Lower Middle
Dartford	-	344	38,266	261	Middle
Bromley	-	493	99,898	290	Upper Middle
Maidstone	-	560	83,231	51	Middle

Source: Sevenoaks Core Strategy (2011)/Experian Goad Category Reports/Venuescore 2014

Sevenoaks (principal town centre)

5.4 Sevenoaks is the highest order town centre within Sevenoaks District. It is a historic and cultural market town with a strong mix of shopping, leisure and service uses. Sevenoaks is approximately 14 miles from Royal Tunbridge Wells, 17 miles from Dartford and Bluewater and 30 miles from Central London. Sevenoaks has a Venuescore of 388 in the 2014 rankings and is identified as providing a 'upper middle' retail offer. Examples of similarly ranked centres in the South East include Bognor Regis, Fleet, Dorking and Petersfield.

Diversity of uses and retailer representation

5.5 The focus of the retail offer in Sevenoaks is centred upon Bligh's Meadow, London Road and the High Street which form a triangle in the centre of Sevenoaks, with a number of small roads and alleyways connecting the main shopping areas. Uses are generally spread throughout the centre, with no clearly identifiable 'quarters' within the town centre. National retailers are found mainly on the High Street with independent retailers focussed on London Road.

5.6 Food and beverage outlets are well distributed throughout the centre. In terms of the quality of the food and beverage offer, there are a range of coffee shops including Costa and Caffé Nero, a café within Marks and Spencer, and one within Waitrose in addition to a good range of independents. In terms of restaurants there is a good range of higher quality national chains including Cote Brassiere, and Loch Fyne, again supported by a good independent offer. There is also a strong mid-range restaurant offer, with national chains such as Wagamama, Pizza Express, Prezzo and Zizzi located within the centre. A new Nando's restaurant is opening in Bligh's Meadow later this year.

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5.7 In terms of the fashion retail offer within Sevenoaks town centre, there are a number of higher quality fashion retailers including Crew Clothing, Fat Face, Mint Velvet and Phase Eight. The main fashion retailer within the centre is Marks and Spencer other retailers present in centre include; M&Co, White Stuff, Monsoon and Laura Ashley, The centre is lacking mens fashion retailers. In addition to fashion, Sevenoaks has a good homeware offer for the size of the centre, with a number of outlets such as Robert Dyas, Leicht, Waitrose home and The Hardware Centre.

Sevenoaks town centre

5.8 Sevenoaks is not overly dominated by charity shops, there are a few on the High Street such as Cancer Research, The Children's Trust and Oxfam, however these appear to contribute positively to the High Street, with relatively attractive shop fronts.

5.9 Sevenoaks has retained a good representation of services. Estate Agents are well distributed throughout the town centre; there is also a good range of banks located within the town centre, with Natwest, HSBC, Barclays, Nationwide and Halifax all with centre branches in centre.

5.10 In terms of food stores, Sevenoaks has a large Waitrose store (2,208 sq.m net) located off the High Street, with fish, cheese, delicatessen, olive, rotisserie, butcher and bakery counters. The Waitrose store has a dedicated kitchen/homewares shop, in store café and its own car park. The store also offers additional services such as glass and fish kettle loan and dry cleaning and laundry services.

5.11 The other major town centre food store is the Tesco Metro (1,897 sq.m) located on High Street. This is a relatively large format Tesco Metro with a small clothing range which occupies the entire width of the store's frontage to the High Street. Marks and Spencer also has a food hall. There are a small number of other food outlets within Sevenoaks including Cook, and health food stores.

5.12 In terms of leisure, the offer within Sevenoaks appears proportionate to the size of the centre. Whilst the night time economy was not assessed as part of this study, it could be assumed, that it is relatively strong, given the number of public house and restaurants that are distributed throughout the centre. The Stag Cinema is a community arts centre, cinema, theatre and live entertainment which includes two digital screens and shows new releases. However, there is not a solely dedicated cinema facility located within Sevenoaks town centre, and this represents a gap in the purpose built offer of the centre.

Vacancy Rates

5.13 The Experian Goad Category Report for Sevenoaks (June 2015) identifies the centre as having a vacancy rate of 7.8%[3], below the current national average of 11.2%. There are no concentrations of vacant units within the centre. Experian data (June 2015) suggests that there is a total of 1,858 sq.m vacant floorspace within the town centre, of an estimated 41,313 sq. m of floorspace, equivalent to 4.4% of the floorspace in the centre. Again, this total is below the current UK average of 11.2%.

Customer's views and behaviour

5.14 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research in June 2016. The survey was undertaken in three different locations (between Wagamama and Tesco Metro on High Street, Bligh's Meadow (Laura Ashley area) and Halifax/Lloyds Bank/Chequers Pub (High Street area) within Sevenoaks town centre with a sample size of 100. The key findings from this exercise were as follows:

[3] Based on the Experian Goad definition of the town centre boundary. It should be noted that these boundaries do not always reflect local planning policy boundaries.

- The survey found that 95.0% of visitors to Sevenoaks come from home.
- There is a good mix of activities being undertaken within the town centre including food shopping (37.0%), non-food shopping (33.0%), general browsing (15.0%) and those that work within the area (18.0%).
- The main stores visited include Tesco (45.8%), Marks and Spencer (27.1%), Waitrose (18.6%) and Boots (11.9%),
- In terms of car parking, Bligh's Meadow is the most popular choice with 22% of respondents stating that they parked here. When questioned regarding whether they could park in their preferred car park, 68.4% stated that they could park in their preferred location, suggesting that provision is, for the most part, adequate.
- When questioned about what they liked about the town centre, 28.0% stated that they liked the attractive/pleasant environment in Sevenoaks town centre, whilst 24.0% stated that they liked Sevenoaks because it is close to home. Other aspects of the town centre which scored highly include the good layout/shops being close together (11.0%), good range of smaller independent specialist retailers (11.0%), good quality shops (11.0%) and the centre having good places to eat (11.0%).
- In terms of dislikes about the town centre, very positively 49.0% of respondents stated very little, with a further 22% stating the cost of parking. A further 9.0% stated traffic congestion and 4% a lack of parking. The above findings suggest generally high levels of satisfaction with the town centre amongst its users.
- Looking to what respondents felt could be improved in the town centre, again, positively, 34.0% stated nothing in particular, whilst 11.0% stated a better choice of shops. A further 9.0% stated that they didn't know what could be improved within the centre, with a further 6% stating that there was no need to improve the centre and 8.0% stated that there needed to be more car parking in Sevenoaks town centre. Again, the relatively low percentage identified here indicates that most users of the centre are satisfied.

Pedestrian flows

5.15 The highest pedestrian flows were observed within the lower levels of Bligh's Meadow development (specifically the Marks and Spencer end of the development) and a number of the side streets which run between London Road and the High Street. The lowest pedestrian flows were observed on London Road; this may have been due to the time of day of the site visit and the nature of the offer on this side of the town centre being mostly centred upon less well-known brands, and a number of restaurants/evening economy use.

Accessibility

5.16 Sevenoaks town centre is relatively constrained due to its development between London Road and the High Street. As a consequence car parking is limited within the town centre to Bligh's Meadow, the Leisure Centre, Buckhurst Car Park and Waitrose. Whilst the town centre is relatively accessible, it would appear that at peak times it suffers from congestion on the main arteries from the A25 (London Road and A225).

5.17 Sevenoaks town centre is approximately a 15 minute walk from the train station, however the route is easily navigable as it follows London Road. There is scope to improve directional sign posting between the station and town centre.

5.18 The town centre is well served by buses, with the bus interchange located on Buckhurst Lane, off the High Street in Sevenoaks town centre. The town centre is served by ten bus routes. Buses provide connections to the surrounding urban area, as well as nearby centres such as Tonbridge, Bluewater (evening service only), Kemsing, Westerham and Farningham.

Perception of safety and occurrence of crime

5.19 The town centre is well integrated with the rest of the town; there is an element of residential use within the centre and its immediate surroundings. The town centre is well maintained, and there is no feeling within the centre that it particularly needs investment, or that there are pockets with poor natural surveillance that attract crime or anti-social behaviour, at least during daylight hours.

State of town centre environmental quality

5.20 Sevenoaks is a historic town centre, and as such the street design and layout reflects the age of the town centre. Much of the town centre is located within the Sevenoaks High Street Conservation Area. Pavement widths, particularly on London Road are quite narrow, reflective of the age of the town centre. The attractive triangular space between London Road, Bligh's Meadow and the High Street acts as a pedestrianised centre. The pavement width on the High Street is wider in most places than that on London Road, and feels more accessible.

5.21 The environmental quality of the town centre is good, there are a number of attractive shop fronts, and hanging baskets distributed throughout the town centre. The town centre would benefit from a more unified approach to the public realm – the approach to paving has not been consistent throughout the town centre, neither has the approach to street furniture and bollards. Bligh's Meadow currently feels slightly disjointed from the rest of the town centre, mainly due to the development being centred around the car park.

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Swanley (secondary town centre)

5.22 Swanley is the secondary town in Sevenoaks District and is located close to the edge of Greater London, in close proximity to Dartford (approximately 5 miles away). Swanley is ranked in 1,096th position in the Venuescore Retail Rankings (2015), with a 'lower' market position, indicating that the overall quality of the retail offer is relatively downmarket.

5.23 One of the largest land owners in Swanley, U+I PLC have recently submitted a planning application for the redevelopment of Swanley Square, which forms the principle shopping area of Swanley town centre. The proposed redevelopment will be a phased redevelopment of part of the Swanley Shopping Centre to provide 340 residential units and 4, 346 sq.m retail floorspace. The application is under determination at the time of writing.

Swanley Square Shopping Centre

Diversity of Uses and Retailer Representation

5.24 As noted above, the focus of the retail offer in Swanley is centred upon Swanley Square. This is a purpose built, pedestrianised 1960's shopping centre. There is a further retail offer on High Street and Station Road, however, the quality of this diminishes from that of Swanley Square, and it feels detached from its main pedestrianised centre.

5.25 Anchored by a large Asda store (5,460 sq. m net), the Swanley Square has a good range of lower quality retailers including Wilko, the Card Factory, Poundland, Superdrug and Iceland. The centre also offers banks, chemists and a range of food and beverage outlets most fast food and hot food takeaways. There is also an Aldi (650 sq.m), located slightly outside of the Swanley Square. Swanley also has an outdoor market held within Swanley Square every Wednesday between 8am- 3pm. The retail offer on High Street and Station Road is largely dominated by take-aways and beauty salons, and is for the most part poor quality.

Vacancy Rates

5.26 Experian Goad data suggests that Swanley has a low vacancy rate at 2.3%, 8.9% below the national average of 11.2% (Goad, September 2015). There are no concentrations of vacant floorspace, of the total floorspace in Swanley (24,712 sq.m), there was only 241 sq.m vacant at the time of the Experian Goad survey. Our own conclusions from visiting the centre suggest that the vacancy rate remains low.

Customer's views and behaviours

5.27 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in two different locations (Costa/Swanley Square/Asda entrance area, and High Street) within Swanley town centre with a sample size of 50. The key findings from this survey were as follows:

- The in centre survey results for Swanley indicate that the majority of respondents visit the centre from home (96.0%), with 4.0% visiting from work.
- It would appear that the main draw is Asda, with 80.0% of respondents stating that the main purpose of their visit to Swanley was for food shopping. 38.0% of respondents stated that their main purpose for visiting the centre was for non-food shopping, 16.0% for general browsing and 14% for financial services.
- A core of five stores provide the main draw for Swanley with 85.7% of respondents stating that they would visit Asda, 21.4% Wilkinsons, 16.7% Poundland, 9.5% Iceland and 7.1% Aldi during their visit to the centre.

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- The majority of visitors arrive at the most popular centre via car/van as the driver (66.0%) with 22.0% arriving on foot. Asda has the most popular car park; with 87.9% of visitors in Swanley using this car park our own observations confirmed this car park to be noticeably busy at the time of our visit. 72.7% of respondents could park in their preferred car park.
- In terms of what respondents like about the town centre, 34.0% of respondents stated that they liked that Swanley was located close to home, followed by 26.0% stating that it was compact/easy to get around. 20.0% of respondents stated that they liked the layout of the centre and that the shops were close together. 22.0% of respondents stated that they like shopping in Swanley because it is easy to park, with a further 14.0% of respondents stating that they liked the markets held at Swanley.
- In terms of dislikes, 32.0% of respondents stated that they disliked nothing/very little about the centre, whilst 22.0% stated that there are not enough shops in Swanley. 16.0% of respondents stated that they disliked the amount of litter within the centre, and that it was dirty, with a further 10.0% mentioning vandals and hooligans. 10% of respondents stated that there are not enough clothes shops in Swanley. Accordingly, these represent areas for potential qualitative improvements in the centre.
- When making suggestions for improvements, 34.0% stated nothing. 22.0% of respondents stated that it would be improved by a better choice of shops, with 6.0% of respondents stating that the centre would benefit from larger shops and department stores, with another 6.0% suggesting that Swanley could be improved from better maintenance/cleanliness and more pubs and restaurants respectively.

Pedestrian Flows

5.28 The health check was undertaken on a Wednesday, on market day. Pedestrian footfall observed indicated that the centre was crowded and the shops appeared to be busy. We have however also undertaken visits to the centre on a non-market day and there is a noticeably reduced level of activity. We are not aware of any footfall data for the centre. It is clear that the market makes an important contribution to the vitality and viability of the centre and is a major driver of footfall, Footfall around the entrances to Asda was also found to be strong, reflecting the store's role as the clear anchor store within the centre.

Accessibility

5.29 Swanley is well connected to the surrounding area via the A20 and M25, however it is clear that the centre suffers from parking issues, particularly on market day, within the Asda car park. This is most likely due to free parking being available within the Asda car park, with the Swanley Shopping Centre Car Park also being relatively cheap for short stay at 25p per hour. A more coordinated approach to parking across the centre which allows for free short –stay parking (up to one hour) might be beneficial.

5.30 The location of bus stops was reviewed as part of the health check – Swanley is served by buses from locations such as Tonbridge, Bluewater, Eltham, Dartford, Gravesend, Maidstone, Sidcup and Orpington. The centre is well served by rail connections, with Swanley station being located within a 10 minute walk of the town centre, connecting to Sevenoaks, Canterbury (via Maidstone East and Ashford), and Central London.

Perception of safety and occurrence of crime

5.31 Following the review of the in centre survey results, it is clear that crime and anti-social behaviour within the Swanley Shopping Centre is of concern to visitors, this particularly appears to be an issue in the Swanley Centre. As the shopping centre dates from the 1960's and is rather inward facing and lacks natural surveillance, which could be an issue at night.

State of town centre environmental quality

5.32 It is clear that particularly on market day, litter is a problem within the centre. Additionally, the market makes legibility within the centre problematic and restricts pedestrian flows. This said the market appears to be a significant footfall driver. Due to the age of the centre, the environmental quality is relatively harsh in nature and could be softened through urban greening and improvements to the design of the public realm, and the Council should seek to ensure improvements to this as part of any redevelopment of the centre.

Edenbridge (rural service centre)

5.33 Edenbridge is identified as a rural service centre within the Sevenoaks Core Strategy (2011), and is the main centre in the south of the District. The centre is a small, traditional linear town centre, focused mainly upon the High Street. In the 2014 Venuescore rankings, Edenbridge was ranked in 2,306th position, with a market position classification of 'upper middle', suggesting it has a high quality retail offer.

Diversity of uses and retailer representation

5.34 Edenbridge has a good range of services for the size of the settlement. Whilst it would appear that a number of banks have closed in recent years, the centre has retained a Lloyds Bank branch. There are a number of public houses, a post office and some charity shops located within the centre. There are a number of antiques shops, particularly located around Church

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Street. The centre is lacking in its range of comparison goods offer but this reflects the relatively small size of the centre.

5.35 In terms of convenience goods, there is a Tesco Express (412 sq.m) located off High Street, and a medium sized Waitrose (1,151 sq.m) whilst being disconnected from the centre, appears to act as the 'anchor store'. It is also noteworthy that the store provides 2 hours free parking.

Vacancy Rates

5.36 The most recent Experian Goad Survey of Edenbridge town centre was undertaken in December 2013. At the time of the Experian Goad Survey, the vacancy rate was identified as being 14.6% above the national average of 11.2%. Positively it would appear that subsequent a number of units identified as vacant on the Goad Plans (December 2013) have since been filled where existing businesses have expanded into adjacent vacant units.

Customer views and behaviour

5.37 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS market research in the centre in June 2016. The survey was undertaken in two different locations within Edenbridge town centre (Waitrose and outside Tesco Express on the High Street) with a sample size of 50. The key findings from the survey are as follows:

- 84.0% of respondents stated that they visited the town centre from home, whilst 12.0% of respondents stated that they visited the centre from work, with 4% having visited the centre from friends/family homes.
- With regards to the purpose of the visit to the town centre, 66.0% of respondents stated that they were visiting the centre to undertake food shopping, 26.0% to undertake non-food shopping, and 18.0% general browsing. Reflective of the food and beverage offer within the centre, 10% of respondents stated that their main purpose was to go to a café/restaurant, whilst 12% stated that they worked within Edenbridge.
- In terms of the main stores which visitors to the centre were planning to use, 44.4% of respondents stated that they were visiting Waitrose, 41.7% stated Tesco, 11.1% stated the Post Office, and 22.2% stated Boots. This confirms the important role the supermarkets play as an attraction of footfall.
- With regards to parking, 79.3% of respondents could park in their preferred car park.
- Turning to likes and dislikes, 18% of respondents stated that they liked the attractive and pleasant environment in Edenbridge, 16.0% stated nothing/very little. 8.0% of respondents stated that they liked the free/cheap parking, with a further 6% stating a good range of smaller independent/specialist retailers. 22.0% of respondents stated that they did not think that there was a big enough choice of shops, whilst 18.0% stated nothing/very little.

Edenbridge town centre

Pedestrian flows

5.38 In terms of pedestrian flows, the health check was undertaken mid-morning, which may have impacted upon observations. The High Street itself appeared relatively quiet, although towards midday the centre became significantly busier appearing to attract passing trade. This was particularly true of observations at the Waitrose store. The highest levels of footfall were observed in the vicinity of the Waitrose store, confirming the role of this store (along with the smaller Tesco Express) as the centre's anchor.

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Accessibility

5.39 Edenbridge is centred upon the High Street which is on the B2026. As the centre is a linear settlement there is not much on street parking. There is however a good level of parking provision within the Waitrose car park, which is free for 2 hours regardless as to whether the car driver is a Waitrose customer. As this car park appears to provide the majority of the car parking within the centre, links could be improved through a walkway from the High Street.

5.40 In terms of public transport, Edenbridge town centre is a short walk from the train station. The centre is served by buses that go to Tonbridge, Royal Tunbridge Wells, Oxted, East Grinstead, Sevenoaks and Hever.

Perception of safety and occurrence of crime

5.41 As Edenbridge is a linear centre, it has good natural surveillance. There are a few side streets, however again these appear to be adjoining residential properties. There are no signs of graffiti or vandalism.

State of town centre environmental quality

5.42 Edenbridge is a historic centre, with a number of attractive buildings. The centre could benefit from some improvements to shop fronts, however, most are in generally good repair. The centre could also benefit from more planting, and unified street furniture, a number of food and beverage operators have outside eating areas, which could be developed more to create a 'café culture' environment.

Otford (local service centre)

5.43 Otford is identified as being a local service centre within the Sevenoaks Core Strategy (2011). It is a historic and attractive village centred upon an attractive duck pond.

Diversity of uses and retailer representation

5.44 The centre has a good food and beverage offering in the form of café and tea rooms and public houses. For the size of the settlement there is a relatively limited convenience offer, however this may be due to the close proximity of a large Sainsbury's (on Otford Road approximately 1 mile from the centre, on the edge of Sevenoaks urban area. Having said this there is still a post office, pharmacy and One Stop convenience store located within the centre.

5.45 There are a number of antique shops located within Otford, in a similar way to Edenbridge, there is potential for the specialist offer of vintage/antique goods in Otford to be developed. There are also a few boutique/fashion retailers within the centre. The retail offer is good in terms of specialist items, but lacking in day to day items. Otford has retained a Post Office, but is lacking in other services such as banks.

Customer's views and behaviours

5.46 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within Otford town centre with a sample size of 25. The key findings from the survey are as follows:

- The purpose of the visit to the centre ranged from 32.0% visiting to undertake food shopping, 12.0% undertaking non-food shopping, and 36% using financial services.
- The main stores respondents had visited include Post Office (45.5%), Charity Shops (27.3%), and Lloyds Bank (9.1%).
- In terms of how respondents travelled to the centre, 56.0% arrived by car, 8.0% cycled and 36.0% walked. Of those respondents who parked within the centre, 78.6% of respondents parked on Sevenoaks Road, 14.3% on the High Street, and 7.1% in the Warham Road Car Park. Respondents stated that they parked in their preferred car park, indicating that car parking provision in the centre is likely to be sufficient.
- Turning to what respondents liked about the centre, 68.0% of respondents stated that they liked the attractive and pleasant environment within the centre, 24% stated that it was easily accessible on foot/or by bike. 20% stated everything and 20% stated the historic environment.
- In terms of dislikes, 56% stated nothing/very little 12.0% traffic congestion, 12.0% lack of parking, 16.0% stated that it was difficult to cross the street and 12.0% stated that there were few traffic free areas.
- Positively, 56.0% of respondents stated that there was nothing that could be improved within the centre, 12.0% stated that the centre would benefit from more car parking, with a further 8.0% stating that the centre would benefit from more traffic free areas. Levels of satisfaction amongst users of the centre are therefore for the most part quite high when considering the locations role and function which the centre plays.

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Otford

Vacancy Rates

5.47 There is not any Experian Goad data available relating to vacancy rates in Otford. A vacancy check was undertaken as part of the health check visit, and no units were found to be vacant.

Pedestrian Flows

5.48 There appeared to be a constant flow of visitors parking in Otford Village Car Park. There also appeared to be a good flow of people going to the food and beverage outlets in the centre. For the size of the centre, we consider pedestrian flows to be generally good.

Accessibility

5.49 Otford has good amenities, centred upon a cricket club, childrens play park, tennis courts and grass area, where there is a large car park with free parking for an hour. The centre is within close proximity to Sevenoaks, located off the A225. Otford train station is located within a 10 minute walk of the village centre. The centre is served by buses that go to destinations including East Grinstead, Reigate, Oxted, Caterham, Westerham and Biggin Hill.

Perception of safety and occurrence of crime

5.50 Due to the linear nature of the centre, it would appear that the centre is relatively safe and that the occurrence of crime is low. It is possible that the area around the Post Office may be more susceptible to crime, as natural surveillance is rather low in comparison to other areas of the town centre.

State of town centre environmental quality

5.51 Otford is an attractive, historic centre. The row of shops including the Post Office appears to be a more modern addition to the centre. A main road bisects the centre, meaning that accessibility between the two sides of the road is quite difficult. Additionally the pavement is quite narrow in places meaning that pedestrian comfort is limited.

Westerham (local service centre)

5.52 Westerham is identified as being a Local Service Centre in the Sevenoaks Core Strategy. Westerham is recorded as early as the 9th Century and is known for being the largest settlement within close proximity to Chartwell, the principle residence of Sir Winston Churchill.

Diversity of uses and retailer representation

5.53 Westerham's convenience goods offer comprises the Co-op, a small branch of Nisa and Westerham Village Stores and a number of smaller independent stores such as greengrocers and butchers. The comparison goods offer in Westerham is largely centred upon independent fashion retailers, interior design companies and gift shops and there are no national comparison goods retailers present in the centre. Its retail offer is therefore relatively specialist, which helps the centre to have a relatively unique feel and sets it apart from some the higher order centres.

5.54 In terms of the food and beverage offer in Westerham, this is centred upon a number of independent tea rooms in addition to a branch of Costa. There are also a number of public houses and independent restaurants located within the centre. The food and beverage offer of the centre is clearly a big attraction of the centre, with 28.0% of respondents stating that they had visited a café/restaurant for lunch in the in centre survey (discussed below further) – the most popular reason for visiting the centre.

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Customer's views and behaviours

5.55 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within Westerham town centre with a sample size of 25. The key findings from the survey are as follows:

- The in centre survey indicates that the majority of visitors to the centre come from home, with 96.0% of respondents stating this, with 4.0% travelling from work.
- The most popular responses to the question regarding the main purpose of the visit to Westerham varies from going to cafes/restaurants for lunch (28.0%), non-food shopping (24.0%) and food shopping (24.0%).
- The main stores visited within the centre range from the Co-op (27.3%), Fringe Benefits (hairdressers) (9.1%), Nisa (54.5%) and The Chocolate Shop (9.1%).
- In terms of how they travelled to the centre, 40.0% of respondents indicated that they had driven by car to the centre, 16.0% as a car passenger, and 44.0% of respondents walked to the centre. There were a range of locations for car parking, with 14.3% of respondents parking with friends and family, 21.4% of respondents using the Lower Car Park, 42.9% of respondents using on street parking, 14.3% of respondents using the Vicarage Hall Car Park and 7.1% getting dropped off at the centre. 84.6% of respondents stated that they parked in their preferred car park, with a further 15.4% of respondents stating that they did not have a preferred car park.
- With regards to what respondents liked about the centre, 20.0% stated that they liked that it was close to home, with 48.0% stating that it was an attractive and pleasant environment. 16.0% of respondents stated that the centre was compact/easy to get around, another 16.0% stated that there was a good layout, and a further 16% stated that they liked that there were good quality shops. These are all positive reflections of the vitality and viability of the centre and suggest many local residents enjoy the experience of visiting the centre.
- Turning to dislikes, 32.0% of respondents stated nothing, 8.0% the cost of parking and 8.0% traffic congestion. A further 16.0% stated that they thought there was a lack of parking, with another 16.0% stated that there was a problem with commercial traffic.

Vacancy rates

5.56 Experian Goad data (September 2014) indicates that the vacancy rate in Westerham is 2.8%, well below the national average of 11.2%. No vacant units were noted during our visit to the centre.

Pedestrian flows

5.57 The centre appeared to be very quiet during the health check visit; however, this could have been due to the time of day of the visit and weather. The centre is an easily accessible size, and easy to navigate around for pedestrians.

Accessibility

5.58 The centre is not particularly easy to access with limited on street car parking. There is however a large car park off Brasted Road, which is a short walk from the centre of Westerham. Westerham is accessible from the M25, however it doesn't have a train station. Buses that service the centre include destinations such as Tonbridge, East Grinstead, Sevenoaks, Redhill and Oxted.

Westerham

Perception of safety and occurrence of crime

5.59 The centre is largely a linear centre and as such benefits from good levels of natural surveillance.

State of town centre environmental quality

5.60 Nearly 50% of respondents to the in centre survey stated that they liked the environmental quality of the centre. The state of the town centre is good, however there is room for improvement. A more unified public realm strategy would improve the centre aesthetically, although the central green is an attractive space at present. Coordinated benches, street lamps and bollards could further improve the environmental quality of the centre.

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New Ash Green (local service centre)

5.61 New Ash Green is a purpose built 1960's shopping centre – it was an innovative development project for its time, however it would appear to have suffered from lack of investment in recent years and the centre now suffers from a generally poor environmental quality. New Ash Green is identified as being a Local Service Centre within the Core Strategy.

New Ash Green Village Centre

Diversity of uses and retailer representation

5.62 The retail offer in New Ash Green is mainly convenience based with a good sized Co-op anchoring the centre. The centre has a Lloyds Bank branch, Vintage Barn (gift shop) and Post Office. In terms of a food and beverage offer, the centre has a number of cafes, take aways and a public house.

Customer's views and behaviours

5.63 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within New Ash Green town centre with a sample size of 25. The key findings from the surveys were that:

- In terms of reasons why respondents were visiting the centre, 80.0% were planning to undertake food shopping, 24.0% non-food shopping (presumably gift shopping), 8.0% financial, and a further 8.0% visiting the leisure centre. The main stores visited amongst respondents include the chemist (5.0%), the Co-op (90.0%), Oxfam (10.0%) and the Pet Pantry (15.0%).
- 64.0% of respondents stated that they all travelled to the centre as a car driver, with 36.0% stating that they arrived on foot. 100.0% of those who drove to the centre stated that they used the Centre Road Car Park, which was their preferred car park.
- In terms of what respondents like about the centre, 60.0% stated that it was close to home, 12.0% stated nothing/very little. The next most popular responses included easy to park (8.0%), good quality shops (8.0%), not too busy (8.0%), clean/litter free (8.0%), everything I need is here (8.0%), and good leisure facilities (8.0%).
- Turning to dislikes, 52.0% stated that the centre was run down, 24.0% stated that they felt as though it was unsafe/dangerous, 24.0% stated that they felt that there were not enough shops, and a further 24.0% stated that there was litter/dirty/dogs problem. These are the highest levels of dissatisfaction observed of any of the centres within Sevenoaks District and point to a number of areas where improvement in the centre is clearly required.
- It is clear that there are suggestions as to how the centre could be improved, 24.0% of respondents stated that there could be a better range of shops, with a further 24% suggesting that the entire centre should be refurbished. 16.0% stated that security should be improved within the centre, 12.0% stated better youth facilities, 12.0% stated better maintenance/cleanliness, and a further 12.0% stated that they felt that the centre would be improved if there were local landlords. Again, this points to a clear need to improve a number of aspects of the centre in order to improve its attractiveness to and satisfaction from the local residential community.

Vacancy rates

5.64 Vacancy data is not available from Goad for this centre, so precise vacancy figures cannot be derived. A vacant unit check was undertaken as part of the health check, it would appear that the centre is struggling to retain retailers, as there are a number of vacant units at present – our data would suggest that approximately one third of units are currently vacant.

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Pedestrian flows

5.65 A good level of pedestrian activity was observed within the centre, although this may have been due to the health check being undertaken during the lunchtime period.

Accessibility

5.66 The centre of New Ash Green has largely been designed to cater for the needs of the local community, and as such is not easily accessible by car from anywhere other than New Ash Green. The shopping centre is located within the centre of the village and is inward facing, typical of many 1960's shopping centres.

5.67 New Ash Green is connected to Dartford and Bluewater by the 423 bus, which provides a regular service. There are additionally a number of other services, including Meopham, Gravesend, Borough Green, Sevenoaks and Maidstone. New Ash Green does not have a rail link; however, New Ash Green is located within easy driving distance of Longfield, Meopham and Sole Street Railway Stations.

Perception of safety and occurrence of crime

5.68 Due to the number of vacant units within New Ash Green, the centre does not feel as though it benefits from good levels of natural surveillance. The layout is irregular, and could lend itself to anti-social behaviour, due to the inward nature of the centre. It is clear from reviewing the in centre survey that security within the village centre is a concern – 8.0% of respondents stated that vandals/hooligans were a concern, with a further 8.0% stating that they felt that the centre was unsafe, has poor security and is dangerous. A further 16.0% of respondents stated that gangs of children within the centre were of concern. Further reiterating concerns regarding safety and the occurrence of crime, when suggesting improvements to the centre, 16% of respondents stated that the centre should improve security/improve CCTV. These therefore point to a number of concerns about the safety of the centre from its users and it is agreed that, particularly outside of retail trading hours this may be an area of concern for the centre.

State of town centre environmental quality

5.69 The centre does not appear to be well maintained, a number of the units appear dated. The provision of street furniture could be improved, particularly through increasing the number of bins and benches within the centre. The centre has a good level of planting, giving the centre a sense of being in woodland. The centre would benefit from an aligned public realm strategy. Indeed, it is clear from the results of the in centre survey that many respondents feel that the town centre environmental quality of the centre needs to be improved, with 48% stating that it is run down. In terms of improving the appearance and environment of the centre, 12% of respondents suggested that this is necessary. A further 24% suggested a complete refurbishment of the centre, which it is understood that the Council are currently looking into.

Service Villages & the rural economy

5.70 We have also undertaken a high-level assessment of the next tier of centres in the District's retail hierarchy, which are 'Service Villages' (see Table 2.1 for a full schedule of the network of Service Villages in the District). For these centres we have undertaken a desk-based assessment which considers the presence/availability of 14 key local facilities within each settlement – for example a supermarket/small convenience store, newsagent, post office, pharmacy, ATM, café, public house, take-away, doctors surgery and library – in order to establish the extent to which the Service Villages are meeting local residents' day to day needs.

5.71 At Appendix I (Volume 2) we set out a matrix assessment of the provision of these facilities within each of the Service Villages. The key conclusions from this assessment are:

- The majority of Service Villages have a relatively limited range of facilities, with between 2 and 4 of the 14 key facilities present in any one centre.
- The Service Village with the most facilities is West Kingsdown, where six facilities are present – a small convenience store, a newsagent/off licence, pharmacy, dry cleaners, public house and take-away. The centres of Kemsing and Sundridge have 5 of the 14 key facilities present.
- Some Service Villages are much more poorly provided for, with Leigh having none of the key facilities present and Horton Kirby just one (a public house).
- The centres of Horton Kirby, Leigh and Shoreham do not have any form of local shopping provision, e.g. a small-format convenience store or a newsagent/off licence.

5.72 In addition, there are a number of small farm shops within the area, with the four largest being Chart Farm (Seal Chart), Polhill Farm (Badgers Mount), Stonepitts Farm (Seal Chart) and The Hop Shop (Shoreham).Of these, the Hop Shop appears to be the most destination style location, with the Hop Shop, offering a range of food, gifts and even tours. These locations, whilst not such defined centres, also make an important contribution to the variety of the retail offer available within the district, and can also act as attractions in their own right.

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6. SURVEY AREA, SHOPPING PATTERNS AND POPULATION & EXPENDITURE GROWTH

6.1 In this section we introduce the key inputs which form the basis of our assessment of the 'need' for new comparison and convenience goods retail floorspace in Sevenoaks District. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs below, and the findings are subsequently set out in Sections 7 and 8 (for comparison goods and convenience goods capacity forecasts respectively). The findings of this section should be read in association with the capacity tabulations at Appendix II (for comparison goods) and Appendix III (for convenience goods) in Volume 2.

Calculation of quantitative 'need'

6.2 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. The key stages of the quantitative need assessment are set out in the diagram on the opposite page.

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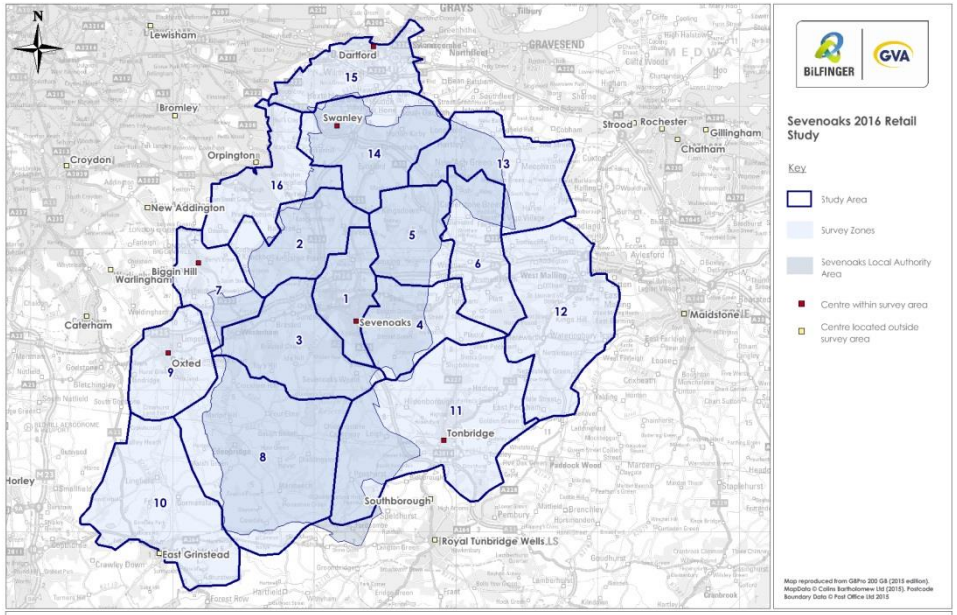
Survey Area and Household Survey

6.3 As noted above, in order to determine the 'need' for new floorspace, a household telephone survey is required to establish the current shopping patterns of residents. In order to determine this, we have established a 'survey area', which covers Sevenoaks District in its entirety, as well as parts of adjacent authorities in instances where these authorities' own evidence base studies have identified that some residents look towards centres in Sevenoaks for some of their shopping needs. A plan of the survey area is shown in **Figure 6.1** (a larger version is reproduced in Volume 2). A total of 1,600 household telephone surveys were undertaken by NEMS Market Research during June 2016. In order for detailed analysis of shopping patterns at the local scale to be undertaken, the overall survey area has been split into sixteen survey zones.

Figure 6.1: Survey area



Study area and household survey zones

6.4 The Sevenoaks District boundary is also shown on Figure 6.1, and it can be seen that zones 1, 2 , 3, 4, 5, 8 and 14 fall wholly or mostly within Sevenoaks District. Survey zone boundaries have been defined by postcode sectors, and each of the Town and District Centres in Sevenoaks is sited within a different zone, as follows:

Zone	Town/District Centre
Zone 1	Sevenoaks
Zone 2	Shoreham
Zone 3	Westerham
Zone 4	Seal
Zone 5	West Kingsdown
Zone 8	Edenbridge
Zone 14	Swanley

6.5 In order to maintain consistency with the Council's previous evidence base studies, the boundaries of the overall survey area, and the subdivision into survey zones, are both unchanged.

Estimates of Population in the Survey Area

6.6 For the purposes of our quantitative needs assessment, we have utilised population forecasts provided by Experian. These are past trends-based population forecasts (applied to Office of National Statistics population and National Population Projections), and are consistent with equivalent inputs into other Local Plan evidence base studies which the Council has commissioned. Table 1 in Appendix II shows the current and projected population for each of the zones which together comprise the survey area shown in Figure 6.1. The total current population (at 2016) in the survey area is 406,923 persons. Based on population projections provided by Experian, this will increase to 474,442 persons by 2035 (the end of the study period). This represents a growth in population of 67,519 persons.

Available Expenditure in the Survey Area

6.7 Experian identify a 'per capita' spend on comparison and convenience goods on a zone by zone basis, and these are shown in Table 2 of Appendix II for comparison goods, and Table 2 of Appendix III for convenience goods.

- comparison goods per head spend ranges from £3,760 in zone 15 (Dartford) to £5,430 in zone 2 (Shoreham). The average spend per head across the survey area is £4,600. These are high levels of spend per head (the UK average spend per head on comparison goods is £3,353) and confirm the survey area is, taken as a whole, an affluent area (all figures 2016 in 2014 prices)
- convenience goods per head spend ranges from £2,157 in zone 15 to £2,654 in zone 2 (Shoreham) compared to a UK average convenience goods spend per head of £1,981 (all figures 2015 in 2014 prices).

6.8 It is expected that spend per head on comparison and convenience goods will increase over the course of the study period, although growth in convenience goods is expected to be relatively limited. Therefore, we apply an annual growth rate to the 2016 baseline figures (as summarised above), which reflects expenditure growth rate projections set out in Experian's Retail Briefing Note 13 (October 2015). These are shown in Table 2 of Appendix II and III.

6.9 The figures set out in Table 2 of Appendix II and III have also been discounted to include allowance for 'special forms of trading' (SFT), such as online shopping. Experian forecast that this currently (2015) accounts for 11.7% of comparison goods spending, and 2.8% of convenience goods spending, and expect this to increase over the course of the study period to 14.3% for comparison goods by 2035, and 6.4% for convenience goods by 2035[4]. Experian forecast that comparison goods SFT will peak at 15.2% of comparison goods spending in 2022, before decreasing over the period to 2035 as the market reaches saturation, that is to say, everyone who can participate in online shopping will, by this point be doing so. Experian forecast that convenience goods SFT will increase incrementally over the period to 2035. Table 2 of Appendix II and Appendix III summarise the 'with' and 'without' expenditure figures, and also shows the deductions we have made for SFT over the duration of the study period based on Experian's guidance.

6.10 By applying the population forecasts to the per capita expenditure forecasts, we can gain an understanding of the total amount of spending on comparison and convenience goods which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period:

- There is currently £1,543.5m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £3,224.6m by the end of the study period (i.e. 2035), equivalent to a growth in comparison goods spending of £1,681.2m; and
- There is currently £902.5m of convenience goods expenditure available to residents of the survey area, which is expected to increase to £1,036.3m by the end of the study period, equivalent to a growth in convenience goods spending of £133.8m.

Shopping patterns in the Survey Area (Step 2)

6.11 The household telephone survey results identify shopping habits of households for both convenience and comparison goods, as well as commercial leisure spending. For convenience goods, the household telephone survey included questions on 'main food' and 'top-up food' shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% 'main' food / 30% 'top-up' food[5]). This forms a 'composite' pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

6.12 For comparison goods, the household telephone survey included questions on where respondents normally undertake shopping for the following types of comparison goods shopping:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

6.13 Shopping patterns for each of these types of comparison goods are then combined to produce a 'composite' set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type base on the proportion of personal spending ('expenditure per capita') available to residents in the survey area.

Comparison goods shopping patterns

6.14 Shopping patterns derived from the household telephone survey allow us to calculate the amount of comparison goods expenditure spent in each centre within and surrounding the study area which forms the basis of our assessment. This indicator is a good reflection of both

[4] Experian Retail Planner 13, October 2015, Figure 5

[5] Based on our experience elsewhere, this represents a suitable split between 'main' and 'top up' food shopping.

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the strength of the retail offer in a centre, as well as its accessibility, and overall quality of experience.

6.15 The total amount of expenditure which is retained within a study area is known as its 'retention rate'; the remaining expenditure which flows to destinations outside the study area is known as 'leakage'. **Table 6.1** shows the amount of comparison goods expenditure retained within the study area (including that retained within Sevenoaks District), and the amount of expenditure 'leakage'.

Table 6.1: Comparison goods expenditure retention in Sevenoaks District

	£m	% of total
Total amount of comparison goods spend available to study area (2016), of which:	1,543.5	100.0%
— Comparison goods trade draw to centres in Sevenoaks (Town centres, District Centres, out-of-centre and non-food floorspace in foodstores)	*253.5*	*16.4%*
— Comparison goods trade draw to other survey area centres (e.g. Orpington/Dartford)	*334.3*	*21.7%*
— Comparison goods trade draw to locations outside survey area (e.g. Bluewater, Royal Tunbridge Wells))	*929.2*	*60.2%*
— Comparison goods spending in local shops in survey area	*26.5*	*1.7%*

Source: Table 5, Appendix II

6.16 Our assessment has identified that there is a total of £1,543.5m of comparison goods expenditure which is available to residents of the study area. Of this, £253.5m is retained by centres and stores in Sevenoaks District, equivalent to a 'retention rate' of 16.4%. In the context of the competition for comparison goods spending which surrounds the District (which we discuss further below), we consider this to be a relatively good performance.

6.17 **Table 6.2** sets out the most popular destinations for comparison goods spending in the survey area, identifying the extent to which facilities outside the District compete for expenditure with the network of centres in Sevenoaks (building on the analysis previously set out at paragraph 4.2). The centres in Sevenoaks are shown in bold.

Table 6.2: Study area comparison goods trade draw by centre

Centre	LPA	Comparison goods trade draw (£m)	% of total comparison goods expenditure available to survey area
Bluewater	Dartford	362.5	23.5%
Royal Tunbridge Wells	Tunbridge Wells	141.1	9.1%
Orpington	Bromley	129.5	8.4%
Sevenoaks town centre	**Sevenoaks**	**122.3**	**7.9%**
Dartford	Dartford	85.4	5.5%
Tonbridge	Tonbridge and Malling	65.9	4.3%
Oxted	Tandridge	37.0	2.4%
Swanley	**Sevenoaks**	**23.1**	**1.1%**
West Malling/Kings Hill	Tonbridge and Malling	16.5	1.1%
Edenbridge	**Sevenoaks**	**15.7**	**1.0%**

Source: Table 5, Appendix II. All comparison goods destinations with turnovers in excess of £10.0m shown.

6.18 Table 6.2 shows that Bluewater is, by some margin, the most popular comparison goods shopping destination for residents in the survey area, drawing £362.5m of comparison goods expenditure, equivalent to 23.5% of total available comparison goods expenditure. Bluewater draws trade from across the survey area but its influence over shopping patterns in the western part of the survey area (Edenbridge, Oxted, and East Grinstead) is more limited.

6.19 Behind this, three centres — Royal Tunbridge Wells, Orpington and Sevenoaks town centre — draw similar amounts of comparison goods spend, of between £122.3m and £141.1m. Sevenoaks town centre's attractiveness as a comparison goods shopping destination has been enhanced in recent years through the opening of the Bligh's Meadow development, and in particular we expect the opening of the Marks & Spencer store to have had a positive impact on the overall comparison goods turnover of the town centre.

6.20 As suggested by the Sevenoaks District retail hierarchy in the Council's adopted Core Strategy, the remaining centres draw a far less significant market share than Sevenoaks town centre. After Sevenoaks town centre, the location in Sevenoaks District which draws the second-highest amount of comparison goods spend is Swanley (£23.1m), followed by Edenbridge

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(£15.7m). The remaining centres in the District attract a comparison goods turnover of under £10m, confirming our 'health check; assessments that they have limited roles as comparison goods shopping destinations especially in some specialist sectors.

Convenience goods shopping patterns

6.21 Convenience goods shopping is a more localised activity and people are generally less willing to travel significant distances to undertake this type of shopping. Our assessment has identified that there is £902.5m of convenience goods expenditure available to residents of the survey area; as set out previously, of this, £278.1m is spent at stores and centres in Sevenoaks District, which are located both in foodstores in Town/Service Centres (e.g. Waitrose stores in Sevenoaks and Edenbridge town centres, and Asda in Swanley) and standalone foodstores in out-of-centre locations (e.g. Sainsbury's at Otford Road, Sevenoaks or Tesco, Riverhead, Sevenoaks).

6.22 From our qualitative assessment, we consider that the District can generally be considered adequately provided for in terms of foodstores, because each of the Town/Service Centres contains at least one foodstore which, in many cases, acts as an important 'anchor' store to the wider offer of the centre. This is particularly the case in respect of the smaller centres such as Swanley and Edenbridge. The District's smaller Centres also in many cases have a convenience goods anchor – for example Co-op stores in Westerham, New Ash Green and Borough Green all play important roles in supporting the wider vitality and viability of these centres.

6.23 Sevenoaks urban area also has the largest number of edge and out-of-centre stores, most of which were constructed in the 1990s. The Sainsbury's, Otford Road Sevenoaks (3,814 sq.m) is the largest foodstore in the District, and is also the most popular destination for convenience shopping, drawing a convenience goods turnover of £64.0m from the survey area **(Table 6.3).**

Table 6.3: Turnover of main foodstores in Sevenoaks District

Foodstore	Total net floorspace (sq.m)	Turnover from survey area (£m)	Sequential location (in/ edge/ out-of-centre)
Sainsbury's, Otford Road, Sevenoaks	3,814	64.0	Out-of-centre
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	3,198	46.8	Out-of-centre
Asda, London Road, Swanley	5,460	49.9	In-centre
Waitrose, Mont St Aignan Way, Edenbridge	1,152	21.0	Out-of-centre
Waitrose, High Street, Sevenoaks	2,208	21.0	In-centre
Lidl, London Road, Sevenoaks	1,286	21.9	In-centre

Source: Table 7, Appendix III.

Other inputs into the quantitative need assessment

Sales Efficiency

6.24 It is also necessary to factor in changes in respect of 'sales efficiencies'. These represent the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service chargers) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail capacity studies. Although Experian (who are the data providers for the other technical inputs into this study) do not provide clear guidance on sales densities, it is fair to assume that as Experian anticipate that personal spending on both comparison and convenience goods will increase over the study period, so will sales efficiency. Informed by Experian's expenditure growth forecasts[6], we have therefore adopted the following sales efficiency growth rates:

- **Comparison goods:** 1.75%, per annum (50% of average per capita expenditure growth on comparison goods between 2016 and 2035 of 3.5%);
- **Convenience goods:** 0.04%, per annum (50% of per capita expenditure growth on convenience goods between 2016 and 2035 rate of 0.08% per annum)

Floorspace Data

6.25 The comparison and convenience goods floorspace data which we incorporate into our model has been drawn from a range of data sources, including the Institute of Grocery Distribution (IGD), Experian Goad, the Trevor Wood Retail Warehouse Database, and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

[6] Experian Retail Planner 13, October 2015, Figure 1a

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Summary

- In this section we have set out the methodology behind the calculation of quantitative 'need' for new comparison (non-food) and convenience (food) goods, which we undertake in the following section. The need assessment is informed by an assessment of shopping patterns over the study area shown in Figure 6.1, which covers Sevenoaks District in its entirety, as well as parts of neighbouring authorities where Sevenoaks's catchment extends into.
- The total current population (at 2016) in the survey area is 406,923 persons. Based on population projections provided by data provider Experian, this will increase to 474,442 persons by 2035 (the end of the study period). This represents a growth in population of 67,519 persons.
- There is currently £1,543.5m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £3,224.6m by the end of the study period (i.e. 2035), equivalent to a growth in comparison goods spending of £1,681.2m.
- Of the £1,543.5m comparison goods expenditure currently available to the study area, £253.5m (16.4%) is retained by centres and stores in Sevenoaks District. In light of the strength of the retail offer in surrounding centres (as discussed in the previous section), we consider this to represent a reasonably good performance. Of the £253,5m retained in the District, £200.3m is spent within Sevenoaks (including £122.3m in Sevenoaks town centre), £23.1m in Swanley, £15.7m in Edenbridge. Otford, New Ash Green and Westerham each achieve a comparison goods turnover of under £10m.
- There is currently £902.5m of convenience goods expenditure available to residents of the study area, which is expected to increase to £1036.3m by the end of the study period, equivalent to a growth in convenience goods spending of £133.8m.
- Of the £902.5m convenience goods expenditure currently available to the study area, £278.1m is retained by centres and stores in Sevenoaks District. It is apparent that the District is generally well-provided for in terms of foodstores, with each Town/Service centre containing at least one foodstore, which in many cases acts as the 'anchor' to the retail offer. There are also large out-of-centre foodstores in Sevenoaks, with a Tesco Superstore and Sainsbury's store located at Aisher Way and Otford Road Retail Park respectively. The most popular foodstore (in terms of turnover) is the Sainsbury's store at the Otford Road Retail Park, which has a convenience goods turnover of £64.0m.
- 'Special forms of trading' – which is mostly accounted for by online shopping – is expected to account for a maximum of 15.2% of total comparison goods spending and 6.4% of convenience goods spending over the course of the study period to 2035. The expenditure growth figures set out above take the most recent SFT forecasts (also provided by Experian) into account.

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7. COMPARISON GOODS CAPACITY FORECASTS

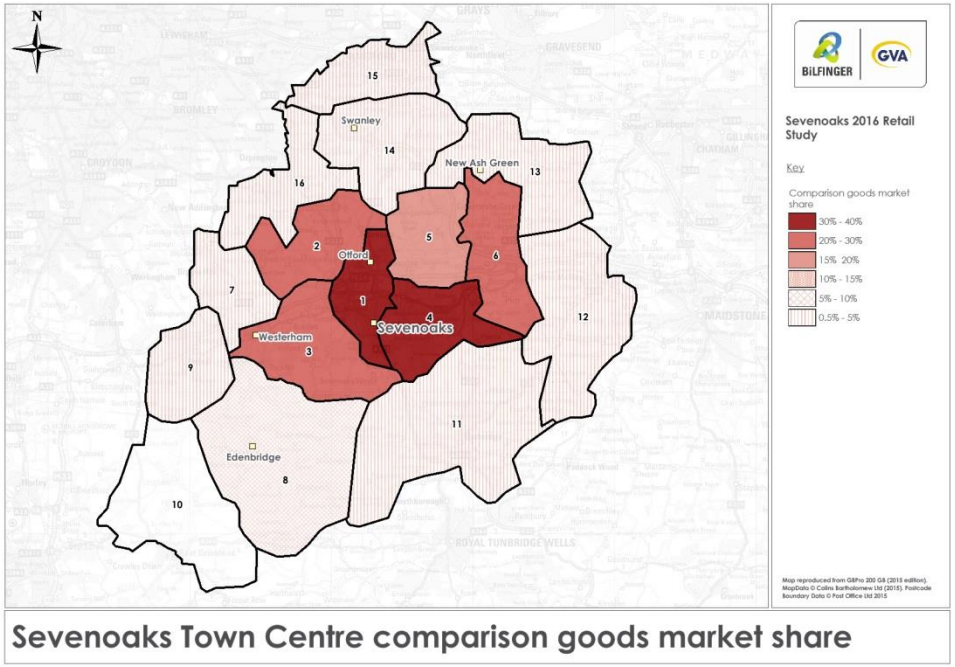
7.1 Having introduced the key inputs into our quantitative 'need' assessment in the previous section, here we progress to identify the quantitative comparison (non-food) capacity forecasts for Sevenoaks District – that is, the 'need' for new floorspace which we recommend the Council should plan for in its emerging Local Plan, based on the methodology which we have set out in Section 6. The convenience goods capacity forecasts follow in Section 8. The discussion in this section should be read in conjunction with the data tables in Appendix II of Volume 2 to the study.

Sevenoaks (principal town centre)

7.2 As identified in the previous section, Sevenoaks town centre has, the highest comparison goods turnover of any of the centres in the District, drawing £122.3m of spend from the survey area, equivalent to 7.9% of the total comparison goods expenditure available to the survey area. Analysis of Table 4 (Appendix II) shows that Sevenoaks draws a comparison goods market share from fifteen of the sixteen survey zones (**Figure 7.1**).

7.3 Sevenoaks town centre draws a market share of 38.9% from its 'local' zone, zone 1, and we consider this to represent a reasonable performance, albeit one which the Council should aspire to improve over the course of its new Local Plan period. It also draws a market share of 34.2% from zone 4, and together these zones can be considered to form Sevenoaks town centre's 'primary catchment area'. Beyond this, as can be seen from Figure 7.1, there is a clear (almost) concentric ring of zones from which Sevenoaks town centre captures a more limited but nevertheless still significant market share — zones 2, 3, 5 and 6 — and these zones can be considered to form Sevenoaks town centre's secondary catchment area. Beyond this, the market shares drawn to Sevenoaks town centre become more limited, as the influence of competing centres over comparison goods shopping patterns become more pronounced.

Figure 7.1: Sevenoaks comparison goods market share by zone



Source: Table 4, Appendix II

7.4 Because the overall survey area and sub-division into survey zones is unchanged from that of the previous household telephone survey (which was undertaken in 2005), it is possible to undertaken an analysis of how the market share of Sevenoaks town centre has changed over the past decade, during which time there has been enhancement of the retail offer in Sevenoaks town centre, including the opening of Bligh's Meadow a new Marks and Spencer store and an enlarged Waitrose store.

7.5 In **Table 7.1** we set out an analysis of the comparison goods market share of Sevenoaks town centre by zone, and how this has changed since the 2005 survey. Positively, Table 7.1 shows that Sevenoaks town centre has increased its market share from 14 of the 16 survey zones. Most notably, the town centre has increased its market share by 5.9% from its 'local' zone, zone 1, indicating that the town centre is doing a stronger job of retaining market share from immediate catchment area. A similar increase can be observed from zone 2, and a 7.2% increase from zone 4 can also be seen — as we have set out above zones 1 and 4 effectively

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forms the primary catchment area for Sevenoaks town centre. The most notable change in shopping patterns has come from zone 6, where Sevenoaks town centre has managed to increase its market share by 13.4%. The change in market share from each of the zones which comprise the primary and secondary catchment area is also shown visually in **Figure 7.2.**

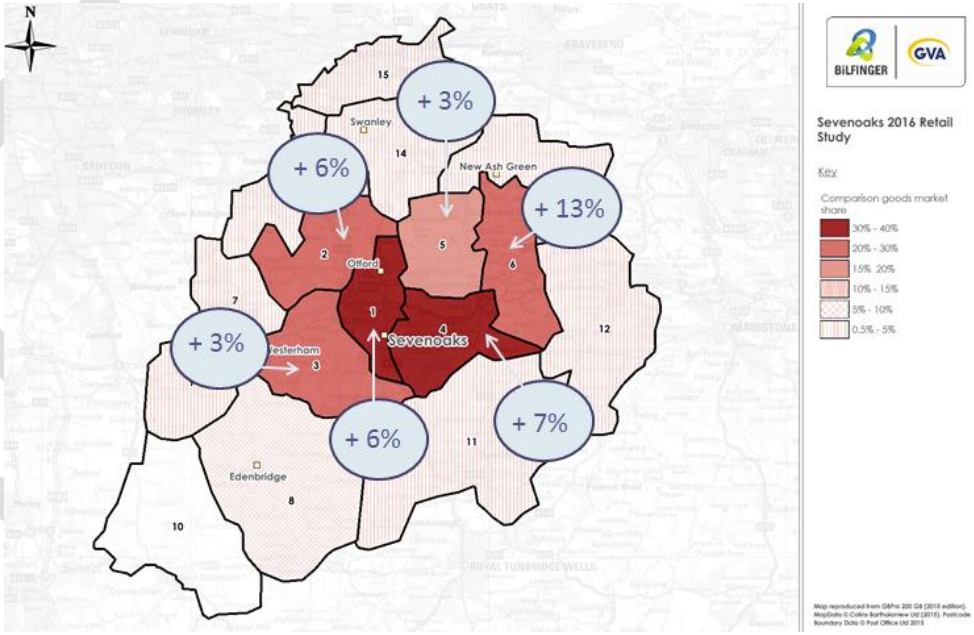
7.6 It can be seen from Table 7.1 that Zone 7 is the only location where the market share has decreased, with a decrease of 3.2%. Sevenoaks continues to have little influence over Zone 10, possibly due to the proximity of the zone to East Grinstead.

Table 7.1: Sevenoaks town centre change in comparison goods market share, 2005-2016

Survey Zone	Comparison goods market share (%) 2005	Comparison goods market share (%) 2016	Change in comparison goods market share (%) 2009 to 2017
Zone 1	33.0%	38.9%	+5.9%
Zone 2	16.0%	21.9%	+5.9%
Zone 3	22.0%	25.2%	+3.2%
Zone 4	27.0%	34.2%	+7.2%
Zone 5	15.0%	18.2%	+3.2%
Zone 6	7.0%	20.4%	+13.4%
Zone 7	7.0%	3.8%	-3.2%
Zone 8	1.0%	7.4%	+6.4%
Zone 9	0.0%	2.2%	+2.2%
Zone 10	0.0%	0.0%	0%
Zone 11	1.0%	4.5%	+3.5%
Zone 12	0.0%	2.1%	+2.1%
Zone 13	0.0%	1.0%	+1%
Zone 14	0.0%	2.2%	+2.2%
Zone 15	0.0%	1.2%	+1.2%
Zone 16	2.0%	2.4%	+0.4%

Source: Sevenoaks Retail Study 2009 / Table 4, Appendix II.

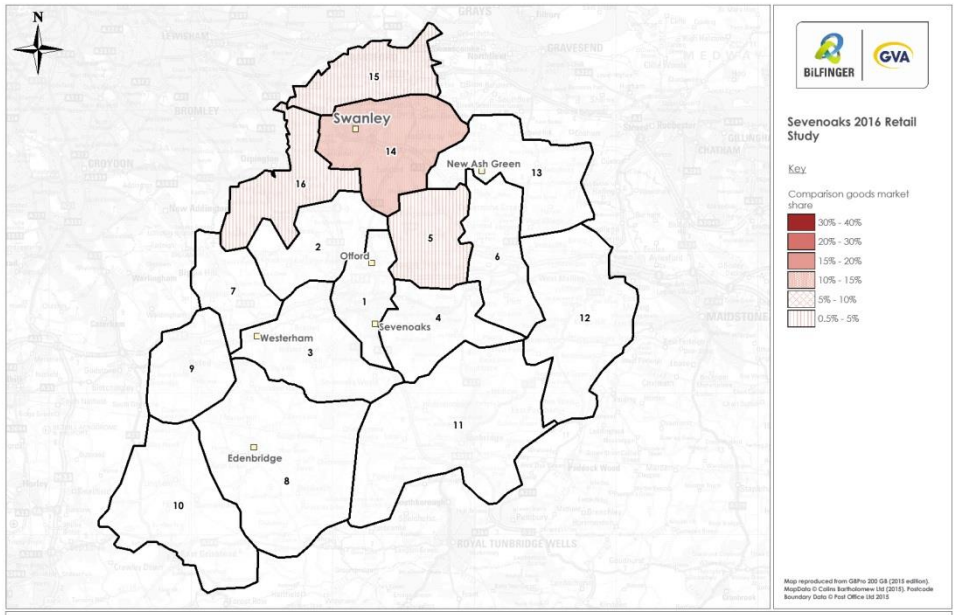
Figure 7.2: Change in market share of Sevenoaks town centre for primary and secondary catchment area, 2005-2016



Swanley (secondary town centre)

7.7 Swanley Secondary town centre draws £23.1m of comparison goods spend from the survey area, 2.1% of total available comparison goods spend. Its catchment area is much more localised than Sevenoaks (**Figure 7.3**), reflecting its more limited retail offer, and virtually all of its market share is draw from its 'local' zone, zone 14, and the town centre attracts a comparison goods turnover of £13.2m from this zone. Residents in zone 14 also undertake their comparison goods shopping in Bluewater (which draws £52.3m of spending from zone 14), and Dartford (which draws £18,4m of spending from zone 14), and therefore these represent the key competing locations for this part of the district.

Figure 7.3: Swanley comparison goods market share by zone



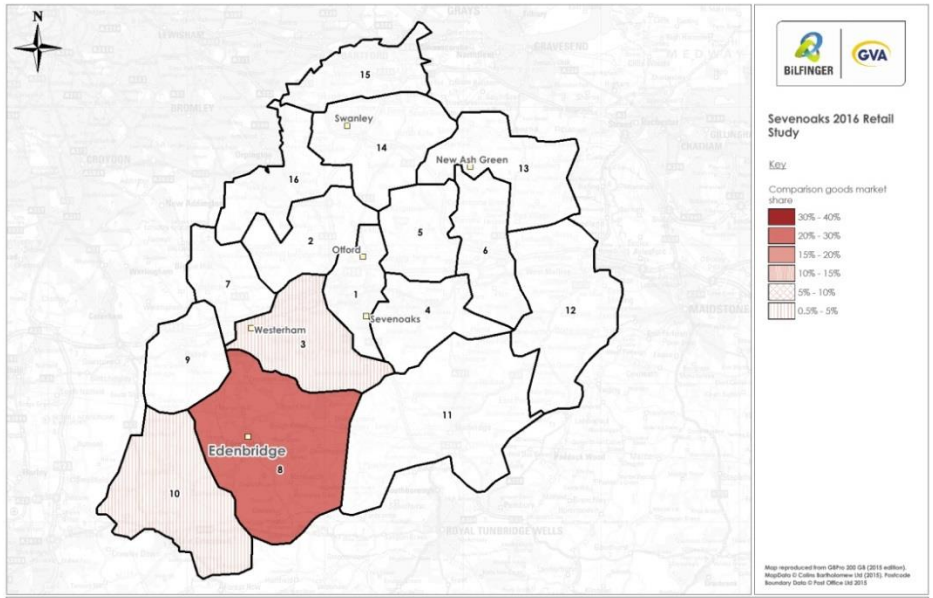
Swanley comparison goods market share

Source: Table 4, Appendix II

Edenbridge (rural service centre)

7.8 Edenbridge, identified within the Sevenoaks Core Strategy (adopted 2011) as being a rural service centre draws £15.7m of comparison goods spend from the survey area. Again, its catchment area is localised rather than being a destination to which people travel a significant distance to: £14.0m of spend comes from its 'local' zone, zone 8, with £1.2m of spend also drawn from zone 10. Edenbridge principally competes with Royal Tunbridge Wells for comparison goods spending, which draws £20.3m of spend from residents in zone 8.

Figure 7.4: Edenbridge comparison goods market share by zone



Edenbridge comparison goods market share

Source: Table 4, Appendix II

Other centres

7.9 As we have previously identified, the remaining Service Centres have a more limited role and function in respect of comparison goods shopping, and accordingly do not attract significant comparison goods turnovers from residents of the survey area; we summarise the performance of these below:

- **Otford** draws a total of £8.3m of comparison goods spend from the survey area in full, of which £2.8m comes from its local zone (zone 1). Most residents in zone 1 undertake their comparison goods shopping in Sevenoaks, which draws £87m of spend from zone 1, and a further £22.8m is spent in Bluewater Shopping Centre;
- **Westerham** has a comparison goods turnover of £4.9m, reflecting the fact that the offer in this centre is more pitched towards convenience and retail services, in particular the restaurant/café sector. Of its £4.9m comparison goods turnover, £2.8m comes from zone 3 (its local zone) and a further £1.4m comes from zone 8. As noted above, most residents in zone 8 undertake their comparison goods shopping in Royal Tunbridge Wells, which claims £20.3m of the comparison goods spending from the zone or Edenbridge which claims £14m in zone 8.
- **New Ash Green** has the lowest comparison goods turnover of all the Centres, at £1.2m; it has a very limited range of comparison goods facilities which are mostly orientated towards day-to-day shopping needs. The majority of residents in zone 13, its local zone, look to Bluewater for comparison goods shopping.

Out-of-centre floorspace

7.10 The only significant concentration of out-of-centre floorspace in the District is in Sevenoaks itself, with a concentration of retail warehousing in the Otford Road area, to the north of the town centre. The retail parks in this location draw a total of £45.7m of comparison goods spending from the survey area, and the nearby Sainsbury's draws a further £16.7m of comparison goods spend. These are not insignificant levels of turnover — and whilst most of the retail warehousing offer in Sevenoaks is 'bulky goods' in nature, and therefore less likely to directly compete with the town centre — provision of open A1 retail could potentially pose more of a threat to the vitality and viability of the town centre.

Comparison goods trading performance

7.11 By comparing the comparison goods turnovers of the key centres in the District with the amount of comparison goods floorspace they contain, we can obtain an indication of their current trading performance, i.e. turnover per square metre. This exercise is useful in showing whether a centre is trading in line with expectations (taking account its role and function in the retail hierarchy), or whether it is 'under-trading' or 'over-trading'.

7.12 Table 8 of Appendix II shows that, on aggregate, comparison goods floorspace in Sevenoaks District is trading at £8,257 per sq.m. This is an aggregate trading performance, based on the turnover of the town and service centres and also the out-of-centre floorspace, such as Otford Road, and comparison goods sales within large foodstores. **Table 7.2** sets out the trading performance of Sevenoaks town centre, plus Swanley and Edenbridge. We have not undertaken an equivalent assessment for the other centres in the District, as (1) there is no Experian Goad floorspace data available for these centres, and (2) their comparison goods turnover is, as set out above, relatively low and therefore the results would not, in any event, be a meaningful exercise.

Table 7.2: Comparison goods trading performance of Sevenoaks, Swanley & Edenbridge

	Comparison goods turnover from survey area (£m)[1]	Estimated comparison goods floorspace (sq.m)[2]	Turnover per sq.m (£)
Town centres			
Sevenoaks	122.3	10,682	11,450
Secondary Town centre			
Swanley	23.1	5,600	4,117
Rural Service Centre			
Edenbridge	15.7	2,583	6,085

[1]*Source: Table 5a, Appendix II*
[2]*Source: Experian Goad category reports / EBC data*

7.13 Table 7.1 shows that there are differences in the trading performance between Sevenoaks's centres. Sevenoaks town centre is performing particularly well, achieving a comparison goods sales density of £11,450 per sq.m — this is partly likely to be reflective of the type of comparison goods offer available in the centre, which is quite upmarket. In the context of the considerable competition offered by nearby locations such as Bluewater (which attracts a 16.9% market share from zone 1, Sevenoaks town centre's local zone) we consider this to be a strong trading performance.

7.14 By contrast, Swanley's comparison goods sales density of £4,117 per sq.m is low, and confirms the centre is currently underperforming as a comparison goods sales destination. The

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comparison goods offer in the centre is currently quite limited, and restricted to 'value' retailers. An improvement in both the quality and range of the comparison goods offer in the centre should, in time, lead to an improved sales density.

7.15 The comparison goods sales density for Edenbridge is considered to be strong when considered against its role and function in the local retail hierarchy.

7.16 It should be noted that the figures shown in Table 7.2 do not take account of expenditure 'inflow' from beyond the study area, and if these figures were to be included, the performance of some of the centres would be higher.

Identification of comparison goods capacity

7.17 Having undertaken the above assessment of trading performance, we are in a position to establish the quantum of new comparison goods floorspace which the Council should seek to plan for over the period to 2035. In assessing capacity for future comparison goods floorspace, we have assumed that existing comparison goods floorspace stock across the District will improve its sales efficiency (i.e. its turnover per sq.m) over the course of the study period. We have assumed that new comparison goods floorspace would achieve a sales density in the region of £6,500 per sq.m, which is considered to be a reasonable proxy for the trading performance of modern comparison goods floorspace in a robustly-trading location. Based on the performance assessment set out above, new comparison goods floorspace in Sevenoaks town centre could potentially trade at a higher level, dependent on the end operators in any new floorspace which comes forward.

7.18 In identifying capacity it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. We also advise that findings should be considered alongside the qualitative discussion of the performance of individual centres which this report has previously set out, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace. This is particularly applicable to centres such as Swanley, where the Council's regeneration aspirations are likely to mean there is a qualitative need for additional provision compared to what would be required under a 'baseline' scenario.

7.19 The 'baseline' comparison goods capacity for Sevenoaks District over the period to 2035 is shown in **Table 7.3**. These capacity forecasts are based on 'constant market shares', i.e. assuming that current patterns of comparison goods shopping (as identified in the household telephone survey) will remain unchanged. The capacity forecasts do not include any planning commitments, as none are known to be coming forwards at the time of writing.

Table 7.3: Comparison goods floorspace capacity, Sevenoaks District

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
District-wide comparison goods floorspace capacity	3,900	9,100	*15,300*	*21,700*

Source: Table 8a, Appendix II
**Indicative only. Figures are cumulative.*

7.20 Table 7.3 shows that, assuming current patterns of comparison goods shopping remain unchanged (i.e. a 'constant market share' approach), there is a need for the Council to plan for an additional 3,900 sq.m net additional comparison goods floorspace in the short-term period to 2020. This requirement then increases to 9,100 sq.m net additional comparison goods floorspace by 2025, 15,300 sq.m net by 2030 and 21,700 sq.m net by 2035. As stated above, figures at the end of the Plan period should be considered indicative.

7.21 **Table 7.4** also shows the capacity for each of the principal centres in the District, again based on a 'constant market shares' approach. The household survey results and our own analysis has shown that Sevenoaks town centre is performing well as a comparison goods shopping destination at present, and has increased its market share from much of its primary and secondary catchment area relative to the previous household survey (undertaken in 2005). The strong performance of Sevenoaks town centre, coupled with the trading of the out-of-centre retail warehouse facilities in the town does, in turn, generate a 'need' for new floorspace, and accordingly the majority of the District-wide requirement of 9,100 sq.m net by 2025 / 21,700 sq.m net by 2035 arises in the Sevenoaks urban area. Table 7.3 shows that, as part of the District-wide requirement, there is a quantitative 'need' for 7,200 sq.m net by 2025 / 17,100 sq.m net by 2035 to be accommodated in the Sevenoaks urban area. In line with national and local policy requirements, this 'need' should be directed towards Sevenoaks town centre.

7.22 Because the remaining centres in the District currently have a more limited role and function as comparison goods shopping destinations, the quantitative 'need' for new floorspace generated in these locations is more limited. Based on current shopping patterns there is a quantitative 'need' for just 800 sq.m net additional comparison goods floorspace in Swanley by 2025, increasing to 2,000 sq.m net by 2035. However, there is a strong qualitative case for Swanley town centre to accommodate a greater amount of comparison goods floorspace than this, in order to assist in the Council's aspirations for the regeneration of the centre. We return to discuss this further in Section 9.

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7.23 The quantitative 'need' for comparison goods floorspace in Edenbridge is 600 sq.m net by 2025 /1,400 sq.m net by 2035. There is a combined 'need' for additional 500 sq.m net additional comparison goods floorspace by 2025 across the three Local Service Centres of Otford, Westerham and New Ash Green, increasing to 1,200 sq.m net by 2035.

Table 7.4: Comparison goods floorspace capacity by centre, Sevenoaks District

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
Sevenoaks town	*5,200*	*5,700*	*6,200*	*6,500*
Swanley	*400*	*800*	*1,400*	*2,000*
Edenbridge	*300*	*600*	*1,000*	*1,400*
Otford/Westerham/New Ash Green	*200*	*500*	*900*	*1,200*

Source: Table 8b-8e, Appendix II
**Indicative only. Figures are cumulative.*

7.24 In all cases we repeat our advice that capacity forecasts, particularly those beyond 2025, should be subject to regular review throughout the Council's new Local Plan period.

Summary

- **In this section we have discussed the comparison goods shopping patterns highlighted in the previous section in further detail, defining the catchment area for each of the Town and Service centres in the District. We also identify the amount of comparison goods floorspace which the Council should plan for over the course of the period to 2035.**
- **The results of the household survey show that Sevenoaks town centre has a clearly defined 'primary' and 'secondary' catchment area, and that its attractiveness as a comparison goods shopping destination from across the survey area has, for the most part, increased when compared to the previous survey of shopping patterns which was undertaken in 2005. The catchment of Swanley and the smaller centres in the District is, as would be expected, considerably more limited.**
- **We have also analysed the comparison goods trading performance of each of the Town and Service Centres in the District. This has identified that comparison goods floorspace in Sevenoaks town centre is trading particularly strongly, but provision in Swanley is currently underperforming.**
- **Based on a constant market share approach (i.e. assuming that current patterns of comparison goods shopping remain unchanged), the Council should plan for up to 9,100 sq.m net additional comparison goods floorspace by 2025, increasing to up to 21,700 sq.m net additional comparison goods floorspace by 2035.**
- **The majority of this qualitative floorspace 'need' arises in the Sevenoaks urban area on account of the strong trading performance of comparison goods floorspace in the town, but there may be a qualitative case for an element of this need to be developed in Swanley town centre in order to assist with the regeneration of the centre.**
- **Longer term forecasts should be considered indicative and subject to regular review.**

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8. CONVENIENCE GOODS CAPACITY FORECASTS

8.1 In this section we set out the capacity for additional convenience (food) floorspace in Sevenoaks District over the period to 2035. Our discussion follows the same format as set out for the comparison goods capacity forecasts in the previous section. The discussion set out below should be read in conjunction with the tabulations at Appendix III.

Shopping patterns by centre

8.2 **Table 8.1** shows the most popular convenience goods shopping destinations for those parts of the survey area that fall within Sevenoaks District — zones 1 (Sevenoaks), 2 (Otford), 3 (Westerham), 8 (Edenbridge), 13 (New Ash Green) and 14 (Swanley). It also shows each zone's 'local retention rate', i.e. the proportion of available convenience goods expenditure to residents of that zone which is retained within the zone itself, thus giving an indication of the sustainability of localised convenience goods shopping patterns. The green-shaded entries denote stores within the respective 'local' zones; the purple-shaded zones denote stores within an adjacent survey zone.

Table 8.1: Local retention rate and most popular convenience goods shopping locations by zone

	Local retention rate (for zone) (%)	Most popular convenience goods shopping location (%)	Second-most popular convenience shopping location (%)	Third-most popular convenience shopping location (%)
Sevenoaks (zone 1)	88.2%	Sainsbury's Otford Road, Sevenoaks (29.2%)	Tesco Superstore, Aisher Way, Sevenoaks (25.4%)	Waitrose, High Street, Sevenoaks (13.2%)
Swanley (zone 14)	56.4%	Asda, London Road, Swanley (44.7%)	Aldi, St Mary's Road, Swanley (10.8%)	Dartford foodstores (8.0%)
Edenbridge (Zone 8)	60.1%	Waitrose, Mont Aignon Way, Edenbridge (52.5%)	Oxted foodstores (11.6%)	Tesco Express, 39-41 High Street, Edenbridge (7.6%)
Westerham (Zone 3)	15.1%	Tesco Superstore, Aisher Way, Sevenoaks (25.3%)	Oxted foodstores (13.3%)	Co-Op, The Grange, High Street, Westerham (9.3%)
Otford (Zone 2)	0%	Tesco Superstore, Aisher Way, Sevenoaks (34.8%)	Sainsburys, Otford Road, Sevenoaks (18.7%)	Orpington foodstores (12.6%)
New Ash Green (Zone 13)	9%	Gravesend foodstores (48.6%)	Longfield foodstores (20.7%)	Co-Op, The Row, New Ash Green (8.6%)

Source: Table 4, Appendix III

8.3 Table 8.1 shows that there is variation in the 'local retention rate' across the District — this is to be expected; the larger centres (e.g. Sevenoaks) have a greater number of foodstores of different sizes and operators, and accordingly fewer residents needs to travel further afield to undertake their convenience goods shopping. By contrast, smaller centres such as New Ash Green have much more limited provision, and the stores are much smaller and generally catered towards meeting top-up shopping needs. It therefore makes sense that residents of these settlements look towards their nearest larger town (such as Oxted, in the case of Westerham, or Gravesend, in the case of New Ash Green) rather than to shop within the District, in Sevenoaks for example. However, with the exception of New Ash Green (zone 13), Table 8.1 shows that many residents' convenience goods shopping needs are currently being met at the local level.

Performance assessment

8.4 In Tables 6 and 8 of Appendix III, we have undertaken a review of the trading performance of the convenience goods floorspace in the District, to establish whether the floorspace is trading

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in line with 'benchmark' levels (i.e. company averages for national operators, or typical sales densities for independent retailers). Table 8 of Appendix III shows that, on average, convenience goods floorspace in Sevenoaks urban area is trading (i.e town centre and out-of-centre convenience goods floorspace combined) at £16,477 per sq.m, which is a high sales density and suggests that most convenience goods floorspace in the District is trading particularly well.

8.5 Analysis of the performance of individual stores in the District is set out at Table 6 of Appendix III. This shows that the performance of foodstores in the District is quite mixed. The foodstores within Sevenoaks town centre appear to be performing relatively poorly when compared with out of centre stores in the Sevenoaks area. The Waitrose, High Street, store is showing as 'under-trading' by -£3.7m against company average levels, and the Tesco Metro store on High Street by -£8.9m. This is partly likely to be reflective of the fact that both stores may cater more towards the top up shopping market and therefore have a lower response rate in the household survey if they act as 'pop in' shops where people just pick up one or two items. The stores could, accordingly, be being under-reported slightly. However, it is also possible that the stores have been impacted by the opening of the foodhall within the new Marks & Spencer store at Bligh's Meadow, particularly as this store benefits from directly adjacent surface car parking.

8.6 Qualitatively, our site visits to the Waitrose store have suggested that this store appears busy and is trading well. The Tesco Metro appeared less busy, and is possibly too big a store for the 'Metro' format the company is trading from — the fact that a significant proportion of the floorspace is given over to the company's clothing brand is an indication of this; typically these are only located in the company's large out-of-town stores.

8.7 The out of centre stores within the Sevenoaks urban area appear to be performing well. Sainsbury's, Otford Road is, as we have set out in Section 6, the most popular foodstore for residents in the survey area, and our assessment shows that this store is currently 'over-trading' by +£30.8m when compared to company average levels. The large Tesco store at Riverhead is also performing well, at +£19.0m above company average levels, and the Lidl store at London Road is also performing particularly well and is currently over-trading by +£18.4m.

8.8 Elsewhere in Sevenoaks District, foodstores are generally performing well, albeit not performing as significantly above the company averages as the out-of-centre stores in Sevenoaks:

- The Asda store in Swanley is performing +£1.6m above the company average, and the Aldi in Swanley is trading strongly, at +£5.4m above company average levels;
- The Waitrose store in Edenbridge is performing well, following its conversion from a Co-op store, and the store is currently trading at +£6.7m above company average levels;
- In Westerham, the Co-Op is performing at around the company's average level (+£0.7m against company benchmark levels);
- In New Ash Green, despite the overall relatively poor performance of the centre, the Co-Op appears to be performing well, and is currently trading at +£3.2m above the company average.

Identification of convenience goods capacity

8.9 **Table 8.2** shows the capacity for additional convenience goods floorspace in Sevenoaks district over the period to 2035. As with the comparison goods capacity forecasts which we have set in Section 7, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. Findings should be considered alongside our qualitative assessments set out earlier in this report, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace.

8.10 Based on a 'constant market share' approach (i.e. assuming that current patterns of shopping remain unchanged), **Table 8.2** shows that there is a quantitative 'need' for 9,000 sq.m net additional convenience goods floorspace in the District over the period to 2025, increasing to 10,300 sq.m net by 2035. The forecasts do not take into account any 'commitments', as none are known at the time of writing.

Table 8.2: Convenience goods floorspace capacity, Sevenoaks District

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
District-wide convenience goods floorspace capacity	8,300	9,000	*9,800*	*10,300*

Source: Table 8e, Appendix III
**Indicative only. Figures are cumulative and rounded.*

8.11 In Table 8a-8d of Appendix III we have sub-divided the requirements between each of the principle locations in the District, in order to provide guidance as to where new foodstore development should potentially come forward. Because it is the focus of the population growth in the District, and coupled with the fact that the majority of its existing convenience goods floorspace is trading particularly strongly, the majority of the identified 'need' arises in

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the Sevenoaks urban area, with lower levels of need arising in Swanley, Edenbridge and the rest of the District. A summary of this is provided in **Table 8.3.**

8.12 However, as set out in the previous section, it does not automatically follow that existing patterns of shopping should reflect future distribution of floorspace, and therefore the forecasts set out below should be considered in conjunction with the qualitative recommendations set out elsewhere in this report. In particular, there may be scope for additional foodstore provision in Swanley over and above the 1,600 sq.m net figure set out in Table 8.3, in order to support the regeneration of the centre. Similarly, whilst there is a quantitative 'need' for additional provision in Edenbridge (largely arising on account of the strong trading performance of the Waitrose store), there may not be scope for this to be accommodated on an in-centre or suitable edge-of-centre site due to the relatively constrained nature of the centre.

Table 8.3: Convenience goods floorspace capacity by centre, Sevenoaks District

Convenience goods floorspace capacity	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
Sevenoaks urban area	5,300	5,700	*6,200*	*6,500*
Swanley	1,100	1,300	*1,400*	*1,600*
Edenbridge	800	900	*1,000*	*1,000*
Local Service Centres	1,100	1,200	*1,200*	*1,300*

Source: Table 8a-Table 8d, Appendix III
**Indicative only. Figures are cumulative and rounded.*

Summary

- **In this section we have reviewed the convenience goods shopping patterns of residents in the study area in greater detail, showing the most popular convenience goods facilities in each of the study zones which fall within Sevenoaks District, reviewing the trading performance of convenience goods floorspace, and identifying the amount of convenience goods floorspace which the Council should plan for over the period to 2035.**
- **There are no qualitative gaps in convenience goods provision in the Town and Service Centres. Each of the District's Town and Service centres has at least one foodstore which, in many cases, anchors the wider retail and leisure offer.**
- **In some cases, a foodstore exerts a particularly strong influence over local market shares. This is particularly the case in the Sevenoaks town area, where the household telephone survey has identified that the Sainsbury's and Tesco Superstore each attract a market share of over 25% from their respective 'local' survey zones.**
- **The majority of the out of centre foodstores in the District are trading strongly, and a number have turnovers significantly in excess of operator 'benchmark' levels. Town centre foodstores within Sevenoaks town centre appear to be trading at below average levels, but this is partly likely to be related to the fact they perform a greater role and function as 'top up' shopping locations.**
- **Assuming a 'constant market share' approach (i.e. that current patterns of convenience goods shopping will remain unchanged), the Council needs to plan for up to 9,000 sq.m net convenience goods floorspace by 2025 rising to (indicatively) 10,300 sq.m net convenience goods floorspace by 2035. The majority of this 'need' arises in the Sevenoaks area, on account of the strong trading performance of many of the foodstores in this area at present.**
- **As with the comparison goods forecasts identified in the previous section, these figures should be kept under review.**

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9. CONCLUSIONS & STRATEGIC RECOMMENDATIONS

9.1 In this report we have provided an update assessment of the retail needs of Sevenoaks District, over the course of the period of the Council's new Local Plan, to 2035. The study will form an important part of the evidence base for the Council's new Local Plan, and will also be used by the Council to assist in the determination of planning applications for new town centre development in the District. The findings of this study update the District's previous retail capacity evidence base study, from 2009.

9.2 The findings set out in this study have been underpinned by a new household telephone survey of shopping patterns, superseding the previous equivalent survey which dates back to 2005. In order to ensure continuity with the previous studies, the boundaries of the 'survey area', and the subdivision of this survey area into zones (which allows for a more localised analysis of shopping patterns to be undertaken), are all unchanged. The 'survey area' we have used for the purposes of our assessment covers all of Sevenoaks District, and extends into parts of neighbouring authority areas which may look towards centres in the District for their shopping and services.

9.3 This study has been prepared at a time of considerable change for the retail and leisure sector in the UK — whilst there has been a shift back in focus towards town centres in recent years, there is increasing a need for centres to act as 'destinations' rather than being focus for retail activity. Therefore, whilst the principle focus of this study has been to update the estimates of new retail floorspace which the Council needs to plan for, the delivery of this should form part of a wider strategy to enhance and diversify the range of 'town centre' uses within the District's network of centres, in order to support their long term vitality and viability over the course of the Council's new Local Plan period.

National and Local Planning Policy Framework

9.4 The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. It also requires local planning authorities to define the extent of the town centres and primary shopping areas, based on a clear definition of primary and secondary frontages.

9.5 The Sevenoaks District Core Strategy was adopted in February 2011, a year before the adoption of the National Planning Policy Framework in March 2012. Paragraph 4.1.6 of the Core Strategy sets out the hierarchy of centres, identifying Sevenoaks as the 'principal town' and Swanley as the 'secondary town centre'. Below this, Edenbridge is classified as a 'Rural Service Centre' and the centres of Otford, Westerham and New Ash Green as Local Service Centres. It is these six centres which have formed the basis of our study.

9.6 Policy LO3 of the Core Strategy states that new development should be of an appropriate scales and consistent with the existing character of the centre and improving town centre quality. Policy LO3 goes on to state that the town centre can accommodate approximately 4,000 sq.m of new shopping floorspace (based on a split of 1,700 sq.m convenience floorspace and 2,300 sq.m comparison) — we update these capacity forecasts as part of this study. Policy LO4 supports the regeneration and redevelopment of Swanley town centre, and we expect that this will continue to remain an important policy focus in the Council's new Local Plan (discussed below).

9.7 The Council is currently in the process of developing a new Local Plan (2015-2035). It is anticipated that the 'Issues and Options' draft will undergo consultation in Spring/Summer 2017. The development of this new Local Plan requires a new supporting evidence base, which this study forms part of.

National retail and leisure market trends

9.8 Our study has set out that the 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'Click & Collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences. A number of retailers in Sevenoaks town centre, for example, now offer 'Click & Collect' facilities, including Boots, Waitrose (which can also be used as a Click & Collect for John Lewis orders), Marks & Spencer and Tesco — however it has yet to extend to many retailers in either centre (particularly the independent sector), and indeed this represents an opportunity for all of the District's centres moving forward.

9.9 The convenience goods sector is in the middle of a considerable period of change. The main foodstores (i.e. the 'big four' - Sainsbury's, Tesco, Asda, Morrisons) have reigned in substantial expansion and the roll-out of super-sized stores, evidenced by the recent withdrawal of Sainsbury's from developing a new foodstore (which benefitted from planning consent) in

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Edenbridge for example. The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. These trends have encouraged repetitive top-up shopping that in turn diminishes main grocery sales and renders large-format stores less profitable. However, it is important to note that these large-format stores continue to account for the majority of convenience goods shopping trips, and the evidence from this study suggests that the majority of larger-format stores in the District are continuing to perform well.

9.10 Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Many out-of-centre developments are seeking to increase footfall through a greater product offer and mix of uses (including introduction of coffee shops and casual dining) to encourage footfall and longer dwell times.

9.11 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.

9.12 Sevenoaks town centre benefits from a particularly strong café and restaurant sector, and therefore is well placed to respond to these changes in consumer behaviour, although there are qualitative gaps in its leisure offer, in particular the absence of a multi-screen cinema. Whilst the growth of the café and restaurant sector is important to the future vitality and viability of centres, it should not come at the expense of the centres' core shopping functions.

9.13 Town centre strategies which support the continued evolution of the high street are now vital. This should involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. Indeed, within Sevenoaks and Westerham, there is potential to build upon links with local tourist attractions.

9.14 It will be important for town centres to continue to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the new Local Plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. This is particularly important for Sevenoaks District's town centres, which do not have any centres with the scale of retail and leisure offer to compete with nearby higher order centres (particularly Bluewater), but do have heritage and tourism assets and other 'unique selling points' which can be capitalised on which some competing centres are not able to offer. Robust place-marketing strategies put in place to further support and develop the centres as visitor destinations.

The sub regional network

9.15 Sevenoaks District is surrounded by a number of larger centres — Bluewater Shopping Centre, Royal Tunbridge Wells, Orpington and Bromley — which exert an influence over shopping patterns and commercial leisure visits of residents in the District to varying degrees. There is no reason to assume that the 'higher order' centres which surround the County will lessen their influence over the comparison goods shopping patterns of residents in the District over the Council's Local Plan period, and it is for this reason our capacity forecasts (discussed below) are based on a 'constant market share' approach, i.e. we have not planned for the overall proportion of comparison goods expenditure which is retained in the catchment area to increase.

9.16 The most popular comparison goods shopping destination for residents in the survey area is Bluewater, which accounts for almost one-quarter of comparison goods spend available to the survey area. Bluewater is within the top 30 shopping destinations in the UK and is the 2nd highest ranked shopping mall in Venuescore's 2014-2015 rankings. Bluewater is performing well both as a location for comparison goods shopping and recreational/cultural activities. Bluewater has become a 'destination' location, as its offer has evolved beyond retail to include a Showcase Cinema, Spa and Beauty offer (this includes Beauty Salons, in store spas and Hair Salons), Pirate Cove Adventure Park and a number of clubs and classes (e.g. sewing at John Lewis). We therefore expect the influence of Bluewater to continue throughout the Plan period.

9.17 However, our comments have shown that the centres in Sevenoaks District are performing generally well (albeit each main centre has areas where improvements would be beneficial). In the remainder if this section we set out a series of strategic recommendations. These are designed to ensure that the vitality and viability of the District's network of centres is maintained and enhanced throughout the local plan period. Implementation of these recommendations will ensure the centres are in a robust position as possible to withstand the competition for spending presented by the key surrounding centres and assist in delivering vibrant town centres which meet the shopping and leisure needs of their respective catchments.

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District-wide recommendations

- **SD1 —** The Council should ensure that the core retail functions of the town and neighbourhood centres are protected and, where possible, enhanced. Active uses on ground floor frontages should be encouraged throughout primary and secondary locations, ensuring that contiguous frontages are provided, and avoiding changes of use which break up the run of facades.
- **SD2 —** The Council should plan for the below District-wide new comparison and convenience goods floorspace over the period to 2035:

	Floorspace requirement, 2025 (sq.m net)	Floorspace requirement, 2035 (indicative)(sq.m net)
Comparison goods	9,100	21,700
Convenience goods	9,000	10,300

- **SD3 —** The above floorspace figures should be reviewed at regular intervals throughout the Council's new Local Plan period, particularly once an agreed strategy for the distribution of new housing growth across the District (which will be set out in the Council's new Local Plan) is agreed.
- **SD4 —** It is recommended that figures in the latter half of the Plan period (i.e. beyond 2025) are considered indicative and should be subject to review and updating throughout the Plan period. This is because key inputs into the quantitative 'need' assessment (such as population, expenditure growth, and 'special forms of trading' such as online shopping) will invariably alter because of strategic changes and economic fluctuations. In parallel, patterns of shopping and leisure visits will also continue to involve as new development comes forward in competing centres.
- **SD5 —** The Council will need to ensure that there is a sufficient supply of sites to meet the full extent of quantitative 'need' outlined in Recommendation SD2. The 'need' for new floorspace should not be compromised by limited site availability.
- **SD6 —** Floorspace should not be allocated to out-of-centre locations, in order to protect the vitality and viability of the network of centres in the District.
- **SD7 —** The identification of sites to meet retail (and other 'main town centre uses', as defined by the NPPF) should be subject to the sequential test, and should, in accordance with the approach set out in the NPPF and Core Strategy, be directed towards existing defined town and service centres in the first instance, followed by appropriate and well-connected edge-of-centre sites.
- **SD8 —** In order to protect the network of town and service centres, it is recommended that a District-wide impact assessment threshold of 500 sq.m (net) should be adopted. This will help protect the network of town and service centres from inappropriate edge-of-centre and out-of-centre developments, ensuring that the local planning authority retains the greatest level of control in the decision-making process.
- **SD9 —** Our performance assessment has demonstrated that the existing network of town centres, service centres and service villages are performing a role which is consistent with their role and function in the retail hierarchy. The exception to this is Swanley, which is currently underperforming and has a retail offer more akin to that of a district centre. However, in light of the planned investment and regeneration which is expected to come forward, we consider that on balance its current classification should remain. Should this redevelopment not transpire, it is recommended that the Council reconsider classification of Swanley as a district centre.

Centre hierarchy	Centre(s)
Principal Town	Sevenoaks
Secondary Town	Swanley* (**subject to review during Local Plan period)*
Rural Service Centre	Edenbridge
Local Service Centres	Westerham, New Ash Green and Otford
Service Villages	Brasted, Crockenhill, Eynsford, Farningham, Halstead, Hartley, Hextable, Horton Kirby, Kemsing, Knockholt Pound, Leigh, Seal, Sevenoaks Weald, Shoreham, South Darenth, Sundringe and West Kingsdown.

- **SD10 —** The Council should continue to support its network of Service Villages as locations for meeting basic day-to-day shopping needs. Applications which seek to improve provision of day-to-day facilities (both in terms of retail, and other key facilities set out at Appendix I to this study) should be supported in principle providing they are of an appropriate scale and would not undermine the centre's position in the District's retail hierarchy.
- **SD11 —** The role of farm shops should continue to be supported as they make an important contribution to the rural economy. Applications for enhancements/improvements of facilities should be supported in principle, providing they are of an appropriate scale and would not undermine the existing hierarchy of centres in the District. Applications for extensions of farm shops which seek to provide new floorspace should demonstrate compliance with the sequential test, and, if proposing over 500 sq.m net of new retail/town centre uses floorspace (see **SD8**), also demonstrate compliance with the impact test.

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Permitted Development

9.18 In considering the above recommendations for supporting the vitality and viability of the network of centres in the District we draw attention to the fact that the Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. Of particular relevance, the amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities which restrict the amount of non-A1 units in a retail centre or frontage.

- **SD12 —** The Council's policy framework has effectively protected and enhanced the primary shopping area in recent years, and we recommend the proactive consideration of legislative controls to prevent such a change of use where considered inappropriate and harmful to the vitality and viability of the shopping frontage – i.e. the dilution of A1 uses underpinning footfall and connectivity across a centre. This recommendation is applicable to centres at all levels of the retail hierarchy in the District. Consideration should be given to the use of Article 4 directions to assist in the protection of primary shopping frontages.

Sevenoaks town centre recommendations

9.19 Having set out the general District-wide recommendations, below we set out a summary of the performance of Sevenoaks town centre and provide recommendations to take forward in the Council's new Local Plan. Our health check analysis of Sevenoaks town centre has confirmed that the centre continues for the most part to be performing well against key vitality and viability indicators. The centre has, a good retail mix, although there are qualitative gaps in the retail offer which do mean that the centre is possibly not as well-placed to compete with surrounding centres as it could be.

9.20 The results of the pedestrian on-street surveys undertaken in support of this study confirm that users of the centre visit for a variety of reasons, including both food and non-food shopping, as well as employment and other uses, whilst the results of the household telephone survey have indicated that Sevenoaks town centre has increased its market share from 14 of the 16 household survey zones since the previous survey of shopping patterns was undertaken in 2005, and its comparison goods sales density (turnover per sq.m) is £11,450 per sq.m. All these factors together indicate that Sevenoaks town centre benefits from a good level of vitality and viability.

9.21 There remain opportunities to improve the centre in order to secure its longer term vitality and viability, including the positive re-use of under-used peripheral areas, and the provision of a broader range of sizes of retail units, but for the most part Sevenoaks appears well placed to remain a healthy town centre. Continued loss of comparison goods expenditure to Bluewater will be inevitable — but if Sevenoaks town centre can continue to develop its own identity and more specialist offer, then the two locations should be able to mutually co-exist as comparison goods shopping destinations.

9.22 Continued promotion of the town's markets, heritage assets (including enhancement of linkages to the National Trust's Knole House and a strategy of joint promotion) and independent retail and food & beverage sector are likely to be particularly important in this respect, and will enable Sevenoaks town centre to remain resilient both to the trends in the wider retail sector discussed in Section 3, and also from the potential further threats to its market share which could arise from expansion of Bluewater, and/or enhancement of the retail offer in other surrounding centres.

- **STC1** — Continue to support and facilitate appropriate growth on sites in Sevenoaks town centre to support and enhance its function as the Principle Town centre in the District, and further develop and enhance the attractiveness of the retail and commercial leisure offer in the centre.
- **STC2** — The core function of Sevenoaks town centre as a comparison goods shopping destination should be protected and enhanced. This should be achieved through the development and implementation of robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — is retained. Such an approach will also ensure that Sevenoaks town centre is as best placed as possible to withstand the potential increased attractiveness from competing shopping destinations.
- **STC3** — Sevenoaks town centre should, along with Swanley, be the focus of the identified District-wide comparison goods capacity requirements of 9,100 sq.m net floorspace by 2025 / 21,700 sq.m net by 2035. Based on current performance, Sevenoaks town centre should support up to 7,200 sq.m net additional comparison goods floorspace by 2025 / 17,100 sq.m net by 2035.
- **STC4** — In the event that the above comparison goods floorspace requirements cannot fully be accommodated in Sevenoaks town centre, the balance should be directed towards Swanley town centre to support the Council's regeneration aspirations and the need to improve and enhance the retail floorspace in the centre.
- **STC5** — The Council should consider favourably proposals which seek to provide new comparison goods floorspace in Sevenoaks town centre. This could include modernisation

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/ amalgamation of existing units within the primary shopping frontage to provide larger-format units which may be more attractive to higher-profile operators.

- **STC6** — Sub-division of existing retail units within the primary shopping frontage should be resisted.
- **STC7** — Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversity the offer/mix in the centre.
- **STC8 —** Whilst it is recognised that there is some cinema provision in the form of the Stag Theatre, there is no solely devoted cinema facility in Sevenoaks District at present and the Council should work with landowners and operators to investigate the opportunity for introducing such a facility into the District. It is recommended that Sevenoaks town centre would be the most suitable location for this facility. A small-scale / 'boutique' cinema would likely be the most appropriate form of development.
- **STC9 —** Whilst we do not consider there to be a pressing qualitative need for the development of additional convenience goods floorspace in Sevenoaks town centre in the short term, owing to the positive qualitative need identified for new convenience goods floorspace in the Sevenoaks urban area, applications which seek to provide additional convenience goods floorspace and further enhance consumer choice should be supported in principle.
- **STC10 —** There is an opportunity for land to the east of High Street, taking in the bus stands adjacent to Boots, and the adjacent Buckhurst surface car park accessed from Suffolk Way / Akehurst Lane, to be redeveloped to accommodate some of the identified comparison goods floorspace capacity. A scheme on this site could also potentially take into account the demolition / redevelopment of the M&Co unit on High Street, which is under-used and offers redevelopment potential. Such a scheme would be dependent on the relocation of bus interchange facilities (and markets which operate from the car park) to a suitable alternative central site.
- **STC11 —** There is an opportunity for the Royal Mail sorting office/depot at London Road / South Park to be redeveloped to accommodate a mix of town centre uses which would contribute to enhancing the vitality and viability of the town centre to a greater extent than the current uses do. Reflecting its location adjacent to The Stag theatre and a number of restaurants on London Road, there may be scope for a small cinema facility (see **STC8**) to be accommodated as part of any redevelopment.
- **STC12 —** The Council should continue to invest in and support the Wednesday and Saturday markets in Sevenoaks town centre, as these provide an important complementary offer and act as footfall drivers. Opportunities should be explored for further promotion of the markets, broaden the range of special events (such as night markets, for example) and diversify the range of goods sold in order to further broaden its current offer.
- **STC13 —** A co-ordinated approach to place marketing and the promotion of special events in the town centre should be undertaken in conjunction with key stakeholders in the town centre, such as the Sevenoaks Town Partnership. There may be scope for 'branding' of areas of the town centre, such as the cluster of independent retailers between London Road and the High Street, as part of any place marketing strategy.
- **STC14 —** Whilst the environmental quality of Sevenoaks town centre is generally good, the Council should continue to invest in improving the public realm and visual appearance of the town centre, supporting a high quality public realm and good levels of pedestrian navigability.
- **STC15 —** Improvements to the linkages between the town centre and Knole House should be developed and implemented – both in terms of physical linkages (better directional signage for example) and joint marketing of the two locations as a 'destination'.

Swanley town centre recommendations

9.23 As our policy analysis established, the Council has long-standing ambitions for the regeneration of Swanley town centre and it is clear that, from our health check analysis, this need for regeneration remains. The centre has the ingredients for a successful town centre — a strong anchor store (in the form of a particularly large Asda store), a reasonable (albeit limited) range of complementary units, a pedestrianised shopping environment, and the provision of car parking in close proximity to the centre — but is currently underperforming against many of the health check indicators set out in the PPG.

9.24 The Council's regeneration aspirations for Swanley are expected to potentially introduce a significant new residential community into the area, and ensure to support sustainable patterns of shopping; this will further heighten the need for an improved retail offer in the centre. When combined with the fact that appears to be a limited supply of opportunity sites in Sevenoaks town centre (as discussed above) to support the District's identified comparison goods needs, there is a strong policy argument for the majority of the identified comparison goods need to be directed towards improving the retail offer in Swanley.

9.25 If the proposals for redevelopment in Swanley town centre do not come forward, we consider there may be a case for reclassification of Swanley as a district centre.

- **SWTC1 —** Continue to support and facilitate appropriate growth on sites in Swanley town centre to support and enhance its function as the Secondary Town centre in the District,

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and further develop and enhance the attractiveness of the retail and commercial leisure offer in the centre.

- **SWTC2 —** Support the redevelopment of Swanley town centre. Any proposals for the redevelopment of the centre should include the provision of additional comparison goods retail floorspace, to improve the diversity of uses in the centre, enhance its attractiveness, and assist in meeting the identified quantitative retail need this study has identified.
- **SWTC3 —** The core function of Swanley town centre as a comparison and convenience goods shopping destination should be protected and enhanced. The focus of Swanley Square should be on comparison goods and convenience goods, and applications for changes of use away from these should be carefully monitored.
- **SWTC4 —** The Council should develop and implement robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — comes forward in the centre.
- **SWTC5 —** Swanley town centre should along with Sevenoaks, be the focus of the identified District-wide comparison goods capacity requirements of 9,100 sq.m net floorspace by 2025 / 21,700 net sq.m by 2035. Based on current performance, there is a requirement for a minimum of 800 sq.m net by 2025 / 2,000 sq.m net by 2035 additional comparison goods floorspace to come forward in Swanley, but, reflecting the Council's aspirations for the regeneration of the centre and planned uplift in residential numbers, a greater proportion of the identified District-wide need should be allocated to the centre.
- **SWTC6 —** The Council should consider favourably proposals which seek to provide new comparison goods floorspace in Swanley town centre. This could include modernisation / amalgamation of existing units within the primary shopping frontage to provide larger-format units which may be more attractive to higher-profile operators.
- **SWTC7 —** Sub-division of existing retail units within the primary shopping frontage in Swanley town centre should be resisted.
- **SWTC8 —** Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversity the offer/mix in the centre.
- **SWTC9 —** Whilst we do not consider there to be a pressing need for additional convenience goods floorspace in Swanley town centre, there may be scope for additional provision to come forward within or well-integrated edge of the centre if a suitable site becomes available over the course of the Plan period, in order to assist in alleviating the over-trading of existing foodstores in the centre and enhancing consumer choice.
- **SWTC10 —** The Council should work with the owners of Swanley Square and other key landowners to help deliver a co-ordinated, uniform approach to improving the environmental quality of the centre, including public realm and wayfinding enhancements, the provision of additional green spaces / planting, public seating and so on. A coherent approach to other matters such as car parking prices would also be beneficial.
- **SWTC11 —** The Council will need to decide an appropriate strategy for the part of the centre which falls south of the railway line, on London Road/Station Road. We would not recommend that this area forms part of the defined primary frontage, but should be classified as secondary shopping frontage. The Council should secure investment to enhance linkages of the shopping facilities on London Road/Station Road with the rest of the town centre, in order for it to benefit to as great an extent as possible for any regeneration initiatives which are progressed.
- **SWTC12 —** The Council should continue to invest in and support the markets in Swanley town centre, as these provide an important complementary offer and act as footfall drivers. Opportunities should be explored for further promotion of the markets, broaden the range of special events (such as night markets, for example) and diversify the range of goods sold in order to further broaden its current offer.
- **SWTC13-** We note that a planning application for a retail and residential-led redevelopment of Swanley Square has recently been submitted.

Edenbridge rural service centre recommendations

9.26 Our analysis has demonstrated that Edenbridge town centre is displaying good levels of vitality and viability at present. The conversion of a former Co-Op store to a Waitrose has provided the town centre with a strong 'anchor' store, and the rest of the retail offer, including a number of specialist independent retailers and a particular focus on the antiques sector, is a further asset to the town. There are also a good range of supporting uses such as cafes and restaurants.

9.27 There is only one supermarket in Edenbridge capable of meeting main/bulk shopping needs, which is the in-centre Waitrose store. This store has a dominant effect on local convenience shopping, and there may be a qualitative case for additional provision in the town to improve consumer choice and introduce competition. However, development opportunities in and on the edge of the town centre are limited, and accordingly any applications for new development would need to demonstrate compliance with relevant national policy 'tests' (in respect of the sequential and impact assessment) in order to show that the vitality and viability of the town centre would not be adversely affected.

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- **ERSC1 —** The role and function of Edenbridge as a rural service centre should be protected and enhanced over the course of the Council's new Local Plan period.
- **ERSC2 —** The Council should not plan for the development of a significant quantum of additional comparison goods retail floorspace in Edenbridge, owing to the constrained nature of the centre and limited opportunities for expansion. Development of a significant amount of additional floorspace would also result in Edenbridge undertaking a role and function not in keeping with its classification as a rural service centre.
- **ERSC3 —** Applications which seek to enhance existing provision, or provide new retail floorspace appropriate in scale to the role and function of the centre should be supported in principle. Applications for the development of other 'town centre' uses should also be supported in principle where they will make a positive contribution to the vitality and viability of the centre, providing they are of a scale appropriate to the role and function of the centre.
- **ERSC4 —** The Council should develop and implement robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — comes forward in the centre.
- **ERSC5 —** Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversity the offer/mix in the centre.
- **ERSC6 —** The Council should seek to ensure that the Edenbridge continues to meet a broad a range of day-to-day shopping needs as possible, and therefore applications which would result in a reduction in the number of units in the centre (and therefore a reduction on the diversity of uses) should generally be resisted.
- **ERSC7 —** There is a qualitative case for introduction of additional supermarket provision in Edenbridge, of a scale appropriate to the role and function of the centre, in order to introduce competition and improve consumer choice. If this cannot be accommodated on an in-centre site, compliance with relevant national and local retail policy 'tests' (in respect of the sequential and impact tests) will need to be satisfactorily demonstrated.
- **ERSC8 —** The Council should ensure that if significant new residential growth comes forward at Edenbridge, it is supported by a sufficient range of local shopping facilities to enable sustainable patterns of shopping to be met. Any new retail floorspace which comes forward as part of a new residential development would be expected to meet local day to day shopping needs only (indicatively we would suggest between 500 and 1,000 sq.m net floorspace in total).
- **ERSC9 —** The Council should seek to deliver public realm / environmental enhancements to Edenbridge, to ensure its remains a vibrant and attractive centre. There is a particular need to deliver public realm improvements along High Street, and enhance linkages between High Street and the Waitrose store.
- **ERSC10 —** Edenbridge performs an important role as a specialist retail destination and the Council should continue to support, and where possible, promote this.

Local service centres recommendations

9.28 Our analysis has demonstrated that the other key settlements in the District — the local service centres of Westerham, New Ash Green and Otford — perform a role and function which is more orientated towards meeting day to day shopping needs. In the case of Westerham and, Otford, the vitality and viability of the centre is also supported by a good range of cafes, restaurants and similar complementary uses, and these should be supported, although this should not come at the expense of the core retail function in these centres.

9.29 New Ash Green is a centre which is struggling for vitality and viability compared to the other local service centres and a co-ordinated approach to bringing forward improvements to the centre, alongside local landowners, will be required. The Council may need to consider acquisition of land/assets in the centre to help progress the regeneration of the centre, as the fragmented ownership and lack of local landlords is likely to act as a barrier to any substantial improvements in the centre coming forward. However, the 'anchor' foodstore (the Co-op) is performing well, and some local shopping needs can be met. We would anticipate that, along with Swanley, New Ash Green will be the focus for the Council's regeneration activities over the course of the new Local Plan period.

- **RSC1 —** The role and function of Westerham, New Ash Green and Otford as local service centres should be protected and enhanced over the course of the Council's new Local Plan period.
- **RSC2 —** The Council should not plan for the development of a significant quantum of additional comparison goods retail floorspace in its network of local service centres. Development of significant additional floorspace would result in the centres' undertaking a role and function not in keeping with their classification in the Council's retail hierarchy.
- **RSC3 —** Applications which seek to enhance existing provision, or provide new retail floorspace appropriate in scale to the role and function of the centre should be supported in principle. Applications for the development of other 'town centre' uses should also be supported in principle where they will make a positive contribution to the vitality and

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viability of the centre, providing they are of a scale appropriate to the role and function of the centre.

- **RSC4 —** The Council should seek to ensure that the local service centres continue to meet a broad a range of day-to-day shopping needs as possible, and therefore applications which would result in a reduction in the number of units in the centre (and therefore a reduction on the diversity of uses) should generally be resisted.
- **RSC5 —** The Council should seek to deliver public realm/environmental enhancements to all of its local service centres, to ensure they remain vibrant and attractive destinations over the course of the new Local Plan period.
- **RSC6 —** In New Ash Green, in the short to medium term the Council should consider development of a centre-wide public realm strategy to improve the appearance of the centre and its attractiveness as a destination to meet local needs. In the longer-term, the Council may wish to investigate acquisition of units/sites in the centre in order to drive forward its regeneration.
- **RSC7 —** The Council should seek to enhance and promote 'unique selling points' of its network of rural and local service centres, for example:

  Westerham *— enhanced linkages with / joint promotion with Quebec House / Chartwell;*

  Otford / Westerham *— promotion as local food hubs, which could include specialist markets / events with local suppliers, encouragement of retailers to sell local produce, and so on.*

Monitoring and next steps

9.30 Our study has identified that the centres in the District benefit, for the most part, from good levels of vitality and viability, and whilst some centres have areas where improvements need to come forward, they are – for the most part - currently able to meet many residents' shopping needs. The Council should seek to continue to promote and enhance its network of centres throughout its new Local Plan period, and it is considered that the regeneration of the centres of Swanley and New Ash Green should form priorities for the Council.

9.31 The Council should ensure its retail capacity forecasts remain up to date throughout its new Local Plan period by refreshing its evidence base to take into account changes in population and expenditure projections, 'special forms of trading' forecasts, 'commitments' for new retail development and so on.

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