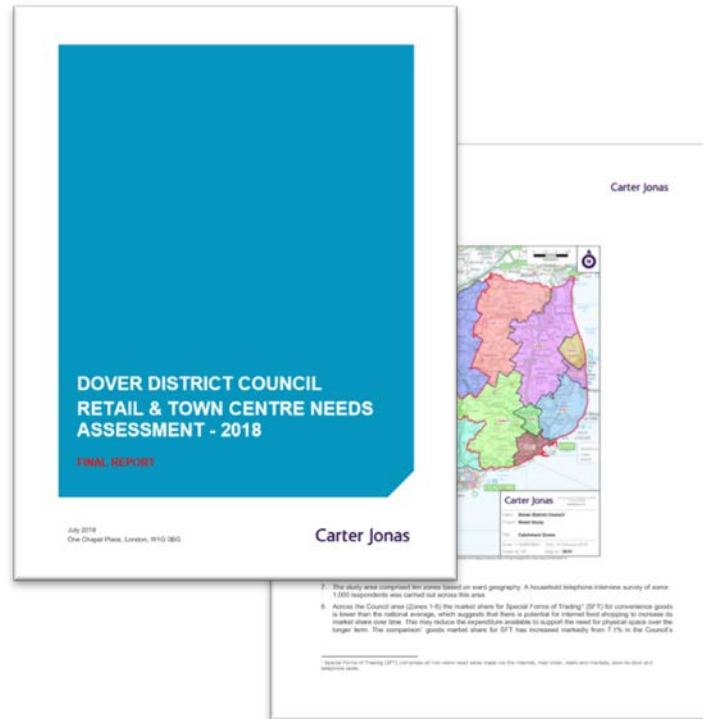


Retail & Town Centre Needs Assessment 2018



Purpose of Study

Prepare robust retail evidence base compliant with national policy and guidance

The NPPF states that:

“It is important that retail [and other town centre use] needs are met in full...

Local Planning Authorities should therefore undertake an assessment of need ... to ensure a sufficient supply of sites.” (para 23, NPPF)

Scope of Study

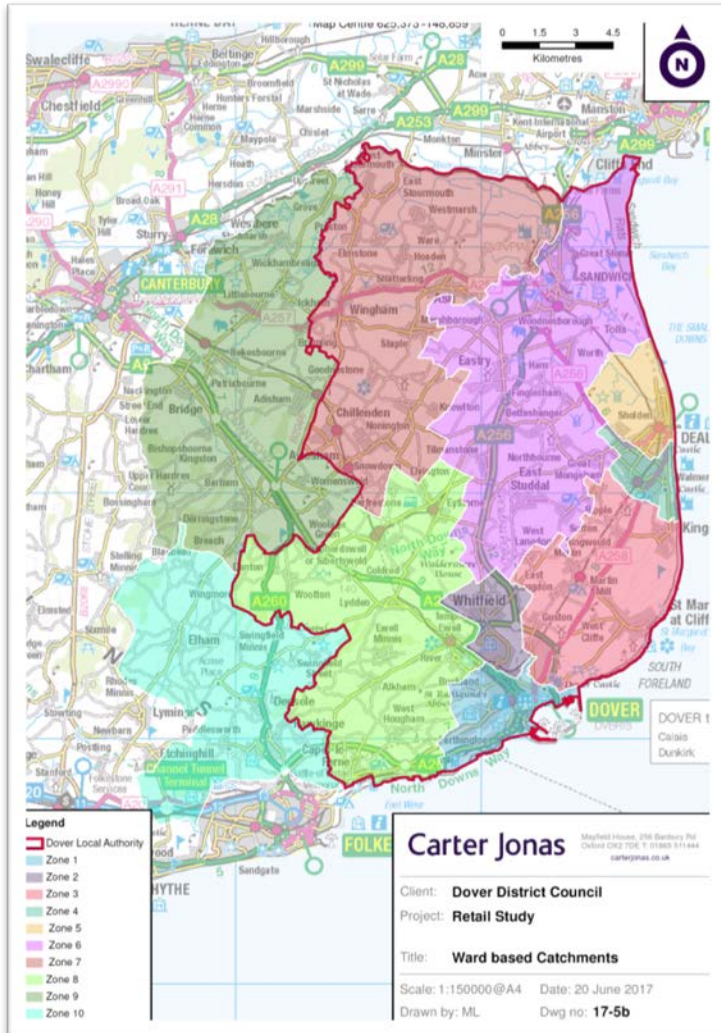
Update shopping patterns
& leisure preferences

Assess the 'health' of Dover, Deal
& Sandwich Town Centres

Assess the need for new retail
floorspace & leisure uses

Review shopping frontages &
town centre boundaries

Study Area & Zones



- 10 Zones (based on Ward Geography)
- 1,000 people surveyed
- Zones 1 – 8 are within the Council area

Key Findings

Growth in internet shopping

Decrease in retention and expenditure in centres



Vacancy Rates

	2012	2018
Dover	25.3%	15.2%
Deal	9.5%	5.8%
Sandwich	13.8%	5.4%

Retail Floorspace Needs Assessment

Comparison Goods: *no forecast*
District-wide capacity to 2037

Convenience Goods: *no forecast*
District-wide capacity to 2027. By 2032 there is capacity for 605sqm, rising to 3,127sqm to 2037

Leisure Needs Assessment

Adequate level of leisure facilities

Wider range of family activities

Dover Town Centre Healthcheck

Strengths

Accessible
Rich historic & maritime heritage
Diverse mix of multiple & independent operators

Weaknesses

High vacancy rate
Long and sprawling centre
Dissection between town centre & Waterfront
Visitors using the Port by-pass the town centre

Opportunities

Repositioning of town centre
Creation of a destination point
Investment in rejuvenation of town centre
A centre identified for inward investment & employment

Threats

Strong competition from other centres
Poor perception of current offer
Growth in internet shopping
Increasing vacancy rate

Deal Town Centre Healthcheck

Strengths

Low vacancy rate
Representation by major retailers
Strong multiple offer
Good environment quality

Weaknesses

Competing higher order centres
Compact town centre constrained by road network
Limited expansion opportunities

Opportunities

Promotion as a family & tourist destination
Improve connectivity
Support speciality markets and seasonal events
Capitalise on historic heritage

Threats

Increased competition from larger order centres (e.g. Dover)
Stagnation
Limited opportunities for further development

Sandwich Town Centre Healthcheck

Strengths

Historic centre with medieval heritage
Key visitor attraction
Golfing location
Complementary mix of multiple & independent retailers

Weaknesses

Lack of large scale modern retail units
Competing high order centres
Narrow road network
Compact town centre constrained by existing road network

Opportunities

Support & promote markets activity and seasonal events
Capitalise on tourism spend
Update street furniture
Improve parking for tourist coaches

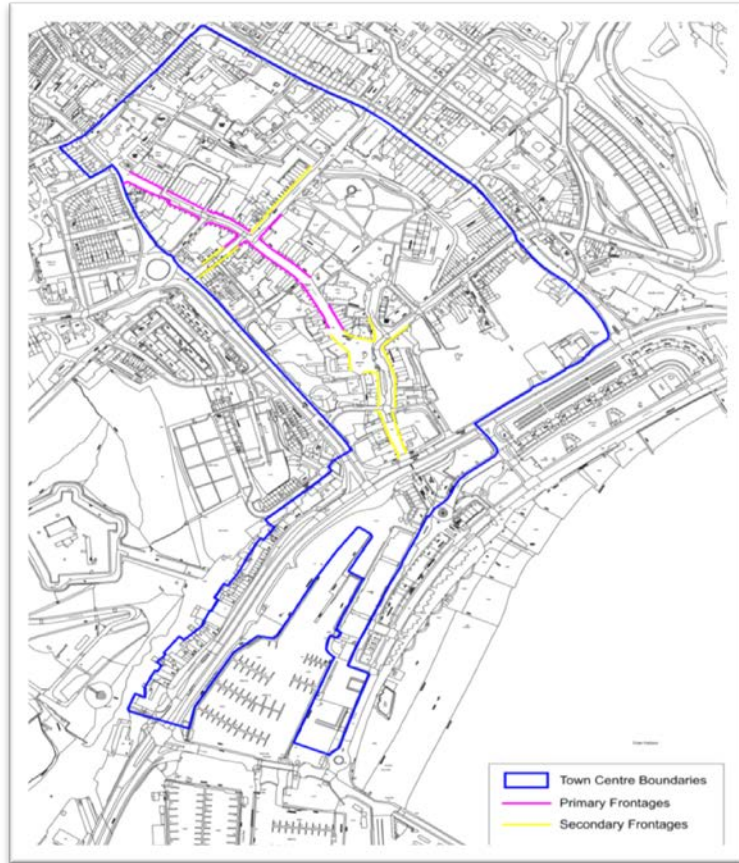
Threats

Increased competition from larger order centres (e.g. Dover)
Limited opportunities for further development
Lack of multiple retailer demand

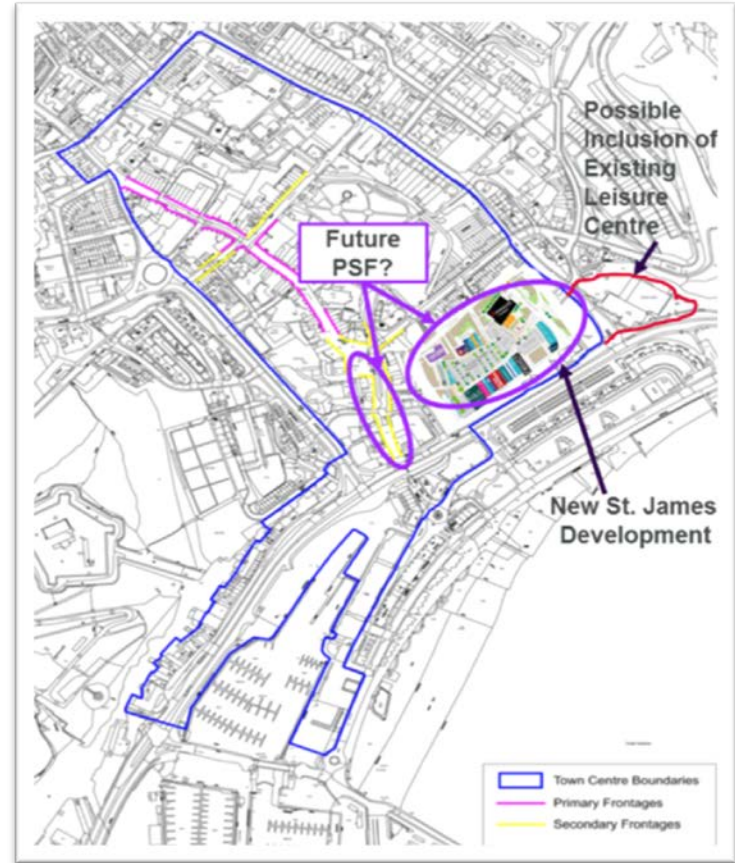
Consultants recommendations

Town Centre Boundaries & Shopping Frontages

Dover

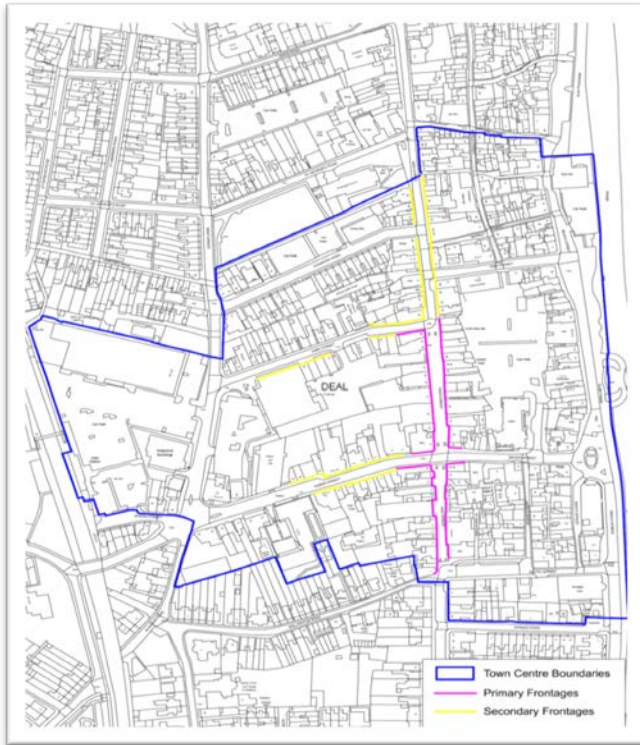


Existing

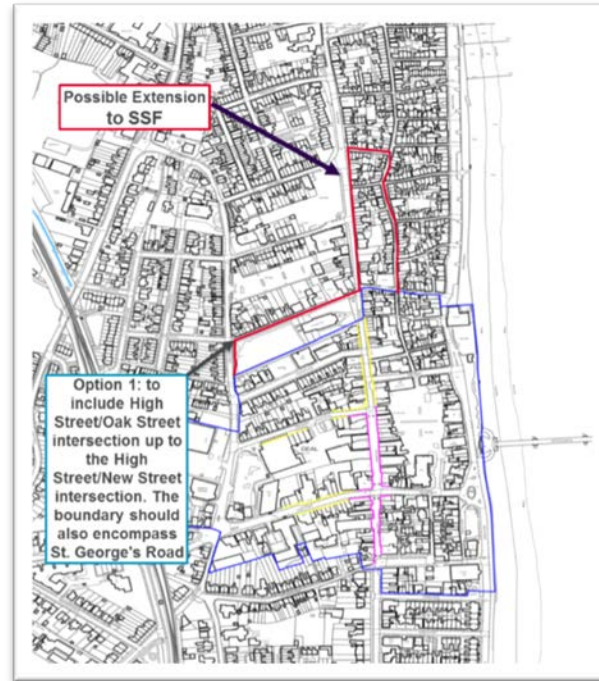


Option to consider as part of the Plan-making process

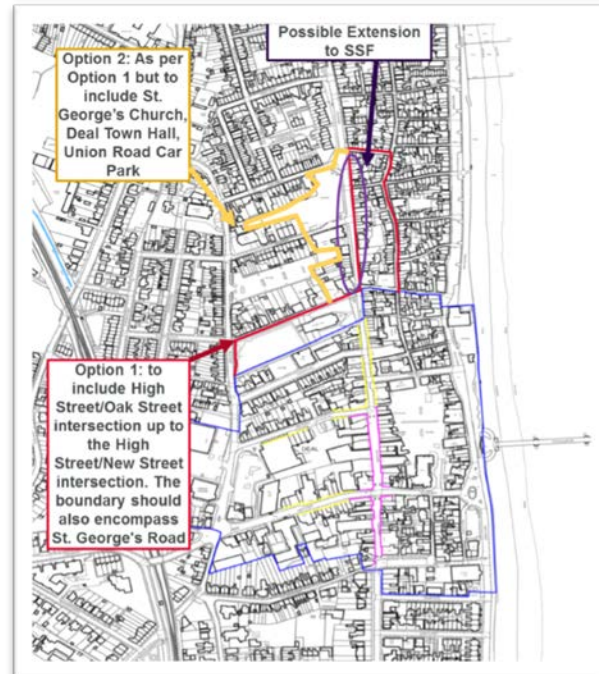
Deal



Existing

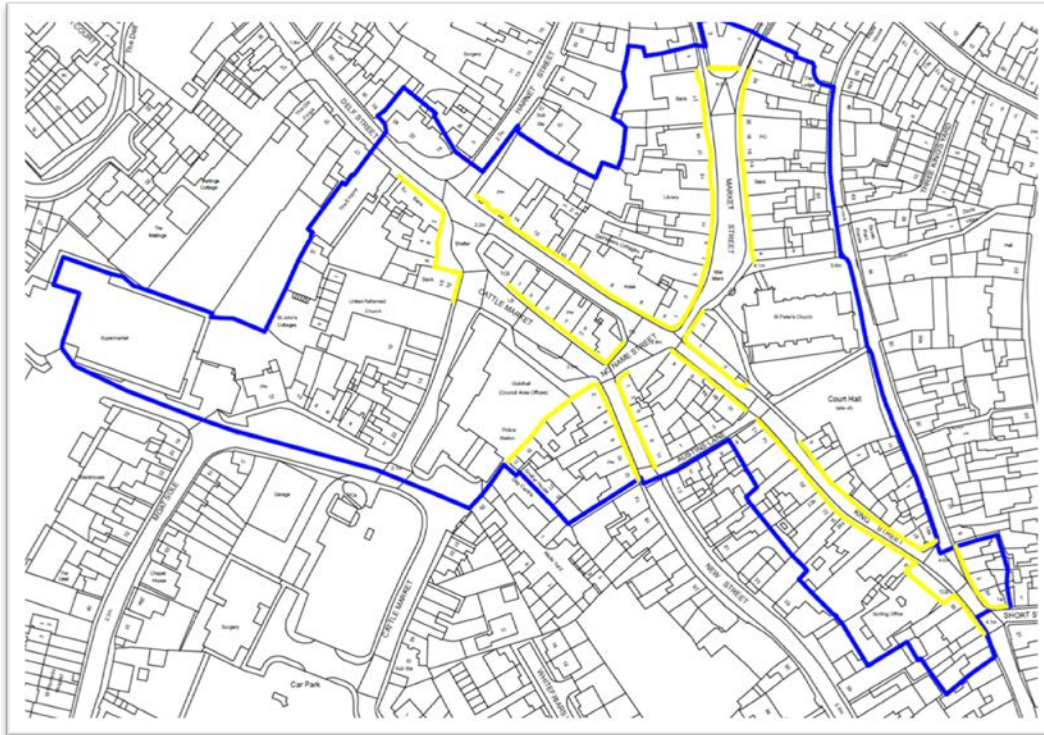


Option 1 – to consider as part of the Plan making process



Option 2 – to consider as part of the Plan-making process

Sandwich



Existing

No changes recommended as part of the Plan-making process

Considerations for new Local Plan

- Increase retention and 'claw back' expenditure in centres
- Commission an In-centre survey
- Marketing & promotion
- Town Centre Manager(s)