Town Centre Health Check Baseline Report & Needs Assessment

Sevenoaks District Council

March 2022

Contents

Appendices

1. Introduction

Scope and Purpose

1.1 This report has been prepared by Avison Young ('AY') for Allies & Morrison ('A&M') and Sevenoaks District Council ('SDC') in order to inform the Sevenoaks Town Centre Strategy ('the study') for the five main 'town centres' in Sevenoaks District: Sevenoaks, Swanley, Edenbridge, Westerham and New Ash Green. The report contains two main elements:

- an assessment of the key indicators of 'town centre' health, in order to form a baseline position for each centre; and
- an assessment of the need for retail floorspace in the above five settlements.

1.2 A review of the key health check indicators associated with the main 'town centres' in the District can assist with the formulation of individual town centre strategies based upon evidence base information associated with the land use profile of each centre, its market share for convenience and comparison goods, along with the usage of leisure facilities, plus the characteristics of usage of each centre. Similarly, an assessment of need for retail floorspace can assist in setting the context for: the current performance of each 'town centre'; key shopping patterns information; an assessment of the balance between quantitative demand and supply indicators; all of which can help shape the strategy for retail floorspace provision in each centre.

1.3 In order to inform the above issues, the following areas of empirical research have been undertaken. First, land use surveys in each of the five 'town centres', drawing upon data from Experian GOAD and AY's own surveys (undertaken in late 2021), including an examination of the occupation of units by different land use categories (and associated floorspace) plus comparison of both factors over time.

1.4 Second, a new survey of household shopping patterns has been commissioned[1]. The survey covers a wide geographic area, across the whole of Sevenoaks District and beyond, and has gained information on convenience and comparison goods shopping patterns, destinations for key leisure activities, along with the usage of the five main town centres in the District. Third, an in-street survey has been conducted[2], which has interviewed a sample of visitors to each of the five main 'town centres' and gained information on the usage of each centre. Further information on the scope and content of each of these pieces of empirical research can be found in Section 4 of this report.

1.5 It should be noted that the most recent review of town centre health and retail floorspace provision in the District is contained in the Sevenoaks District Council Study, November 2016 ('the 2016 retail study'). Reference is made to the salient contents of the 2016 retail study, which is a document intended to form

[1] the household survey was undertaken in November 2021. In total 804 interviews were conducted across 8 zones, with circa 100 interviews in each zone.
[2] Interviewing was conducted in October 2021. A total of 388 interviews were conducted. 109 in Sevenoaks, 75 in Edenbridge, 78 in Swanley, 75 in Westerham and 51 in New Ash Green.

part of the evidence base library for the development plan. However, parts of this study will supersede the content of the 2016 retail study.

Contents of this Report

1.6 The remainder of this document is structured in the following manner:

- Section 2 provides a review of the changes in national planning policy and legislation since the 2016 retail study insofar as they are relevant to retail and main town centre land use issues.
- In Section 3 we provide a review of recent / current retail trends which are likely to have an influence on the formulation of town centre strategies across the District, including changing trends in retail expenditure forecasts since the 2016 retail study and the potential impacts associated with the on-going COVID-19 pandemic.
- Our review of town centre health issues can be found in Sections 4-9:
    - the methodology for, and content of, the health checks can be found in Section 4;
    - our review of the key health indicators is as follows: Sevenoaks (Section 5), Swanley (Section 6), Edenbridge (Section 7); Westerham (Section 8); and New Ash Green (Section 9).
- Finally, our assessment of retail floorspace need issues can be found in Section 10.

1.7 All plans, statistical information and other documents referred to in the main text of this report can be found in appendices contained at the rear of this document.

2. Planning Policy Context

Introduction

2.1 A key element of developing strategies for the main 'town centres' in Sevenoaks District is an understanding of the prevailing planning policy context. The prevailing planning policy context helped to frame the recommendations in the 2016 retail study and a similar approach should be taken for this current study.

2.2 Therefore, this section outlines the salient parts of national planning policy and legislation insofar as they relate to retail and town centre issues and explains the changes which have occurred since the completion of the 2016 retail study. In particular, this section summarises the salient parts of national planning policy (in the National Planning Policy Framework), national guidance in the Planning Practice Guidance, along with recent changes in planning legislation which have the potential to affect the future planning of town centres and the management of land uses within them.

The National Planning Policy Framework ('NPPF') (July 2021)

2.3 At the time of the 2016 retail study, the original 2012 version of the NPPF was the main source of national planning policy. However, the NPPF has since been revised and updated again in February 2019 and July 2021. Therefore, it is important to record the changes in national policy since the completion of previous evidence base documents in order that it can inform advice on the content of the various town centre strategies across Sevenoaks District.

2.4 The changes between the 2012 and 2019/2019 versions of the NPPF, insofar as they relate to retail and town centre issues, are as follows:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the updated versions of the NPPF has clarified the issue of availability of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses.
- The revisions to the NPPF have deleted the formal requirement for local authorities to define primary and secondary retail frontages in development plan. The latest NPPF still requires local authorities to define town centre boundaries and primary shopping areas in defined 'town centres'.
- Whilst the requirement to allocate sites to meet identified needs remains, the revised NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised. This could have implications for the assessment of retail floorspace need later in this study (i.e. up to 2032, rather than 2035 as in previous study).
- The revised NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited).

2.5 Finally, the one notable amendment in the July 2021 version of the NPPF is the revision to national policy on Article 4 Directions. The existence of Article 4 Directions has been in place for some time and they are used to restrict permitted development rights in certain specific instances, across a range of land uses and for various different reasons. The revised version of paragraph 53 of the NPPF notes that:

"The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible".*

2.6 Updated national planning policy does not loosen the tight controls over the imposition of Article 4 Directions, although given the changes to the use classes order and permitted development rights (see later in this section), the government has acknowledged that Directions may be appropriate in focused parts of certain town centres where the loss of certain main town centre / Class E uses would undermine town centre health.

National Planning Practice Guidance ('NPPG')

2.7 Following initial publication in 2014, the NPPG on town centre planning policy was updated in July 2019 and again in September 2020. The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues.

Legislation: Permitted Development and the Use Classes Order

2.8 In recent years, in response to the on-going challenges faced by town centres and high street retailers (and other commercial uses), national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although, over time, further flexibility was been introduced in order to allow for changes, in certain circumstances, between some main town centre land use classes.

2.9 Since the 2016 retail study there have been two major changes in national legislation. First, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect on the 1st September 2020 and revoked Parts A and D of the existing use classes order. The second involved further changes to permitted development rights.

2.10 In relation to retail and main town centre uses and the use classes order, the changes were as follows:

- A new Class E was introduced which encompasses the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)3.
- The former A4 and A5 uses have now become sui generis uses, along with part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls. The remaining former Class D2 uses (community halls, swimming pools, skating rinks and outdoor sport and recreation uses) are now placed into Use Class F2.
- The uses within the former Class D1 are split between the new Use Class E (health care uses, creches, day centres) and the new Use Class F1 (schools, museums, libraries, halls courts and places of worship).

2.11 Following the September 2020 use class order changes, the Government has now introduced permanent changes to permitted development rights (following a transitional period between September 2020 and July 2021), which focus upon changes to residential use, refinement of rights in relation to office to resident use, and the expansion of rights under the new class MA. These came into effect from 1st August 2021.

2.12 The key aspects of the August 2021 changes can be summarised as follows:

- Previous permitted development rights under classes O and M (office to residential and retail to residential) ended on 31st July 2021.
- The introduction of the new class MA (business and commercial to residential) and its expansion to include the whole of Use Class E (shops, offices, restaurants/cafes, health services, gyms, nurseries and leisure).
- Permitted development to change from Use Class E (commercial, business and service) to a use falling within Use Class C3 (dwellinghouses) will be subject, in certain circumstances, a number of prior approvals. There will also be limitations / exclusions, including the introduction of a size limit of 1,500sq m per building. Previously, in relation to the change from office to residential, there was no upper size limit.
- The automatic exclusions to this new right include buildings on land covered by, or within the curtilage of, designations such as SSSIs, Listed Buildings, a scheduled monument, an AONB, or a World Heritage Site. It is notable that Conservation Areas are not included in these automatic exclusions.
- In order to take advantage of this new right, a developer must apply to the local planning authority for a determination as to whether prior approval of the authority will be required in relation to one or more of the following factors:
  - transport
  - noise

[3] Not involving vehicles or firearms

  - flooding
  - contamination
  - residential amenity
  - in the case of buildings located in Conservation Areas[4] consideration to be given to the impact of the change of use on the character or sustainability of the Conservation Area.

- It will also be noted that there has been a key change by the new Class MA: the removal of any consideration of the impact on the high street (for existing uses falling within the new Use Class E5). This has the potential to be very significant for town centre high streets.

- To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. However, there is some debate as to whether the building must have been in the same use or mix of uses for the two year period.

- The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A prior approval application can be made to change the use of part of the building only. The vacancy test applies to the building, but as the definition of a building in the GPDO relates to part of a building this might mean the vacancy test is only required for the part of the building to be converted. However, there is nothing in the regulation to stop a landlord making the property purposely empty, and no requirement to demonstrate the property has been marketed to prospective tenants in its current use, leaving many to suspect it will not present a significant barrier to take-up of the new right.

- The permitted development right under Class MA does not include any building operations (i.e. it does not include the external alterations allowance that was afforded by Class M). This means that a building must be both standards compliant from the outset but also capable of being converted in its current form. It is therefore considered by some that planning permission will be required in the majority of cases for external alterations to the building, including new doors and windows and other external details.

2.13 It should be noted that these changes have attracted some controversy in some parts of the property and built environment sectors, with a key focus being on their effect on the future of town centres. Whilst limitations and conditions remain in place, there is a general sense of concern in some quarters that some high streets could potentially suffer and this may have prompted the inclusion of specific reference to town centres in Article 4 Direction policy in the July 2021 version of the NPPF.

[4] involving the change of use of part or all of the ground floor of the building
[5] up until 31st July 2021 the 'impact on the high street' was a test for prior approval for uses outside of Class E

3. Retail Trends

3.1 In order to provide a robust evidence base library on retail and town centre issues for this study it is important, in our opinion, to set the context in terms of recent, current and potential future trends in the economy.

Overview

3.2 The outbreak of coronavirus (Covid 19) and measures to contain it have had a considerable impact on the UK and global economies, seeing three national lockdowns, and some form of restrictions on economic life for almost 24 months. Over this period, the economy suffered an unprecedented contraction; 600,000 fewer people were employed and over 9 million employees were furloughed. Consumer demand suffered during this time, given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel. In addition, investment fell markedly, as waning business confidence and deteriorating financial positions led to the postponement and cancellation of projects.

3.3 Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees. The temporary closure of factories and businesses meant disruptions to supply chains, reverberations of which remain on-going. Since then, a steady recovery in services, manufacturing and construction have all seen the UK's GDP rise above its pre-pandemic level as of November 2021. However, the behavioural shifts due to Omicron concerns weighed on economic activity into December 2021 and January 2022. Further into the year, the pace of the rebound remains uncertain and the sustainability at risk given inflationary headwinds.

3.4 A number of factors will weigh on the recovery over the coming months. Less likely is the renewal of economic restrictions in the form of a lockdown; however, the emergence of a 'variant of concern' may raise this likelihood in addition to inducing more cautious consumer behaviour. Lingering fears about the virus could prompt such behaviour from households and businesses, fuelling voluntary social distancing.

3.5 The success of the Coronavirus Job Retention Scheme ('CJRS') meant that any sharp spike in the unemployment rate did not materialise, at least immediately. Whilst a positive labour market outlook with soaring vacancies should lubricate the wheels of the economic recovery, a slight rise in unemployment may still emerge as redundancy periods are worked through following the CJRS lifting.

3.6 The bigger risk is considered to be rising inflation and wages not able to keep up, constraining the recovery in household incomes. Inflationary pressures and tax rises in force from April 2022 will impose a cost of living squeeze, subduing confidence while at the same time making way for tighter monetary policy. Given this, and whilst the prospect of a double dip recession is likely to be avoided, the recovery is expected to be subdued over the coming months during 2022. GDP declined by close to 10% in 2020 before recovering by 7% in 2021. The latter result is flattered by the base effect of the sharp contraction in 2020. 2022's growth is expected to decelerate further, leaving the UK's GDP some 3% below the pre-pandemic trend in the long term.

3.7 Due to the unpredictable nature of the global pandemic, there is some degree of uncertainty over the scale and duration of a future out-break and the likely economic consequences of the measures needed to limit contagion. Hence, forecasts are likely to be subject to greater than usual uncertainty and volatility.

Consumer spending

3.8 Household spending rose by 2.7% quarter on quarter in the third quarter of 2021, making the largest contribution to expenditure, following the easing of public health restrictions. Spending on hospitality, travel and leisure all rose over this period. Retail, despite being a star performer during the pandemic, experienced weaker performance over this period of easing restrictions as consumers substituted away from durable goods to services. Experian has forecasted that this substitution from durable goods to services will persist, as inflationary pressures are higher in the former category, as compared to the latter. This will weigh on retail spending growth in the near term.

Retail

3.9 Retail sales volumes, despite being an area of economic activity with the swiftest recovery to pre-pandemic levels, has more recently lagged, with volumes falling the most since the third lockdown, in December 2021.

3.10 Sales remained elevated through the second half of 2021, though have since tailed off, as consumers substituted away from durable goods consumption, instead spending more in areas of the economy that had been, up to that point, locked down, i.e. travel and leisure.

3.11 Hence, and as corroborated by the latest statistics, the biggest contributor to the most recent decline were non-food stores (includes department, clothing, household goods and other non-food stores). Additionally, sales of automotive fuel suffered with the reinstatement of work from home guidance in 2021, removing commuting costs for many office-workers. Signifying its relative strength, online sales have remained high in proportional terms, though this category of goods also saw sales volumes contract.

3.12 Looking ahead, spending growth over the rest of 2022 is expected to weaken as worsening economic headwinds affect consumer fundamentals. The start of the Russia-Ukraine conflict is also likely to have impacts across a number of sectors, particularly in fuel/energy costs.

3.13 A tight labour market and wage growth that will struggle to keep pace with inflation will place stress on incomes, curbing consumer spending appetite. With inflation expected to peak at 6.5% in April 2022, concomitant with a rise in National Insurance contributions and lifting of the Ofgem energy price cap, cost pressures will mount. Against this backdrop, convenience spending will continue to perform relatively well as eating out remains subdued and significant numbers of households continue to work from home.

3.14 Prospects for comparison goods remain weak as discretionary spending is curbed but some product areas should buck this trend. For example, heightened residential repair and maintenance activity could provide a temporary boost for related products such as DIY equipment, household goods and furnishings. Also, the shift to greater spending online for both convenience and comparison goods is expected to persist in the near term, with any correction materialising upon the lifting of all public health measures.

4. Town Centre Health Check Methodology

Introduction

4.1 In order to review and assess the health of the five main ‘town centres’ in District, a targeted review of three town centre health check indicators has been undertaken over the course of preparing the baseline review element of this study. These are:

- the land use profile of each ‘town centre’, both now and over time;
- the shopping patterns associated with each ‘town centre’, alongside shopping patterns associated with edge of centre and out of centre retail facilities in each settlement; and
- data on the usage of each ‘town centre’ across a basket of key indicators.

4.2 This section explains the actions which have been undertaken in order to gather the above information.

4.3 From the outset it should be noted that data on some of these indicators was included in the 2016 retail study and, therefore, part of the series of actions undertaken for the baseline review has been to compare data gathered in 2021 for this study with the content of the 2016 retail study. This section explains how this comparison has been undertaken.

Land Use Profile

4.4 A key element of understanding the health of a ‘town centre’ is to review its land use profile. Some data on land use was provided in Section 5 of the 2016 retail study, which was based upon Experian GOAD’s Category Report surveys of: Sevenoaks, Swanley, Edenbridge and Westerham. Experian do not undertake regular surveys of New Ash Green and therefore GVA undertook its own survey and observations of the centre as part of the completion of the 2016 retail study.

4.5 The Experian GOAD Category Report surveys provide data across the following land uses in each centre:

- Comparison goods retail
- Convenience goods
- Retail service uses
- Leisure service uses
- Financial and business service uses
- Vacant outlets

4.6 In order to provide a time-series analysis, our health check review of each centre covered by the Experian GOAD survey provides the following:

- a review of the amount of units in each of the above categories at the time of the 2016 retail study and also the latest available survey from Experian (plus an AY update in November / December 2021).
- a comparison between both sets of data with the respective national averages for each category at that time.
- a review of the change in each category over time, in terms of the number of units and the relationship to any changes in the national averages.

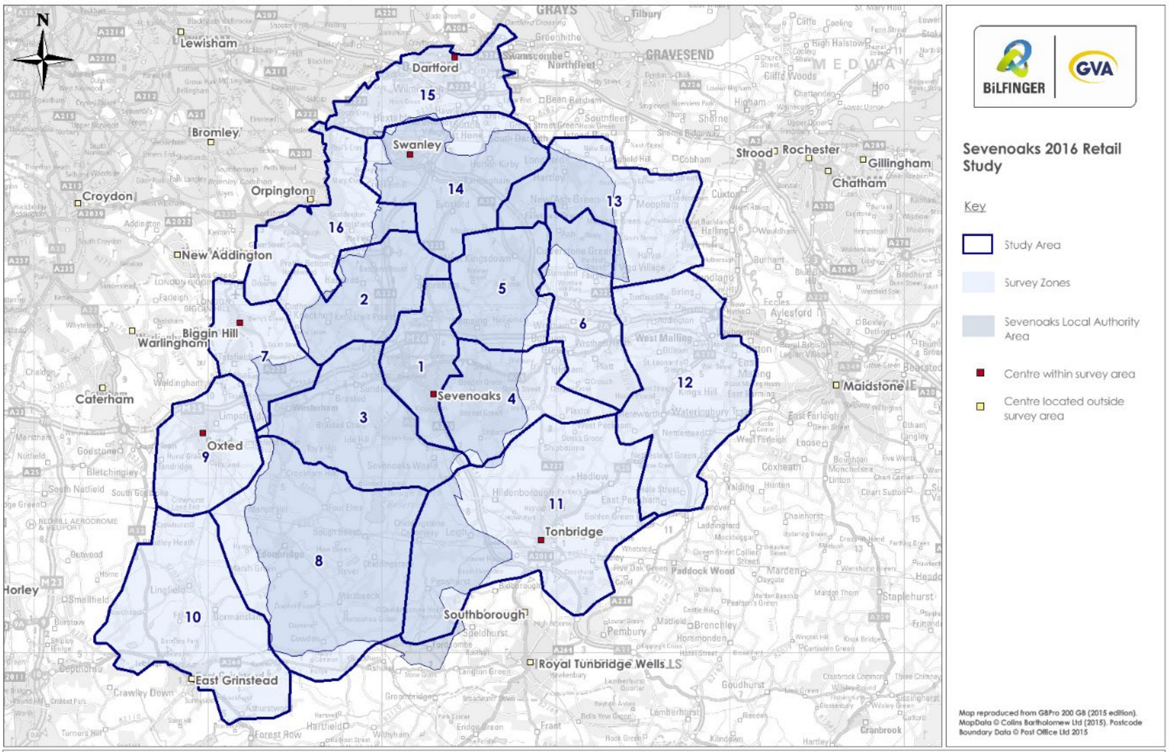
4.7 The same is undertaken for the amount of gross floorspace (in square feet) in each centre covered by the Experian GOAD surveys.

Shopping Patterns

4.8 In order to inform the assessment of town centre health and also the assessment of ‘need’ for retail floorspace across the District, the 2016 retail study was supported by a survey of household shopping patterns. The survey was commissioned jointly by the Council and GVA and took place in May 2016 (‘the 2016 household survey’).

4.9 The extent of the 2016 household survey is shown in Figure 4.1 below.

Figure 4.1: geographical area covered by the 2016 household survey



Study area and household survey zones

4.10 As can be seen from the above plan, the 2016 household survey covered a wide area, going beyond the administrative boundary of Sevenoaks District, and was divided into 16 separate survey zones. This approach assisted in the assessment of the need for additional retail floorspace and allowed data to be collected which was specific to different parts of the District.

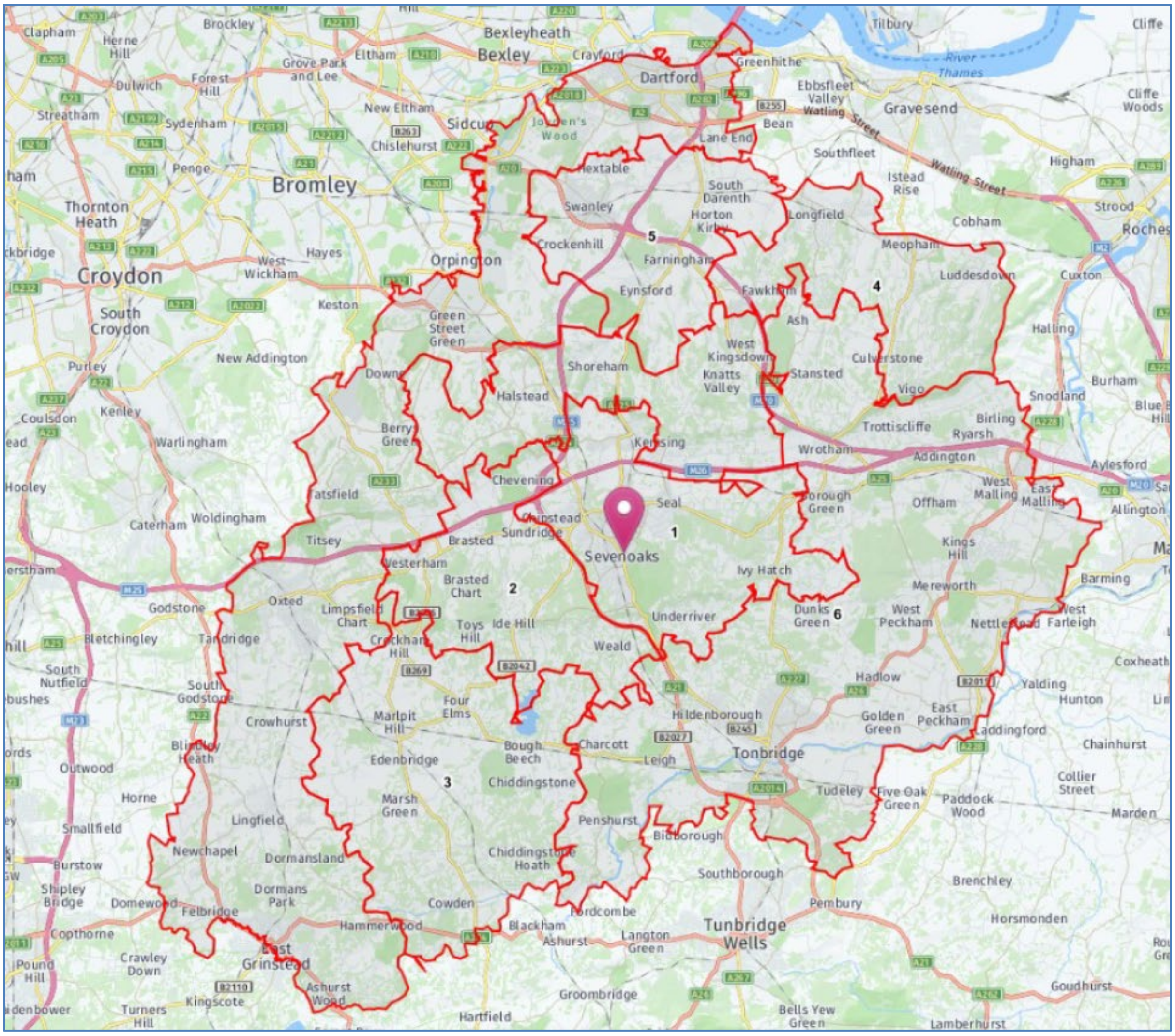
4.11 Whilst the current town centre strategies document is intended to serve a different purpose to the 2016 retail study, the agreed scope for this current study allows for the commissioning of a new survey of household shopping patterns ('the 2021 household survey'). The agreed scope of the 2021 household survey covers the following parameters:

- The 2021 household survey covers the same overall geographic area as the 2016 household survey.
- In order to ensure that the commissioning of the 2021 household survey can be accommodated into the overall budget for this current study, the number of separate individual survey zones has been reduced from 16 to 8. The approach which has been taken ensures that the five main Sevenoaks 'town centres' retain their own individual survey zone, whilst the peripheral zones have been amalgamated into three zones. This approach is shown on the plan at Figure 2 below.
- In relation to the questionnaire for the 2021 household survey, the following principles have been adopted:
  - the 2016 household survey contained questions regarding main and top-up convenience goods shopping. This principle has been carried forward into the 2021 household survey (in order to provide a time series analysis) and has been expanded to include first and second choice main and

top-up convenience goods shopping destinations in order to take into the possibility that residents of the survey area use more than one destination for their main and top-up food shopping.

- we have also adopted the same comparison goods shopping topics as the 2016 household survey, in order to provide a time series analysis. However, like convenience goods, the comparison goods shopping questions have been expanded to include first and second choice shopping destinations.
- in order to understand whether convenience goods shopping makes a contribution to other destinations (including town centre health), the 2021 household survey has included a series of questions regarding linked trips. These have ascertained whether linked trips take place and, if they do, the purpose and destination of these trips.
- in order to supplement content of the new in-street survey (see later in this section), the 2021 household survey has included a series of questions regarding the usage of the main town centre. These questions have been targeted across specific geographic areas (for example, survey respondents in Zone 1 were asked specific questions regarding the usage of Sevonoaks town centre.

Figure 4.2: 2021 household survey area and zones



4.12 The results of the 2021 household survey have been compared against the 2016 survey in the health check assessments to show how usage of the town centres has evolved over time.

4.13 The results of the 2021 survey have also been summarised for the purposes of the quantitative need assessment, with further information on the approach which has been taken to be found later in this baseline review.

Usage of the Town Centres

4.14 Alongside the 2021 household survey, a new in-street survey ('the 2021 in-street survey') has been commissioned for the purposes of this study. The 2021 in-street survey has been commissioned primarily to inform the baseline health check assessment review and has included a series of questions covering the following topics:

- main and secondary purpose of visit to the town centre
- linked trips with other purposes

- amount of money spent by goods category
- mode of travel to the centre
- length of stay in the centre
- types and specific names of shops and services visited
- frequency of visits to the centre (including evening visits)
- likes, dislikes and areas for improvement for each centre
- impact of COVID-19 on visits to each centre.

4.15 The structure of the 2021 in-street survey allows for a comparison with the results of the 2016 in-street survey.

5. Sevenoaks – Health Check Indicators

Summary of Conclusions from 2016 Retail Study

5.1 With regards to the key aspects of the health of Sevenoaks town centre, the 2016 retail study made the following observations and drew the following conclusions:

- 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.
- In terms of the fashion retail offer, 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 men’s 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 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.
- Sevenoaks has a good representation of services, including a number of estate agents and a good range of banks located within the town centre (Natwest, HSBC, Barclays, Nationwide and Halifax).
- In terms of food stores, Sevenoaks has a large Waitrose store, 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 other major town centre food stores include a Tesco Metro located on High Street. and a food hall within the Marks and Spencer store.
- In terms of leisure, the offer within Sevenoaks appears proportionate to the size of 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 no purpose-built cinema facility located within Sevenoaks town centre.
- A variety of markets add further diversity to the town centre offer and make a positive contribution to the vitality and viability of the town centre. A general market takes place every Wednesday on Buckhurst car park and sells a wide range of fresh produce, plants, flowers and household goods. On Saturday, the market takes place along the length of the High Street.
- At the time of the 2016 retail study, 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.

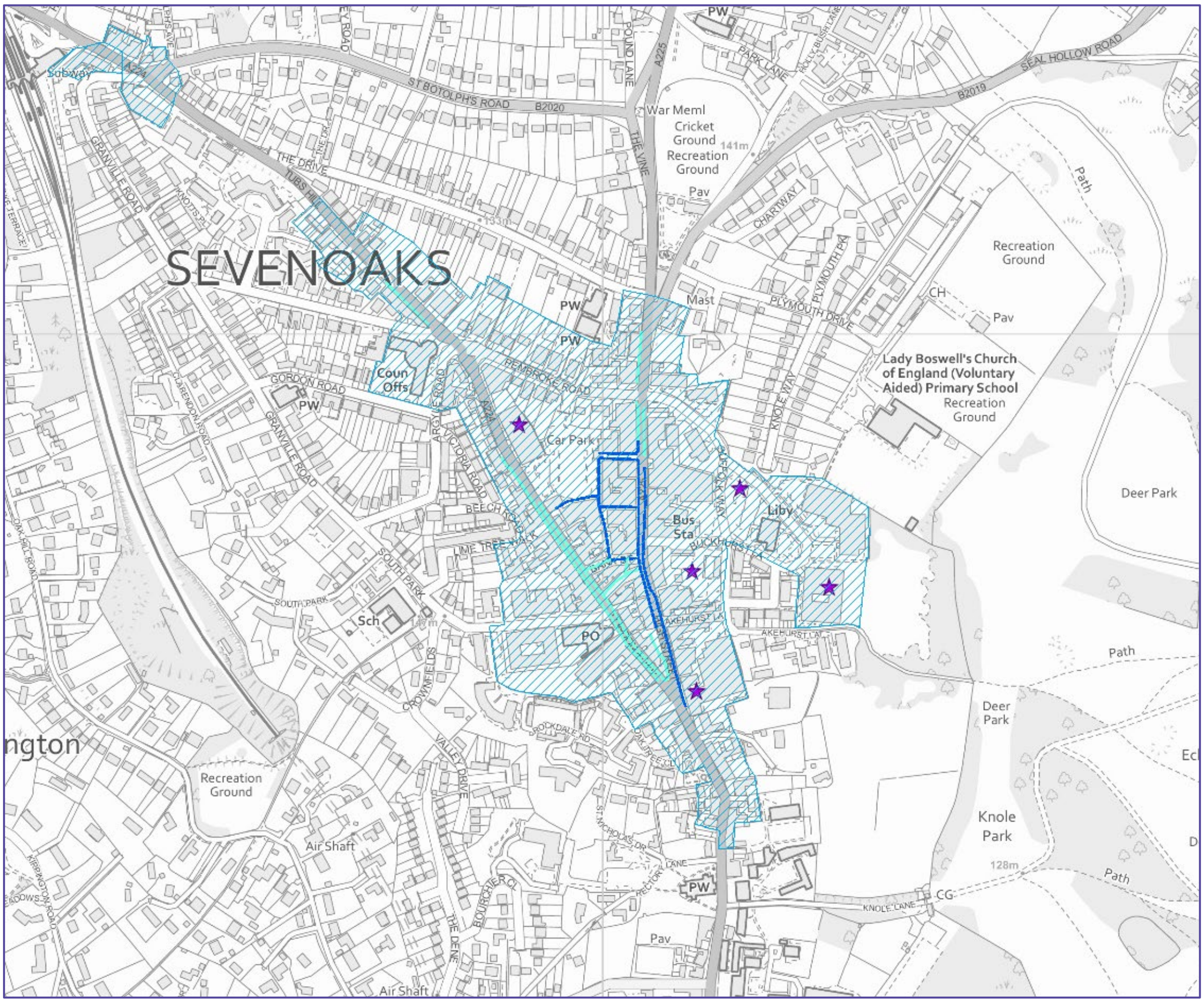
- Edenbridge is centred upon the High Street which is on the B2026. As the centre is a linear settlement there is not much on street parking. There is however a good level of parking provision within the Waitrose car park, which is free for 2 hours regardless as to whether the car driver is a Waitrose 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. In terms of public transport, Edenbridge town centre is a short walk from the two train stations which serve the town. The centre is served by buses that go to Tonbridge, Royal Tunbridge Wells, Oxted, East Grinstead, Sevenoaks and Hever.

Structure of the Town Centre

5.2 The polices map for the development plan defines a town centre boundary for Sevenoaks, along with primary and secondary frontages.

- the defined town centre boundary covers a reasonably wide area, extending along High Street from the junction with Rectory Lane in the south to the Vine recreation ground in the north. To the east of High Street the defined boundary extends across the library, leisure centre and multi-storey car park area. A significant part of London Road (to the west of High Street) is also included in the town centre boundary (from the junction with High Street in the south to the junction with Pembroke Road in the north). The Council offices / police station and Tubs Hill are also included.
- with regards to primary frontages, these are defined on the policies map as running along both sides of High Street from Blighs Road to the junction with London Road, along with units in the Blighs Meadown development.
- Secondary frontages are defined along the central and southern parts of London Road, plus Dorset Street and the western part of Bank Street.
- The extent of the above areas is shown in the extract from the policies map in Figure 5.1 below.

Figure 5.1: extract from development plan policies map for Sevenoaks town centre



5.3 The policies map also identifies a number of 'town centre areas of change', including four to the east of High Street and the car park site in the northern part of London Road. These are referred to in Policy LO3 of the Core Strategy, which notes that:

"A mix of uses (including retail, offices, cultural, leisure, hotel and residential development) will be retained and enhanced within the town centre. The historic form and character of the town centre will be maintained. Approximately 4,000 sq. metres net of new shopping floorspace (including approximately 1,700 sq m of convenience and 2,300 sq m of comparison floorspace) will be provided in the town centre up to 2026. This will include redevelopment of land west of Blighs Meadow for a mix of uses including residential, commercial and retail and in the longer term redevelopment of land east of the High Street for retail and related uses. New development in the town centre should be of a scale consistent with the existing character of the centre and should contribute to improving the quality of the town centre environment. Town centre car parking will be managed to ensure adequate and convenient provision for shoppers and appropriate provision for long stay parking".

5.4 The supporting text to Policy LO3 provides further information in relation to these areas and notes:

"1. West of Bligh's Meadow on the north western side of the town centre. A mixed use development is proposed including residential flats, commercial, retail and café/restaurant use, together with the relocated market. The town centre commercial uses will adjoin the Bligh's Meadow car park and complement the existing shopping provision. The development will bring more residential development into the town centre and improve the appearance of a relatively unattractive part of the centre. The scheme offers a range of benefits and will be brought forward early in the plan period.

2. East of the High Street adjoining Buckhurst Way. This area primarily contains surface parking and service yards. Most of the land is Council-owned and offers scope for retail development of at least the scale envisaged in the Retail Study together with related town centre uses closely linked to the High Street. Redevelopment would need to provide for replacement decked car parking. In accordance with the findings of the Retail Study this is a longer term opportunity proposed for development later in the Core Strategy period after 2019, although there could be scope to develop earlier if justified by demand. Proposals will be included in the Allocations and Development Management DPD with a Planning Brief to be prepared at a later date to lead the development of detailed proposals".

5.5 Further allocations are contained within the Allocations and Development Management Plan ('ADMP') document, including:

- the Post Office / BT Exchange site on South Park: allocated for a range of employment, retail, residential and community land uses (with active retail/town centre uses incorporated at least on the ground floor on the South Park frontage of this scheme. Residential uses are likely to be in the form of apartments above the ground floor, duplexes or townhouses).
- employment allocations: four separate areas, including High Street, London Road, Lime Tree Walk and South Park.

Land Use Profile

5.6 A key element of understanding town centre health is to examine the land use profile of a centre. Land use information was provided in the 2016 retail study and we have expanded upon this analysis in Table 5.1 below to show the land use information available at the time of the 2016 study, the most recent (June 2020) survey from Experian GOAD and AY's update performed in December 2021. For the avoidance of doubt, the data which has been used conforms to Experian's 'category' report classification of town centres.

Table 5.1: land use composition of Sevenoaks town centre - units

Sector	June 2015			June 2020			November 2021		
	No.	%	Ave (%)	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	10	4.6	8.6	13	5.7	9.2	13	5.7	9.2
Comparison	91	39.6	32.0	88	38.4	27.2	87	37.8	27.2
Retail Service	39	17.0	14.0	39	17.0	15.6	39	17.0	15.6
Other Retail	0	0.0	0.1	0	0.0	0.1	0	0.0	0.1
Leisure Services	33	14.4	23.6	36	15.7	24.5	37	16.1	24.5
Financial & Business Services	39	17.0	10.6	33	14.4	9.2	31	16.1	9.2
Vacant	18	7.8	11.2	20	8.7	14.1	23	10.0	14.1
Total	**230**	**100**	**100**	**229**	**100**	**100**	**230**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification . Figures may not add due to rounding.

5.7 The contents of Table 5.1 above provides the following information:

- there has been a small increase in the number of convenience goods uses in the centre, from 10 to 13, although the proportion of such uses remains below the national average.
- there has been a small rise in the number of comparison goods retailers in the town centre over the past six years. In 2015, comparison goods retailers comprised around 40% of all surveyed units, which was above the national average of 32%. The proportion of comparison goods retailers has remained above in the national average in 2021 (38%, compared with 27%) and the gap between the two has increased.
- in relation to the various types of service uses, there has been a decline in the number/proportion of financial/business services, but which remain above the national average, whilst there has been no change in the number of retail services and an increase in the number of leisure services in the centre. The proportion of retail services in the centre is slightly above the national average, whilst the proportion of leisure services is well below its respective national average.
- between 2015 and 2021 the number of vacancies in Sevenoaks town centre has increased from 18 to 23 of all surveyed units. Despite this increase, which has been steady over the past six years, the proportion of vacancies in the centre remains below the national average.

5.8 The same exercise has also been performed for gross floorspace areas in the town centre and this is contained in Table 5.2 below.

Table 5.2: land use composition of Sevenoaks town centre - floorspace

Sector	**June 2015**			**June 2020**			**December 2021**		
	No.	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**
Convenience	70,100	15.8	15.2	44,900	9.8	15.4	44,900	9.8	15.4
Comparison	138,200	31.1	35.9	152,500	33.3	31.0	152,100	33.2	31.0
Retail Service	34,600	7.8	6.7	36,600	8.0	7.2	36,700	8.0	7.2
Other Retail	0	0.0	0.1	0	0.0	0.1	0.0	0.0	0.1
Leisure Services	118,700	26.7	24.4	119,400	26.1	25.6	119,900	26.1	25.6
Financial & Business Services	62,900	14.1	8.0	58,300	12.7	6.9	56,800	12.4	6.9
Vacant	20,200	4.5	9.0	46,300	10.1	13.3	48,200	10.5	13.3
Total	**444,700**	**100**	**100**	**458,000**	**100**	**100**	**458,600**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification. Floorspace figures given in gross ground floorspace, square metres. Figures may not add due to rounding.

5.9 Based upon the above survey data, the amount of convenience goods floorspace in the town centre has fallen significantly between 2015 and 2021, which can be attributed (partly) to the closure of the Tesco Metro store. The proportion of floorspace occupied by convenience goods retailers in the centre is at around two-thirds of the national average.

5.10 The overall proportion of floorspace occupied by service uses of different types has remained reasonably static between 2015 and 2021 and in line with the collective national average for all service uses. It is notable that the proportion of floorspace occupied by leisure service uses is closer to the national average than the proportion of units in this particular use, suggesting that leisure service uses occupy larger units.

5.11 In contrast to the slight fall in the number of comparison goods retailers, the amount of space in the town centre has increased between 2015 and 2021 and now occupies around one third of all surveyed ground floor floorspace.

5.12 Like the number of units, there has been an increase in the amount of vacant floorspace between 2015 and 2021, but the proportion of vacant floorspace remains below the national average. However, the amount of vacant floorspace in the town centre has more than doubled between 2015 and 2021.

Shopping Patterns

5.13 In order to inform the 2016 retail study a survey of household shopping patterns was undertaken. The results of this survey were summarised for the purposes of the assessments of quantitative and qualitative need, although the results are also useful for the assessment of town centre health. A new household survey has been conducted in late 2021 and the results of the two surveys are compared below.

5.14 As noted elsewhere in this study, the two surveys use slightly different levels of geography and therefore the results of the 2016 survey have been re-based in order to match the content of the 2021 survey.

5.15 The ‘headlines’ from the 2016 survey are as follows:

- Sevenoaks lies in Zone 1 of the 2021 survey area, which is an amalgam of Zones 1 and 4 of the 206 survey. When the data (for 2016) for Zones 1 and 4 is combined then the 2016 survey shows that Sevenoaks town centre had a 19.9% share of first choice main food shopping trips from Zone 1/4 residents, with 17.3% of this total attracted to the Waitrose supermarket. In relation to second choice main food shopping destinations, the town centre had a higher market share at 35.8% from Zone 1/4 residents, with the Waitrose claiming 14.8% of trips from local residents. The Tesco Metro store attracted 5.6% of second choice main food trips from Zone 1/4 residents and 8.7% for the Marks & Spencer Foodhall.
- These market shares indicate that, as of 2016, grocery stores located outside of the town centre had a higher market share of main food trips. The Tesco and Sainsburys supermarkets accounted for 64.1% of first choice main food trips from Zone 1/4 residents and 36.9% of second choice main food trips. The Lidl store accounted for 9% of first choice and 17% of second choice main food trips.
- 9% of residents of Zones 1/4 used the internet as their first choice main food shopping destination in 2016.
- In relation to top-up food shopping, Sevenoaks has a 35% share of trips from residents of Zones 1/4 which is split relatively evenly between the two Waitrose stores (High Street and Tubs Hill), Sainsburys Local, Tesco Metro and Marks & Spencer stores.

- In relation to first choice destinations amongst Zones 1/4 for different types of comparison goods shopping, the 2016 survey provided the following market shares for shopping trips to Sevenoaks town centre:
  - — clothing and footwear: 25.3%[6]
  - — furniture, floorcoverings and textiles: 11.0%
  - — DIY: 11.4%
  - — domestic appliances: 20.2%
  - — smaller electrical products: 14.2%
  - — health and beauty: 63.1%
  - — recreational goods: 54.1%

- Beyond the local area, the results of the 2016 household survey indicated that Sevenoaks town centre was also able to attract comparison goods trips from other parts of the study area including reason market shares for first choice clothing/footwear trips from Zones 2 (19.7%), 3 (6.4%), 6 (6.9%) and 7 (11.4%). Across each of these zones, Bluewater is able to attract a higher market share, with 37.6% of all first choice clothing/footwear trips across the whole of the study area attracted to Bluewater.
- with regards to the wider catchment of the town centre for other comparison goods, the 2016 survey results show a lower market penetration rate concentrating upon Zones 2 and 7, although a reasonable amount of trips are also attracted from Zone 6 for health/beauty and recreational goods.
- The 2016 household survey also asked specific questions around the usage of Sevenoaks town centre. The results of the survey provided the following information:
  - — 42.4% of those people indicating that they visited Sevenoaks town centre most often did so at least once a week.
  - — the most popular main purpose for the visit was comparison goods shopping (38.3%), followed by food shopping 22.3% and then food/beverage uses (8.3%).
  - — in relation to secondary reasons for visiting, these were wider, with comparison goods shopping remaining most population (24.8%), followed by food shopping (19.7%) and food/beverage visits (19.2%), leisure (10.8%) and visits to financial services (9%).
  - — 88% of visits to the town centre travelled by car, followed by 4.9% walking and 6% using public transport.
  - — for those visiting the town centre by car, the most popular destination was Blighs Meadow (37.6%), Waitrose (10%) and Marks & Spencer (7.9%).

[6] Bluewater had a 39.7% market share of clothing/footwear trips

- the 2016 survey also asked about the usage of leisure facilities, with Sevenoaks town centre gaining the following market shares amongst Zones 1/4 residents:
  - cafes: 68%
  - restaurants: 55%
  - pubs/clubs: 28%
  - cinema (the Stag Theatre): 46%
  - health and fitness: 49%

5.16 The 2021 household survey included similar questions to the 2016 survey, proving the following results:

- 17% of those Zone 1 residents surveyed chose Sevenoaks town centre as their first choice main food shopping destination. This is split between the two Waitrose stores (with the store next to the station now attaining the higher market share) plus a low 1.7% market share for the Marks & Spencer Foodhall. The 2021 survey results indicate that some first choice main food trips are attracted from residents of Zones 2 and 6 of the study but it is relatively limited.
- the town centre attracts a higher market share of second choice main food trips from Zone 1 residents, at 36.8%. Two -thirds of this total is taken up by the two Waitrose stores, with the remaining third attracted to the Marks & Spencer store. Beyond the local area, these stores attract reasonable amounts of second choice main food trips from Zones 2, 6 and 7 of the study area.
- in relation to top-up food shopping trips, the 2021 household survey gathered data on first and second choice trips. As a first choice destination, Sevenoaks town centre attracts a market share of 47% amongst Zone 1 residents, although the only stores to have an influence beyond Zone 1 are the Tubs Hill Waitrose and Mark & Spencer stores (attracting a modest amount of trips from Zone 2). Amongst Zone 1 residents , around half of the (first choice) market share is attributable to the Tubs Hill Waitrose store. For second choice top-up food trips, the town centre attracts the same market share (47%), with the survey showing a greater influence by small stores, the Sainsburys Local and Marks & Spencer.
- The 2021 survey repeated the earlier question about grocery shopping via the internet from the 2016 survey and found that 13.8% of Zone 1 residents surveyed used the internet as their first choice main food shopping destination. This can be compared with an overall market share of 20.5% across the whole of the study area, indicating that local Sevenoaks residents are more likely to shop at a ‘physical’ store than residents of the surrounding area.
- for comparison goods shopping, the 2021 household survey provides the following market share data (excluding shopping via the internet) for first choice trips associated with Zone 1 residents is as follows:
  - clothing and footwear: 22.8%
  - furniture, floorcoverings and household textiles: 12.1%
  - DIY goods: 16.9%
  - domestic appliances: 29.8%

— smaller electrical goods: 20.2%

— health and beauty goods: 45.9%

— recreational goods: 49.9%

— Like the 2016 survey, the 2021 household survey results show that Bluewater shopping centre remains a significant competitor for Sevenoaks amongst residents of Zone 1 for clothing and footwear shopping, with a 49.9% market share (which is twice as high as Sevenoaks). However, for other types of comparison goods shopping, Bluewater has much less of an influence.

- in relation to shopping via the internet, a comparison between the 2016 and 2021 surveys is performed later in this section, although the market share of first choice trips amongst Zone 1 residents is as follows:

  — 43% clothing and footwear

  — 38% furniture, floorcoverings, household textiles

  — 39% domestic appliances and smaller electrical goods

  — 16% health and beauty

  — 40% recreational goods

  — the results of the survey also indicate that there is a modest trend in the local area to shopping more on-line following the easing of COVID restrictions. Whilst 72% of Zone 1 respondents indicated that they would shop for the same amount on-line, 17% indicated that they would shop more on-line as opposed to 2% less.

- in order to provide an indication of the usage of Sevenoaks town centre, the 2021 household survey seeks to replicate some of the earlier questions from the 2016 survey (plus a number of additions). The results of the 2021 survey indicate that, amongst Zone 1 residents:

  — 65.8% of local residents visit Sevenoaks town centre at least once for any purpose. The most popular reasons given for visiting the centre are broad, including non-food shopping 52%, main food shopping (34%), top-up food shopping (26%), visiting the Post Office (16%), and food/beverage uses (45%).

  — with regards to the impact of the COVID-19 pandemic, the results of the 2021 survey found that 73% of local residents do not intend to change their behaviour in terms of visits to the centre, with an equal split between the remainder visiting more or less often (13%-14%). The reasons given for visiting less often include feeling less safe (32.6%) and the greater use of on-line shopping 24.5%.

- Finally, respondents to the 2021 household survey will also asked about this usage of leisure facilities. Amongst Zone 1 residents, 89% visited Sevenoaks town centre for cafes and restaurants, with 65% visiting the centre for pubs/clubs. 65% of local residents visited The Stag Theatre for watching films (alongside 22% travelling to the Odeon in Tunbridge Wells and 7% travelling to Bluewater), whilst 71% visited the town centre for health/fitness purposes.

5.17 Based upon the above data, the following comparisons and observations can be made:

- there has been a small reduction in the town centre's share of first choice main food shopping trips, with market share being re-distributed following the closure of the Tesco Metro store.
- there has been an increase in the centre's share of top-up food shopping trips from the local area, from 35% to 47%.
- The internet has had a significant influence over certain types of non-food shopping in the local area. For example, the first choice location for clothing/footwear goods amongst Zone 1 has doubled between 2016 and 2021. The share of the internet for shopping for domestic appliances has increased from 27% to 39%, whilst the share for smaller electrical goods has grown from 25% to 39%. The share of shopping for health/beauty goods via the internet has grown from 7% 16%, whilst the share for recreational goods has grown only slightly from 35% to 40%.
- When internet shopping is stripped out of the data, the market share of Sevenoaks town centre has held up well for clothing/footwear shopping, experiencing only a small fall from 25% in 2016 to 22% in 2021.
- there has been a small drop in the proportion of local residents visiting Sevenoaks town centre at least once a week, from 75% in 2016 to 65% in 2021. Alongside this trend, there has been a widening of the types (and associated popularity) of uses visited by local residents. Non-food shopping remains the most popular reason for visiting, with food shopping remaining second, although visits to food/beverage outlets and other services are becoming more popular. Indeed, the market shares associated with film-going and eating/drinking in the town centre have risen over the past five years.

Usage of the Town Centre

5.18 In addition to the results of the new household survey, the new (2021) in-street survey provides additional information on the usage of Sevenoaks town centre and can be compared with the results of the 2016 in-street survey.

5.19 The results of the 2021 in-street survey provide the following information:

- with regards the main purpose of visits to Sevenoaks town centre, the 2021 survey indicates that the most popular reason, by a small margin, was non-food shopping (29%), closely followed by food shopping (27%). 10% of survey respondents visited the centre for socialising and 12% visited for work/business. only 5% indicated that the main purpose of their visit was for eating/drinking, although this may have been influenced by the timing of the data collection during the day.
- in relation to secondary reasons, these were slightly broader, with food shopping being most popular (19%), followed by non-food shopping 12%), eating/drinking (6%) and window shopping (5%). 35% of survey respondents indicated that there was no secondary purpose to their visit to Sevenoaks town centre.

- survey respondents were asked to provide an indication of the average amount of money spent per visit on different types of goods and services, with the following data on the gathered:
  - food/groceries: £18.5
  - clothing: £8.0
  - health / beauty: £2.1
  - other non-food items: £6.6
  - food / drink at cafes / restaurants: £3.4
  - services: £1.2
- 64% of survey respondents travelled to the centre by car, with 9% using the bus and 21% walking.
- 70% of survey respondents travelled up to 15 minutes to get to the centre, with 26% travelling between 15-45 minutes.
- the average amount of time spent in the town centre is circa 90 minutes, with 42% of survey respondents spending up to one hour in the centre.
- in relation to the types of shops and services visited by survey respondents, the most popular were: foodstores (50%), restaurants/cafes (15%), general stores/newsagents (9%), banks/building societies (12%), charity shops (12%), chemists (17%) and clothing/fashion shops (13%).
- 63% of survey respondents indicated that they visited food shops in the town centre at least once a week, with 52% of this group indicating that the also visit other shops and services on the same visit. The most popular linkages associated with food shopping were with banks/building societies (18%), charity shops (17%), chemists (25%), clothing stores (35%), household goods shops (13%) and restaurants/cafes (18%). A similar set of questions was asked in relation to linkages with non-food shopping trips to the town centre, although the level of linkage was materially lower at circa (25%).
- the most popular individual shops and service outlets were: Waitrose (24%), Marks & Spencer (37%), Boots (24%), Poundland (9%), the market (7%) and WH Smith (5%).
- Whilst it should be borne in mind that the in-street survey was undertaken during the day, the contrast between the level of visits to Sevenoaks town centre is significant, with 79% visiting at least once a week during the day and only 4% visiting at least once a week during the evenings. 60% of in-street survey respondents do not visit the town centre in the evenings.
- Finally, in-street survey respondents were asked about their use of Sevenoaks town centre as a consequence of the effects of the COVID-19 pandemic. 58% indicated that there would be no change the amount they visited the centre, with 18% visiting more often and 23% visiting less often.

5.20 When compared with the results of the 2016 in-street survey, the following is considered to be relevant:

- it remains the case that non-food shopping is the main reason for visiting Sevenoaks town centre, closely followed by food shopping.

- Whilst the closure of the Tesco Metro store does not appear to have had a significant negative effect upon the popularity of Sevenoaks town centre as a food shopping destination, it was, at the time of the 2016 survey, by far the most popular store in the town centre and its closure has led to a noticeable redistribution of food shopping trips to Waitrose and Marks & Spencer.
- there has been little change in the split between mode of travel to the town centre, with the car remaining most popular (followed by walking trips), although the average time taken on a trip to town centre has reduced from circa 20 minutes to circa 15 minutes. There has also been a shortening of the amount of time survey respondents spend, on average, in the centre, from 146 minutes to 90 minutes. On this latter point, there may be various reasons for the shortening of the average dwell-time, including 'centre specific' issues, the impact of the COVID-19 pandemic on shopping behaviour, and also the impact of shopping via the internet on the amount of time people require in town centres. These points also apply equally to those other centres in the District which are also experiencing shortening dwell-times.

Conclusions

5.21 Based upon the foregoing analysis, the following conclusions can be drawn in relation to the key health check indicators for Sevenoaks town centre:

- The land use profile of the town centre reinforces Sevenoaks town centre's role as the primary comparison goods shopping in the District. The centre has seen a small decrease in the number of retailers, although it is nowhere near as sharp as the national (downward) trend. Vacancies, whilst increasing slightly over the past six years, remain below the national average, although the amount of vacant floorspace has more than doubled between 2015 and 2020.
- The role of Sevenoaks town centre as a comparison goods destination is reinforced by part of our quantitative assessment, with a 2022 study area derived turnover of circa £109m, which is around five times as high as the total turnover of the other centres in the District such as Edenbridge and Swanley. The centre attracts expenditure across all comparison goods categories although non-bulky comparison goods categories comprise the majority of turnover.
- A different picture emerges in relation to convenience goods shopping associated with the town centre. The centre attracts around £27m of expenditure from the study area, with the town as a whole attracting £208m. The Waitrose is the only store able to attract a reasonable amount of main food shopping trips and there has been a modest shift over the past five years from main food to top-up food shopping. The closure of the Tesco Metro store will, no doubt, have had an influence on this trend, not least because Tesco was one of the most popular stores in the town centre at the time of the 2016 retail study.
- Despite its important role in the District, Sevenoaks does still dual competition from the growing influence of internet shopping and surrounding settlements, with the survey data suggesting a shorting in the amount of time spent in the centre and a slightly lower frequency of visit. Nevertheless, the town centre retains a strong level of usage for some leisure/service uses including cinema-going and food/beverage outlets.

6. Swanley – Health Check Indicators

Summary of Conclusions from 2016 Retail Study

6.1 The 2016 retail study made the following observations regarding some of the key health indicators for Swanley town centre:

- Swanley is the secondary town in Sevenoaks District and is located close to the edge of Greater London, in close proximity to Dartford. Around the time of the 2016 retail study a planning application was submitted to the Council for the partial redevelopment[7] of Swanley Square, which forms the principle shopping area of the town centre.
- As noted above, the focus of the retail offer in Swanley is centred upon Swanley Square, which is a purpose built, pedestrianised 1960's shopping centre. There is also 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.
- Anchored by a large Asda store (5,460sq m net), Swanley Square has a good range of value retailers including Wilko, the Card Factory, Poundland, Superdrug and Iceland. The centre also offers a range of services, including banks, chemists and a range of food/beverage outlets and take-aways. There is also an ALDI foodstore (650sq m), located on the edge of 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 services, including take-aways and beauty salons, and has a poorer quality built environment.
- The latest available town centre land use data from Experian GOAD at the time of the 2016 retail study suggested that Swanley had a low vacancy rate of 2.3%[8], which was 8.9 percentage points below the national average of 11.2% at that time. At the time of the 2016 retail study a review of the town centre found that there were no concentrations of vacant units/floorspace, with 241 sq m of a surveyed 24,712sq m vacant.[9]

Structure of the Town Centre

6.2 The polices map for the development plan defines a town centre boundary for Swanley, along with primary and secondary frontages.

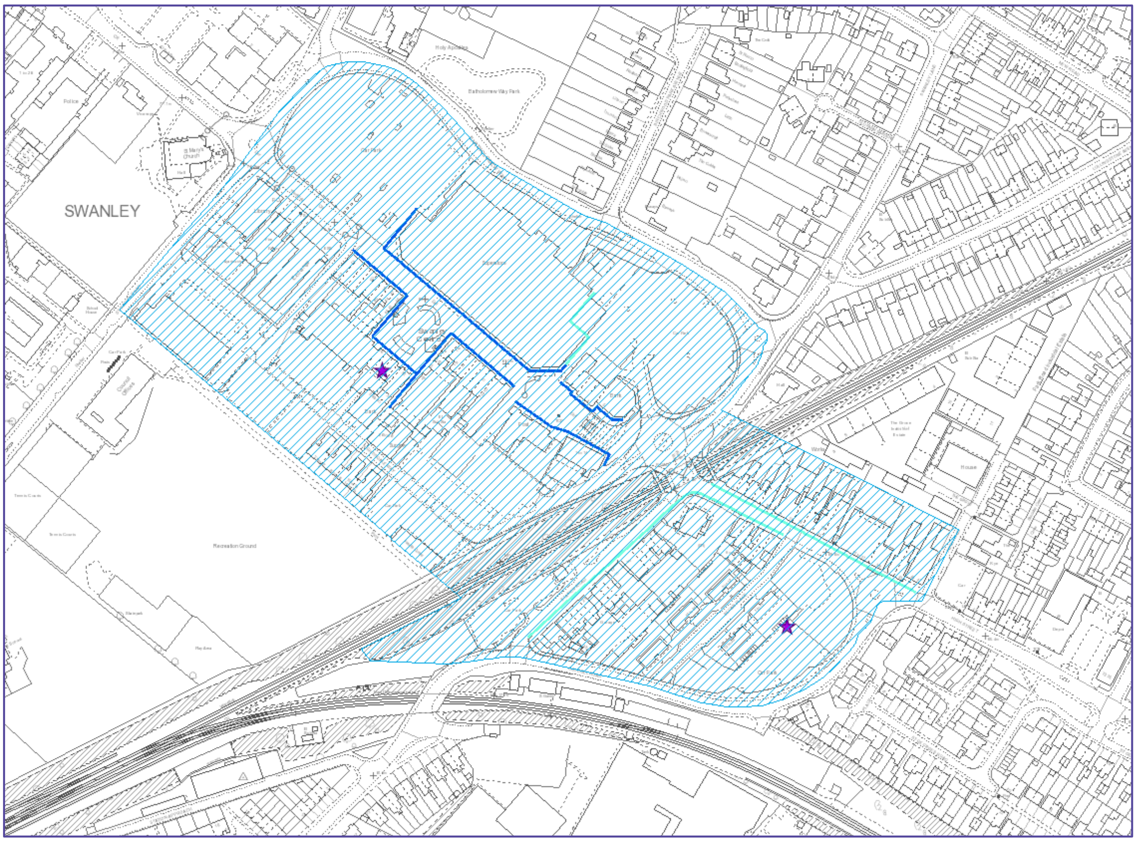
- Town centre boundary. The defined town centre covers land either side of the railway. To the west lies a purpose-built shopping centre bounded by Nightingale Way, Bartholomew Way and St Mary's

[7] the second hybrid planning application, approved at appeal, allowed for circa 300 new residential units and a net increase of circa 3,000sq m of non-residential floorspace, along with a multi-storey car park and remodelled public realm.
[8] of all surveyed units, GOAD Category report classification
[9] based upon ground floorspace survey data

Road. This area includes the large ASDA store and a pedestrianised shopping area, along with surface level parking areas. To the east of the railway line lies an area bounded by Goldsel Road, Station Road and properties along both sides of High Street.

- Primary frontage areas. The defined primary frontages lie in the central part of the Swanley Centre and include the ASDA supermarket and retail/service units opposite.
- Secondary frontage areas. The secondary frontages run along the southern edge of Station Road, all of the northern edge of High Street plus those properties along the southern edge of the western part of High Street. The eastern elevation of the ASDA unit is also defined as secondary frontage.

Figure 6.1: extract from development plan policies for Swanley town centre



6.3 The policies map also provides a series of other designations in and adjacent to the town centre:

- <u>Mixed use allocations</u>. There are two allocation. The first is known as the 'Swanley Town Centre Regeneration Area' and is allocated under Policy H(c). It covers all of the Swanley Centre (apart from the ASDA supermarket) allows for retail, healthcare, community and residential uses. The second allocation is known as United House, Goldsel Road, and is allocated for 185 residential units, 2,000sq m of Class B1 floorspace, plus open space.
- Employment allocations. In addition to the above, there are several employment land use allocations in and around the town centre, including Swanley Town Council offices, the Technology Centre

(London Road), Park Road Industrial Estate, Horizon House, Media House, and Swan Mill (Goldsel Road).

- There is also a residential land use allocation in the eastern part of the town centre adjacent Goldsel Road.

Land Use Profile

6.4 A key element of understanding town centre health is to examine the land use profile of a centre. Land use information was provided in the 2016 retail study and we have expanded upon this analysis in Table 6.1 below to show the land use information available at the time of the 2016 study[10], the most recent (December 2020) survey from Experian GOAD and AY's update performed in November 2021.

6.5 For the avoidance of doubt, the data which has been used conforms to Experian's 'category' report classification of town centres.

Table 6.1: land use composition of Swanley town centre - units

Sector	September 2015			December 2020			November 2021		
	No.	%	Ave (%)	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	7	8.2	8.6	8	9.0	9.2	9	10.0	9.2
Comparison	21	24.4	32.0	20	22.5	27.2	20	22.2	27.2
Retail Service	16	18.6	13.9	16	18.0	15.6	16	17.8	15.6
Other Retail	0	0.0	0.1	0	0.0	0.1	0	0.0	0.1
Leisure Services	28	32.6	23.4	26	29.2	24.5	26	28.9	24.5
Financial & Business Services	12	14.0	10.6	13	14.6	9.2	13	14.4	9.2
Vacant	2	2.3	11.2	6	6.7	14.1	6	6.7	14.1
Total	**86**	**100**	**100**	**89**	**100**	**100**	**90**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification . Figures may not add due to rounding.

6.6 The data contained in Table 6.1 can be summarised as follows:

- between 2015 and 2021 there has been a steady (and small) increase in the number of convenience goods uses in Swanley town centre, from 7 to 9. The proportion of these uses has remained commensurate with the national average throughout this period.

[10] September 2015 Experian GOAD survey of Swanley town centre

- there has also been little change in the other retail and service use categories over the same period. The two key principles to take away from the available data is that the proportion of comparison goods retailers in the centre is below the national average and, in contrast, the proportion of various types of service use is above their respective national average.
- the number of vacant units in the centre increased between 2015 and 2020 and has remained stead since 2020. The actual reasons for the increase in vacancy levels is not known, although the on-going prospect of redevelopment of part of the town centre may have had an influence.

6.7 The same exercise has also been performed for gross floorspace areas in the town centre and this is contained in Table 6.2 below.

Table 6.2: land use composition of Swanley town centre - floorspace

Sector	**September 2015**			**December 2020**			**December 2021**		
	No.	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**
Convenience	117,000	44.0	15.2	117,500	45.7	15.4	117,500	45.7	15.4
Comparison	51,100	19.2	35.9	46,400	18.0	30.9	46,400	18.0	30.9
Retail Service	23,100	8.7	6.7	25,100	9.8	7.2	25,100	9.8	7.2
Other Retail	0	0.0	0.1	0	0.0	0.1	0.0	0.0	0.1
Leisure Services	50,600	19.0	24.4	35,100	13.6	25.6	35,100	13.6	25.6
Financial & Business Services	21,600	8.1	8.0	21,200	8.2	6.9	21,200	8.2	6.9
Vacant	2,600	1.0	9.0	12,000	4.7	13.3	12,000	4.7	13.3
Total	**266,000**	**100**	**100**	**257,300**	**100**	**100**	**257,300**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification. Floorspace figures given in gross ground floorspace, square metres. Figures may not add due to rounding.

6.8 The floorspace data in Table 6.2 above is in general conformity with the trends in relation to the number units in the town centre, although it is notable that the amount of floorspace occupied by convenience goods retailers (45%) is well above the national average (15%) due to the presence of the ASDA and ALDI stores. There has also been a noticeable fall in the amount of floorspace occupied by leisure service uses between 2015 and 2021.

Shopping Patterns

6.9 In order to inform the 2016 retail study a survey of household shopping patterns was undertaken. The results of this survey were summarised for the purposes of the assessments of quantitative and qualitative need, although the results are also useful for the assessment of town centre health.

6.10 A new household survey has been conducted in late 2021 and the results of the two survey are compared below. For the avoidance of doubt, Zone 5 of the 2021 household survey covers the same area as Zone 14 in the 2016 survey.

6.11 The 'headlines' from the 2016 survey are as follows:

- 2016 survey shows that Swanley town centre had a 67% share of first choice main food shopping trips from Zone 5 residents, with the majority (60%) of this total attracted to the ASDA supermarket. The catchment of the town centre for first-choice main food shopping is generally limited to Zone 5, with only small amounts of trade coming from Zones 6, 7 and 8.
- In relation to 'leakage' of main food trips to destinations outside of the town, the main beneficiaries of this were stores in Greenhithe, Sidcup and Sevenoaks.
- 6% of residents of Zone 5 used the internet as their first choice main food shopping destination in 2016. This compares to a study area wide use of the internet for main food shopping of 8%.
- For second choice main food shopping, the 2016 household survey found that the ALDI store grew in popularity (17%) and the ASDA reduced (also 17%), with a greater level of leakage to stores in surrounding settlements (particularly Sidcup).
- In relation to top-up food shopping, Swanley town centre had a 60% share of trips from residents of Zone 5 in 2016, with half of all top-up food shopping trips (33%) flowing to the ASDA store, with 15% to the ALDI store and 12% to the Co-op on High Street.
- In relation to first choice destinations amongst Zone 5 for different types of comparison goods shopping, the 2016 survey provided the following market shares for shopping trips to Swanley town centre:
    - clothing and footwear: 7%[11]
    - furniture, floorcoverings and textiles: 5%[12]
    - DIY: 2%[13]
    - domestic appliances and smaller electrical products: 3%[14]
    - health and beauty: 46%
    - recreational goods: 8%

[11] at the time of the 2016 household, there was a 'leakage' of 66% of clothing/footwear trips from Zone 5 to Bluewater
[12] 45% 'leakage' from Zone 5 to Bluewater and 11% 'leakage' to Lakeside
[13] at the time of the 2016 survey there was significant 'leakage' to surrounding settlements for DIY trips, such as
[14] market share associated with the ASDA store in the town centre

- Beyond the local area, the results of the 2016 survey indicate that the catchment of Swanley town centre is largely confined to Zone 5 of the study area, with small market shares in Zones 4, 7 and 8 for certain types of comparison goods.
- The 2016 household survey also asked specific questions around the usage of Swanley town centre and obtained the following information:
  - 63% of those people indicating that they visited Swanley town centre most often did so at least once a week.
  - the most popular main purpose for the visit was food goods shopping (60%), followed by comparison goods shopping (16%) , leisure activity (6%), visiting family / friends (3%) and visiting the market (2%). Trips associated with food and beverage uses were very low, at 1%.
  - 76% of visits to the town centre travelled by car, followed by 11% walking and 10% using public transport.
  - for those visiting the town centre by car, the most popular parking destinations were: ASDA (73%) and ALDI (8%).

- the 2016 survey also asked about the usage of leisure facilities:
  - cafes: 21%[15]
  - restaurants: 8%[16]
  - pubs/clubs: 11%
  - health and fitness: 52%[17]
  - the lack of a cinema in Swanley means that all trips from the local area (Zone 5) ‘leak’ to surrounding settlements, including: Greenhithe (74%) and Bexleyheath (6%).

6.12 The 2021 household survey included similar questions to the 2016 survey, proving the following results:

- The 2021 survey shows that Swanley town centre had a 75% share of first choice main food shopping trips from Zone 5 residents, with the majority (56%) of this total attracted to the ASDA supermarket and the remaining 19% flowing to ALDI.
- In relation to second choice main food shopping destinations, the town centre had a lower market share at 48% amongst Zone 5 residents, with the ALDI store being most popular (28%), followed by ASDA (19%) and Iceland (1%).
- in relation to top-up food shopping trips, the 2021 household survey gathered data on first and second choice trips. As a first choice destination, Swanley town centre attracts a market share of 72% amongst Zone 5 residents, which is split between ASDA (31%), ALDI (27%), Co-op on High Street

[15] 8% of local residents travel to Dartford, 8% to Sevenoaks, and 16% to Bluewater
[16] 23% of local residents travel to Bluewater and 3% to Sevenoaks
[17] 21% of local residents travel to Dartford and 10% to Bexleyheath

(8%), Iceland (2%) and other smaller stores in the centre (3%). For second choice top-up food trips, the town centre has an overall 70% market share amongst Zone 5 residents, split between ALDI (8%), ASDA (21%), Co-op (22%), Iceland (2%) and smaller stores in the town centre (16%).

- The 2021 survey repeated the earlier question about grocery shopping via the internet from the 2016 survey and found that 8% of Zone 5 residents surveyed used the internet as their first choice main food shopping destination. This can be compared with an overall market share of 21% across the whole of the study area, indicating that local Swanley residents are more likely to shop at a 'physical' stores than residents of the wider area.
- for comparison goods shopping, the 2021 household survey provides the following market share data (excluding shopping via the internet[18]) for first choice trips associated with Zone 5 residents is as follows:
  - clothing and footwear: 8%19
  - furniture, floorcoverings and household textiles: 11%20
  - DIY goods: 13%
  - domestic appliances: 33%21
  - smaller electrical goods: 7%22
  - health and beauty goods: 58%23
  - recreational goods: 12%24
- in relation to shopping via the internet, a comparison between the 2016 and 2021 surveys is performed later in this section, although the market share of first choice trips amongst Zone 5 residents is as follows:
  - 27% clothing and footwear
  - 31% furniture, floorcoverings, household textiles
  - 51% domestic appliances
  - 44% smaller electrical goods
  - 10% health and beauty
  - 49% recreational goods
  - for those categories listed above, it is notable that the share of internet shopping amongst Zone 5 residents is generally lower than the average across the whole of the study area.

[18] and 'don't do' responses
[19] all associated with the town centre ASDA supermarket
[20] notable levels of 'leakage' include Greenhithe, Dartford, Lakeside and Sidcup
[21] 4% market share as a second-choice destination for these types of goods
[22] 13% market share as a second-choice destination for these types of goods
[23] 67% share as a second choice destination
[24] 15% as a second choice shopping destination

Whilst Swanley itself does not a large level of comparison goods provision, one reason may be the wide variety of provision in the surrounding area, particularly Bluewater.

— the 2021 household survey also gathered data on the usage of the internet before and after the lockdowns associated with COVID-19. The results show that 73% were not intended to change their level of usage, with 16% shopping more often and 5% shopping less often. This mirrors the average trend across the rest of the survey area.

- in order to provide an indication of the usage of Swanley town centre, the 2021 household survey seeks to replicate some of the earlier questions from the 2016 survey (plus a number of additions). The results of the 2021 survey indicate that, amongst Zone 5 residents:
  - — 80% of local residents visit Swanley town centre at least once a week for any purpose. The most popular reasons given for visiting the centre are broad, including non-food shopping (62%), main food shopping (73%), top-up food shopping (54%), chemist/pharmacy (14%), café/restaurant uses (19%), walk/stroll around (11%), the market (21%), health care (23%), meeting family/friends (21%), visiting the market (13%) and visiting the post office (15%).
  - — in relation to mode of travel to the centre, 67% travelled by car and 30% walked to the centre.
- Finally, respondents to the 2021 household survey will also asked about this usage of leisure facilities. Amongst Zone 5 residents, 28% visited Swanley town centre for cafes and restaurants, with 30% visiting the centre for pubs/clubs. 51% visited the town centre for health/fitness purposes.

6.13 Based upon the above data, the following comparisons and observations can be made:

- there has been a modest shift in how the town centre is used for food shopping, with the 2021 household survey showing an increased market share for main food shopping trips, alongside a decreasing market share for top-up food shopping trips. The only change in foodstore provision in the centre of Swanley over the past five years has been the introduction of the Iceland store, although the 2021 survey data suggests that this store has not had a significant impact upon shopping patterns.
- when the influence of internet shopping is stripped out of the data, a comparison between the 2016 and 2021 survey data suggests that there has not been a significant shift in non-food market shares associated with Swanley town centre. Generally, the centre has a low market share across a number of goods categories which is influenced significantly by the 'leakage' of expenditure to surrounding settlements and Bluewater.
- the 2016 and 2021 survey data indicates that the frequency of trips to Swanley from local residents (Zone 5) has increased over the past five years, with both food and non-food recording higher levels of visitation (particularly non-food). There has also been an increase in the market share of the town centre for food and beverage uses.

Usage of the Town Centre

6.14 In addition to the results of the new household survey, the 2021 in-street survey provides additional data on the usage of Swanley town centre and can contribute to the overall assessment of town centre health. The survey results reveal the following:

- with regards the main purpose of visits to Swanley town centre, the 2021 in-street survey indicates that the most popular reason is food shopping (30%), followed by non-food shopping (14%), the market (14%) and work/business (10%). Only 3% of those surveyed in the town centre indicated that the main purposes of their trip was to visit a food/beverage outlet, whilst 5% indicated that they were there for service use.
- in relation to secondary reasons for visiting the town centre, the same categories feature, although there is an even split between food and non-food shopping (both 13%), with socialising being the most popular secondary reason at 14%. 35% of survey respondents indicated that there was no secondary purpose to their visit to Swanley town centre.
- survey respondents were asked to provide an indication of the average amount of money spent per visit on different types of goods and services, with the following data on the gathered:
  - food/groceries: £16.7[25]
  - health / beauty: £1.4[26]
  - other non-food items: £6.5
  - food / drink at cafes / restaurants: £3.2[27]
- 53% of survey respondents travelled to the centre by car, with 30% walking and 13% using public transport (bus/train).
- 64% of survey respondents travelled up to 15 minutes to get to the centre.
- the average amount of time spent in the town centre is circa 112 minutes, with 26% of survey respondents spending up to one hour in the centre.
- in relation to the types of shops and services visited by survey respondents, the most popular were: foodstores (68%), restaurants/cafes (12%), household goods shops (12%), the market (9%), and chemists (9%).
- the popular specific shops and services visited are: ASDA (65%), ALDI, (8%), Poundland (17%), Costa (15%), Iceland (7%), Savers (8%) and Wilko (18%).
- 63% of survey respondents indicated that they visited food shops in the town centre at least once a week, with 48% visiting non-food shops at least once a week. For those people visiting food shops, 44% indicated that the also visit other shops and services on the same visit. The most popular linkages associated with food shopping were with charity shops (13%), chemists (9%), other food stores (22%), household goods shops (46%), the market (27%) and restaurants/cafes (22%).

[25] 43% of survey respondents spent up to £50 on their trip
[26] 15% of survey respondents spent between £0-£50 on health/beauty goods. 65% did not spend anything.
[27] 68% of survey respondents did not spend anything at food/beverage outlets. 18% spent between £0-£20 during their visit.

- A similar set of questions was asked in relation to non-food shopping, with 37% of respondents linking with other shops and services. Of this group, 78% made a linkage with foodstores.
- Of those people surveyed, 74% indicated that they visited Swanley at least once a week during the daytime, with only 5% visiting at least once a week during the evening. 71% of in-street survey respondents do not visit the town centre in the evenings.
- Finally, in-street survey respondents were asked about their use of Swanley town centre as a consequence of the effects of the COVID-19 pandemic. 64% indicated that there would be no change the amount they visited the centre, with 33% visiting more often, with only 3% visiting less often. This intended increase in usage is the highest of the five town centres surveyed.

6.15 When compared with the results of the 2016 in-street survey, the following is considered to be relevant:

- wider set of 'main purposes' for visiting Swanley town centre. Food shopping remains the most popular, followed by non-food shopping, although the market, work/business, healthcare uses also now feature.
- no material change in the most popular stores: ASDA, ALDI, Wilko and Poundland.
- it remains the case that car, followed by walking, are the most popular modes of travel, although public transport has increased in popularity. The percentage of survey respondents using a car to visit the centre has decreased, whilst walking has increased. Average length of stay in Swanley town centre has also increased from 96 minutes to 111 minutes.
- journey times to the centre have increased, on average from 10.7 minutes to 13.8 minutes, with may be explained by the increasing use of public transport.
- as a general trend, the amount of money spent, on average, on non-food goods in Swanley is low and has been decreasing. This is likely to be due to a number of factors, including: (A) the continue rise of the internet in terms of its share of overall spend; (B) the influence of surrounding settlements and facilities (including Bluewater); and (C) the general lack of non-food stores in the centre.

Conclusions

6.16 The foregoing data and analysis enables the following observations to be made in relation to Swanley town centre:

- as previously observed in the 2016 retail study, the town centre is dominated by foodstores, particularly ASDA, with almost half of all surveyed ground floor floorspace occupied by these uses (with the proportion of floorspace occupied by convenience uses well above the national average). This unsurprising leads to a situation where food shopping is the main reason for visiting the town centre.
- The new 2021 household survey data (when compared with the 2016 survey data) indicates a slight shift in how the centre is used for food shopping: with an increase in main food shopping trips, alongside a decrease in top-up shopping trips. Our quantitative assessment shows that, collectively,

almost all convenience goods expenditure attracted to Swanley flows to the town centre, with a high market share of the centre for both main and top-up food shopping.

- the town centre continues to have a lower than average proportion of comparison goods retailers and a much higher proportion (than national average) of service uses. The function of the centre as a comparison goods shopping destination is likely to be influenced by a number of factors, including: the size of centre, surrounding provision (including Bluewater) and the on-going influence of the internet (which is affecting all centres to one extent or another).
- However, there are a number of positive factors to report around the usage of Swanley town centre, including: the widening of reasons for visiting the centre, an increase in the average length of stay in the centre, the increased use of public transport to travel to the centre, and also the increasing frequency of trips to the centre.

7. Edenbridge – Town Centre Indicators

Summary of Conclusions from 2016 Retail Study

7.1 The 2016 retail study made the following observations regarding some of the key health indicators for Edenbridge town centre:

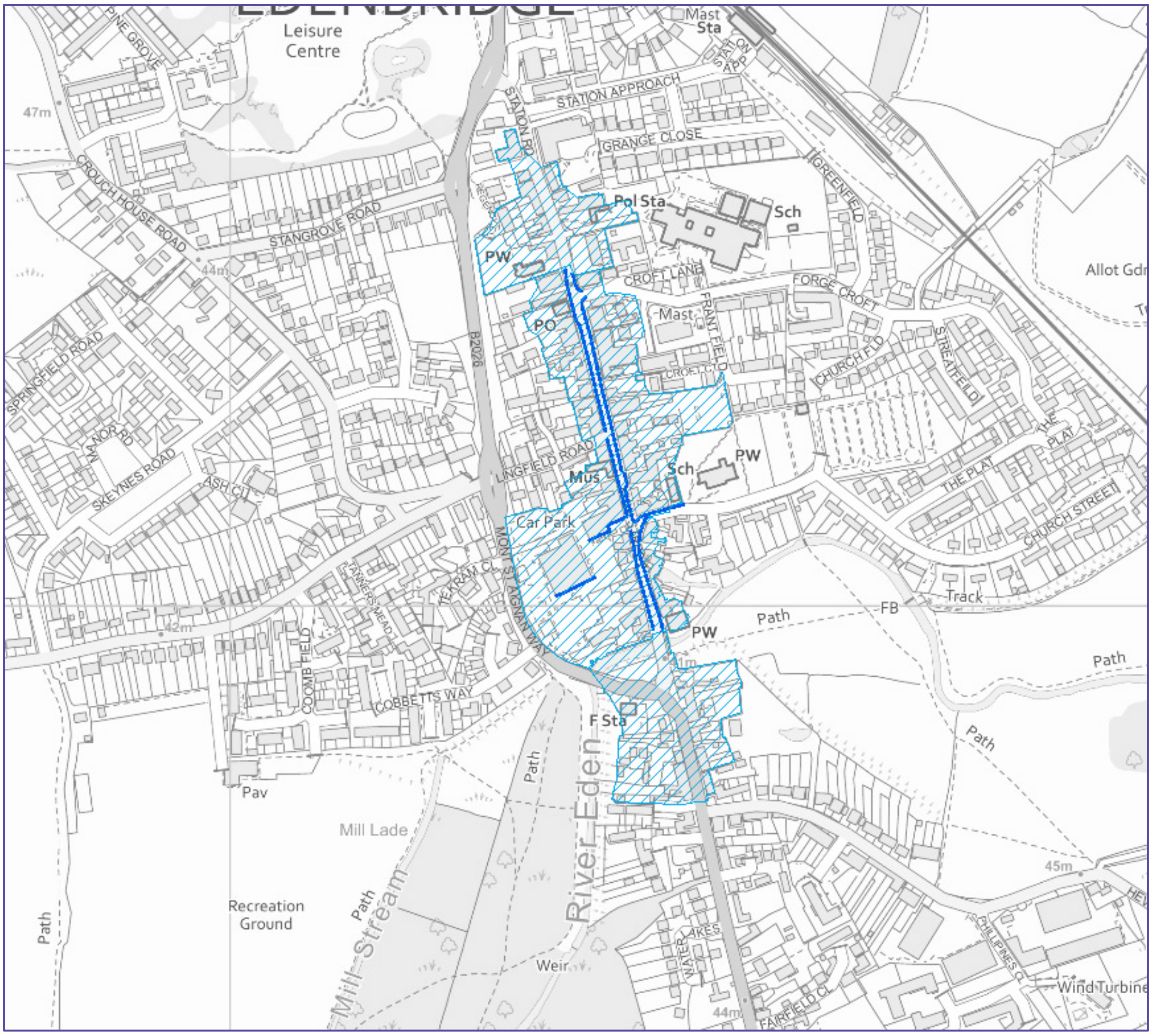
- Edenbridge has a good range of services for the size of the settlement. Whilst it would appear that a number of banks have closed in recent years, the centre has retained a Lloyds Bank branch. There are a number of public houses, a post office and some charity shops located within the centre. There are a number of antiques shops, particularly located around Church Street which help to provide a more distinct, specialist retail offer. The centre is lacking in its range of comparison goods offer but this reflects the relatively small size of the centre.
- In terms of convenience goods, there is a Tesco Express (412sq m net) located off High Street, and a medium sized Waitrose (1,151sq m net) 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.
- The most recent Experian GOAD survey of Edenbridge town centre available at the time of the 2016 retail study found that the vacancy rate in the town centre was 14.6%, above the national average of 11.2%. Positively it would appear that subsequent a number of units identified as vacant at the time of the Experian GOAD survey have since been filled where existing businesses have expanded into adjacent vacant units.

Structure of the Town Centre

7.2 The polices map for the development plan, an extract of which is contained in Figure 7.1 below, defines a town centre boundary for Edenbridge, along with a series of primary frontages:

- Town Centre. The defined town centre boundary is linear in nature and runs from north to south along High Street, from the junction with Halland Court in the north with the junction with Hever Road in the south. The defined boundary includes properties on both sides of High Street, with the majority within a Conservation Area.
- Primary Frontages. The defined frontages lie in the central part of High Street on both sides of the highway, from St Lawrence Church to the River Eden (including the Waitrose store).

Figure 7.1: extract from development plan policies map for Edenbridge town centre



7.3 The policies map also identifies a mixed use redevelopment allocation at Station Approach (on the north-eastern edge of the town centre), from the Allocations and Development Management Plan, for 20 residential units, plus 0.5 hectares of employment land uses.

7.4 Edenbridge, like Swanley and Sevenoaks, has its own town centre related policy in the Allocations and Development Management Plan, which notes 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 non- A1 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".

7.5 There are no allocations for retail or leisure land use development within or on the edge of the defined town centre boundary in Edenbridge.

Land Use Profile

7.6 A key element of understanding town centre health is to examine the land use profile of a centre. Land use information was provided in the 2016 retail study and we have expanded upon this analysis in Table 7.1 below to show the land use information available at the time of the 2016 study, the most recent (November 2019) survey from Experian GOAD and AY's update (performed in December 2021).

7.7 For the avoidance of doubt, the data which has been used conforms to Experian's 'category' report classification of town centres.

Table 7.1: land use composition of Edenbridge town centre - units

Sector	December 2013			November 2019			November 2021		
	No.	%	Ave (%)	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	8	9.0	8.6	8	8.8	9.2	8	8.7	9.2
Comparison	24	27.0	32.0	19	20.9	27.2	23	25.0	27.2
Retail Service	16	18.0	13.9	19	20.9	15.6	19	20.7	15.6
Other Retail	1	1.1	0.1	0	0	0.1	0	0.0	0.1
Leisure Services	18	20.2	23.6	22	24.2	24.5	20	21.7	24.5
Financial & Business Services	9	10.1	10.6	8	8.8	9.2	8	8.7	9.2
Vacant	13	14.6	11.2	15	16.5	14.1	14	15.2	14.1
Total	**89**	**100**	**100**	**91**	**100**	**100**	**92**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification . Figures may not add due to rounding.

7.8 The land use data in Table 1 above provides the following information:

- between 2013 and 2021 there has been no change in the number of convenience goods retailers in Edenbridge town centre. The proportion of such retailers remains very similar to the national average.
- there has been a small change in the number of comparison goods retailers in the centre between 2013 and 2021, including a decrease over the period 2013-2020 and an increase of four units over the past year. This recent increase leaves the proportion of comparison goods retailers occupying one quarter of all surveyed units in the centre and which is slightly below the national average of 27%.

- retail and leisure service uses have increased between 2013 and 2021, with the proportion of the former five percentage points above the national average. Financial service uses have decreased slightly, but remain close to the national average.
- vacant units in the town centre have increased by one between 2013 and 2021, with a decrease of one unit between 2020 and 2021. Over the period 2013-2021 the proportion of vacant units in the centre has remained slightly above the national average.

7.9 The same exercise has also been performed for gross floorspace areas in the town centre and this is contained in Table 7.2 below.

Table 7.2: land use composition of Edenbridge town centre - floorspace

Sector	December 2013			November 2019			December 2021		
	No.	%	Ave (%)	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	32,100	26.7	15.2	24,100	20.2	15.4	24,100	20.1	15.4
Comparison	27,800	23.1	35.9	22,000	18.4	30.9	26,300	21.9	30.9
Retail Service	11,600	9.6	6.7	20,100	16.8	7.2	19,600	16.3	7.2
Other Retail	500	0.4	0.1	0	0.0	0.1	0.0	0.0	0.1
Leisure Services	24,500	20.6	24.4	28,800	24.1	25.6	24,400	20.4	25.6
Financial & Business Services	8,800	7.3	8.0	6,700	5.6	6.9	6,700	5.6	6.9
Vacant	15,100	12.5	9.0	17,700	14.8	13.3	18,800	15.7	13.3
Total	**120,400**	**100**	**100**	**119,400**	**100**	**100**	**119,900**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification. Floorspace figures given in gross ground floorspace, square metres. Figures may not add due to rounding.

7.10 The floorspace data in Table 7.2 provides the following information:

- whilst the number of units in convenience goods use has remained the same, the amount of floorspace within this category has fallen by circa 8,000sq ft. The proportion of floorspace in this category remains above the national average, although the difference between the two has halved between 2013 and 2019.
- in line with the drop in the number of units, there has also been a drop in the amount of comparison goods floorspace occupied by comparison goods retailers. The proportion (22%) is well below the national average of 31%.
- The data in Table 2 above shows that, on a collective basis, the proportion of floorspace occupied by all service uses is above the national average, with the most notable difference being in relation to retail service uses, which has grown significantly between 2013 and 2019.
- In line with the slight growth in the number of vacant units, there has been corresponding growth in the amount of vacant floorspace (which is also slightly above the national average, by 2.4 percentage points).

Shopping Patterns

7.11 In order to inform the 2016 retail study a survey of household shopping patterns was undertaken. The results of this survey were summarised for the purposes of the assessments of quantitative and qualitative need, although the results are also useful for the assessment of town centre health. A new household survey has been conducted in late 2021 and the results of the two survey are compared below. As noted elsewhere in this study, the two surveys use slightly different levels of geography and therefore the results of the 2016 survey have been re-based in order to match the content of the 2021 survey.

7.12 The 'headlines' from the 2016 survey are as follows:

- Edenbridge lies in Zone 3 of the survey area[28]. 2016 survey shows that Edenbridge town centre had a 49% share of first choice main food shopping trips from Zone 3 residents, with the majority (47%) of this total attracted to the Waitrose supermarket. In relation to second choice main food shopping destinations, the town centre had a reasonably similar market share at 49% from Zone 3 residents, with a 32% market share for Waitrose and 17% for the Tesco Express store.
- At the time of the 2016 survey, the Waitrose and Tesco Express stores in Edenbridge town centre were the two main grocery stores in the town and therefore this led to a reasonably significant amount of 'leakage' of main food trips to destinations outside of the town. The main beneficiaries of this 'leakage' were stores in Sevenoaks and Oxted.
- 8% of residents of Zone 3 used the internet as their first choice main food shopping destination in 2016.
- In relation to top-up food shopping, Sevenoaks has a 85% share of trips from residents of Zone 3, with two thirds of all top-up food shopping trips (69%) flowing to the Waitrose store and 17% to the Tesco Express store.
- In relation to first choice destinations amongst Zone 3 for different types of comparison goods shopping, the 2016 survey provided the following market shares for shopping trips to Edenbridge town centre:
  - clothing and footwear: 3%
  - furniture, floorcoverings and textiles: 1%
  - DIY: 10%
  - domestic appliances: 72%
  - smaller electrical products: 48%
  - health and beauty: 68%
  - recreational goods: 24%

[28] the geographical extent of this survey zone has not changed between the 2016 and 2021 household surveys.

- Beyond the local area, the results of the 2016 survey indicates that the catchment of Edenbridge is largely confined to Zone 3 of the study area (the exception being small market shares in Zones 2 and 8 electrical goods)
- The 2016 household survey also asked specific questions around the usage of Edenbridge town centre and obtained the following information:
  - 62% of those people indicating that they visited Edenbridge town centre most often did so at least once a week.
  - the most popular main purpose for the visit was food goods shopping (39%), followed by comparison goods shopping (23%) and then visiting family / friends (15%). Trips associated with food and beverage uses were very low, at 2%.
  - for those people who visited Edenbridge town centre and used it for food shopping (as the primary purpose), data was gathered on whether there were any linked trips with other uses. The survey found that 43% of food shoppers did not link with another purposes, although of the ones that did, 19% visited other foodstores, 10% performed a leisure activity and 19% did comparison goods shopping. 14% of food shoppers also visited financial services in the centre, whilst 16% visited a health care use.
  - 81% of visits to the town centre travelled by car, followed by 12% walking and 3% using public transport.
  - for those visiting the town centre by car, the most popular parking destinations were: Waitrose (51%), on-street spaces (12%), the leisure centre (4%) and Market Yard car park (5%).

- the 2016 survey also asked about the usage of leisure facilities, with Edenbridge town centre gaining the following market shares amongst Zones 3 residents:
  - cafes: 35%[29]
  - restaurants: 32%[30]
  - pubs/clubs: 43%
  - health and fitness: 70%[31]
  - the lack of a cinema in Edenbridge means that all trips from the local area (Zone 3) 'leak' to surrounding settlements, including: Oxted (34%), Royal Tunbridge Wells (46%) and East Grinstead (6%).

7.13 The 2021 household survey included similar questions to the 2016 survey, proving the following results:

[29] 8% of local residents travel to East Grinstead, 9% to Oxted, 14% to Sevenoaks and 12% to Royal Tunbridge Wells
[30] 13% of local residents travel to Oxted, 11% to Sevenoaks, 13% to Royal Tunbridge Wells and 3% to Westerham
[31] 8% of local residents travel to East Grinstead

- The 2021 survey shows that Edenbridge town centre had a 53% share of first choice main food shopping trips from Zone 3 residents, with the majority (50%) of this total attracted to the Waitrose supermarket. In relation to second choice main food shopping destinations, the town centre had a higher market share at 63% from Zone 3 residents, with a reasonably equal split between the Waitrose and Tesco Express stores (30%-31%).
- Beyond the town centre, the 2021 survey indicated that the Lidl store located to the north of the town centre in Edenbridge has a 26% share of first choice main food trips and a 20% share of second choice main food trips. These figures indicate that, when taken as a whole, Edenbridge was able to retain between three-quarters and four-fifths of main food shopping trips. It is notable that the opening of the Lidl store has not had a material reduction in the (first choice) main food shopping market share amongst Zone 3 residents of the study area and has, instead, led to a claw-back in trips which were previously being lost to surrounding settlements.
- in relation to top-up food shopping trips, the 2021 household survey gathered data on first and second choice trips. As a first choice destination, Edenbridge town centre attracts a market share of 70% amongst Zone 3 residents, which is split relatively equally between the Tesco Express (26%), Waitrose (20%) and other smaller stores in the centre (24%). For second choice top-up food trips, the town centre has an overall 68% market share amongst Zone 3 residents, split between smaller stores (42%), Waitrose (16%) and Tesco Express (10%).
- The 2021 survey repeated the earlier question about grocery shopping via the internet from the 2016 survey and found that 13% of Zone 3 residents surveyed used the internet as their first choice main food shopping destination. This can be compared with an overall market share of 20.5% across the whole of the study area, indicating that local Edenbridge residents are more likely to shop at a ‘physical’ store than residents of the surrounding area.
- for comparison goods shopping, the 2021 household survey provides the following market share data (excluding shopping via the internet[32]) for first choice trips associated with Zone 3 residents is as follows:
  - clothing and footwear: 3%
  - furniture, floorcoverings and household textiles: 7%
  - DIY goods: 43%[33]
  - domestic appliances: 73%[34]
  - smaller electrical goods: 48%[35]
  - health and beauty goods: 77%[36]
  - recreational goods: 45%

[32] and ‘don’t do’ responses
[33] 21% market share as a second-choice destination for DIY and hardware goods
[34] 66% market share as a second-choice destination for these types of goods
[35] 13% market share as a second-choice destination for these types of goods
[36] 37% share as a second choice destination

  — in relation to the 'leakage' of comparison goods shopping trips made by residents of Zone 3, the level and distribution of 'leakage' depends upon the type of goods, although Royal Tunbridge Wells, Sevenoaks, Crawley and East Grinstead.

- in relation to shopping via the internet, a comparison between the 2016 and 2021 surveys is performed later in this section, although the market share of first choice trips amongst Zone 3 residents is as follows:
  - — 48% clothing and footwear
  - — 53% furniture, floorcoverings, household textiles
  - — 51% domestic appliances
  - — 53% smaller electrical goods
  - — 18% health and beauty
  - — 25% recreational goods
  - — for those categories listed above, it is notable that the share of internet shopping amongst Zone 3 residents is higher than the average across the whole of the study area. One reason for this may be the limited range of comparison goods stores in Edenbridge, coupled with: (A) the general increase in usage of the internet; and (B) the distance required to be travelled to surrounding settlements.
  - — the 2021 household survey also gathered data on the usage of the internet before and after the lockdowns associated with COVID-19. In a departure from the general trend across the study area, observed by the 2021 survey, residents of Zone 3 (Edenbridge) indicated that they would use the internet less often when compared with levels of usage before the imposition of restrictions.

- in order to provide an indication of the usage of Edenbridge town centre, the 2021 household survey seeks to replicate some of the earlier questions from the 2016 survey (plus a number of additions). The results of the 2021 survey indicate that, amongst Zone 3 residents:
  - — 87% of local residents visit Edenbridge town centre at least once for any purpose. The most popular reasons given for visiting the centre are broad, including non-food shopping (55%), main food shopping (62%), top-up food shopping (58%), chemist/pharmacy (48%), food/beverage uses (30%), walk/stroll around (19%), the market (21%), health care (16%) and visiting the post office (12%).
  - — in relation to mode of travel to the centre, 47% travelled by car and 44% walked to the centre[37].

[37] this is noticeably higher than the study area average of 30%)

- Finally, respondents to the 2021 household survey will also asked about this usage of leisure facilities. Amongst Zone 3 residents, 66% visited Edenbridge town centre for cafes and restaurants, with 61% visiting the centre for pubs/clubs. 51% visited the town centre for health/fitness purposes.

7.14 Based upon the above data, the following comparisons and observations can be made:

- in relation to food shopping, the only significant change in provision between the 2016 and 2021 household surveys has been the opening of a Lidl store outside of the town centre. The opening of this store has two notably effects upon local (Zone 3) food shopping patterns: (A) the Lidl store does not appear to have had a material impact upon the main food shopping market share of Edenbridge town centre and, instead, it has managed to claw back main food shopping expenditure which was previously lost to surrounding settlements; and (B) the new Lidl store has had a small negative impact upon the town centre's top-up food market share.
- Whilst it is a general and widespread trend across the country for comparison goods shopping via the internet to have increase over recent years, it is notable that residents living in the Edenbridge area have a higher propensity to use the internet than the average across the wider study area.
- It remains the case that Edenbridge has a reasonable market share for certain types of comparison goods, including health/beauty, recreation and electrical goods, and there has been a small increase in the town centre's market share across these categories. However, across other categories, particularly clothing/footwear, the town's market share remains very low, with significant leakage to surrounding larger higher-order settlements.
- General frequency of visits to the town centre (i.e. visit at least once a week) has increased between 2016 and 2021 and it remains the case that food shopping is the main reason for visiting the centre. There has also been a noticeable increase in the use of the town centre for food/beverage purposes between 2016 and 2021.

Usage of the Town Centre

7.15 In addition to the results of the new household survey, the new (2021) in-street survey provides additional information on the usage of Edenbridge town centre and can be compared with the results of the 2016 in-street survey.

7.16 The results of the 2021 in-street survey provide the following information:

- with regards the main purpose of visits to Edenbridge town centre, the 2021 in-street survey indicates that the most popular reason is food shopping (44%), followed by non-food shopping (25%). Only 4% of those surveyed in the town centre indicated that the main purposes of their trip was to visit a food/beverage outlet, whilst 7% indicated that they were there for service use.

- in relation to secondary reasons, there was no significant difference, with food shopping being most popular (19%), followed by non-food shopping (9%), eating/drinking (7%), window shopping (12%), leisure uses (4%), socialising (7%), and the market (4%). 27% of survey respondents indicated that there was no secondary purpose to their visit to Edenbridge town centre.
- survey respondents were asked to provide an indication of the average amount of money spent per visit on different types of goods and services, with the following data on the gathered:
  - food/groceries: £28[38]
  - clothing: £2.0[39]
  - health / beauty: £2.0[40]
  - other non-food items: £5.9
  - food / drink at cafes / restaurants: £1.4[41]
  - services: £2.6
- 80% of survey respondents travelled to the centre by car, with 20% walking.
- 95% of survey respondents travelled up to 15 minutes to get to the centre.
- the average amount of time spent in the town centre is circa 65 minutes, with 50% of survey respondents spending up to one hour in the centre.
- in relation to the types of shops and services visited by survey respondents, the most popular were: foodstores (54%), restaurants/cafes (8%), general stores/newsagents (7%), household goods shops (12%), charity shops (7%), and chemists (11%).
- 75% of survey respondents indicated that they visited food shops in the town centre at least once a week, with 25% of this group indicating that the also visit other shops and services on the same visit. The most popular linkages associated with food shopping were with bakers (6%), charity shops (12%), chemists (18%), other food stores (30%), household goods shops (9%) and restaurants/cafes (15%).
- A similar set of questions was asked in relation to non-food shopping. 20% of survey respondents visited the town centre at least once a week for these uses, with 18% of this group linking their trip with other uses.
- Of those people surveyed, 72% indicated that they visited Edenbridge at least once a week during the daytime, with 13% visiting at least once a week during the evening. 53% of in-street survey respondents do not visit the town centre in the evenings.

[38] 88% of survey respondents spent up to £50 on their trip
[39] only 8% of survey respondents spent any money on clothing/footwear on their trip. Over 80% spent nothing on clothing/footwear on their trip.
[40] 16% of survey respondents spent between £0-£50 on health/beauty goods. 65% did not spend anything.
[41] 73% of survey respondents did not spend anything at food/beverage outlets. 12% spent between £0-£20 during their visit.

- Finally, in-street survey respondents were asked about their use of Edenbridge town centre as a consequence of the effects of the COVID-19 pandemic. 71% indicated that there would be no change the amount they visited the centre, with 15% visiting more often and 9% visiting less often.

7.17 When compared with the results of the 2016 in-street survey, the following is considered to be relevant:

- It remains the case that food shopping is the main reason for visiting Edenbridge town centre, well above the level for non-food shopping.
- It is interesting to note that the level of popularity of the Waitrose foodstore has materially declined, with around half the level of responses in 2021. This is also the case for Boots and the Post Office, whilst the Tesco Express store has noticeably grown in popularity. The recently opened Home Bargains store, whilst not located in the town centre is also mentioned in the 2021 in-street survey.
- there has been little change in the split between mode of travel to the town centre, with the car remaining most popular (followed by walking trips), although there has been a shift towards greater car usage. The average time taken on a trip to town centre has reduced from circa 11 minutes to circa 7 minutes. There has also been a shortening of the amount of time survey respondents spend, on average, in the centre, from 78 minutes to 66 minutes.

Conclusions

7.18 Based upon the foregoing analysis, the following conclusions can be drawn in relation to the key aspects of Edenbridge town centre:

- of particular note is that the proportion of vacant units in the centre has remained slightly above the national average. All centres have vacant units, although this should be an area for focus and consideration in terms of the size of the town centre for retail and service uses.
- the proportion of convenience retail units in the centre remains in line with the national average, but there has been a noticeable fall in the amount/proportion of floorspace occupied by these uses.
- it remains the case that Edenbridge has a significant service function in terms of units and floorspace.
- in relation to convenience goods market share levels, it is notable that the new Lidl store, located outside of the town centre, hasn’t let to a material change (i.e. decrease) in the town centre’s convenience goods market share, although it would appear that the Waitrose is becoming a comparatively less popular destination. Nevertheless food shopping remains the most popular reason for visiting the town centre. Rather than taking significant levels of market share away from the town centre, it would appear that the new Lidl store has been able to claw-back convenience goods shopping trips previously lost to surrounding settlements.
- The arrival of the Lidl store has split the destination of convenience goods expenditure within the town. Overall, the town attracts a total of £46m of convenience goods expenditure, with £28m of this amount flowing to the town centre

- almost all of the comparison goods expenditure attracted to Edenbridge flows to the town centre, which has a total study area derived turnover £17.5m (with majority being derived from non-bulky goods shopping for health/beauty and recreation goods). This level of comparison goods turnover places Edenbridge third, behind Sevenoaks and Swanley (with 18% of the turnover of Sevenoaks town centre).

8. Westerham – Health Check Indicators

Summary of Conclusions from 2016 Retail Study

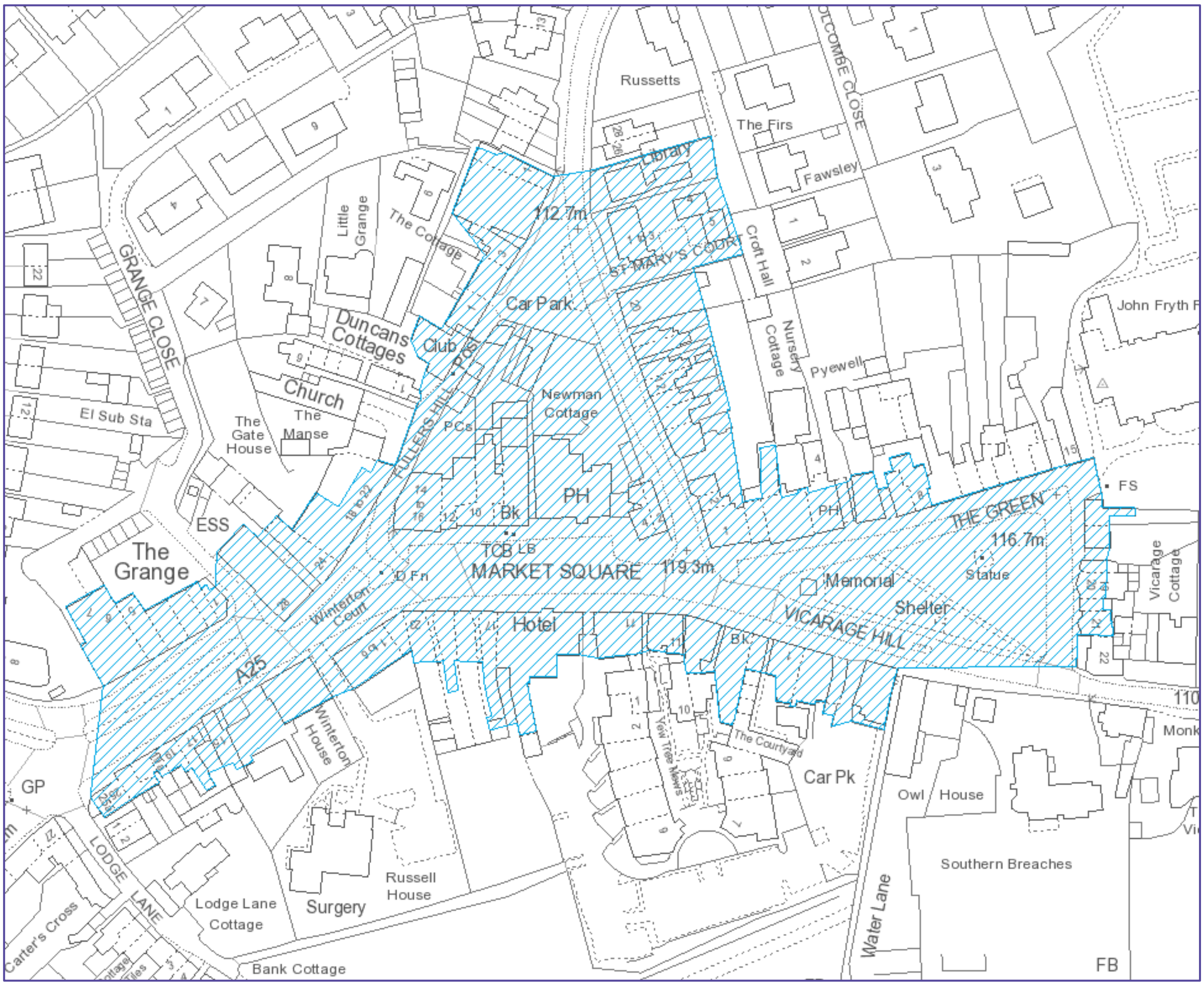
8.1 The 2016 retail study provided the following observations regarding Westerham centre:

- Westerham is identified as being a Local Service Centre in the Sevenoaks Core Strategy. Its convenience goods offer comprises a 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, helping create a relatively unique character.
- In terms of the food and beverage offer, 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, with the in-centre survey indicating that 28.0% of respondents had visited a café/restaurant.
- The latest Experian GOAD land use survey at the time of the 2016 retail survey was dated September 2014 and indicated that the vacancy rate in the centre was 2.8%, well below the national average (at that time) of 11.2%.

Structure of the Town Centre

8.2 The polices map for the development plan defines a town centre boundary for Westerham, which is shown in Figure 8.1 below.

Figure 8.1: extract from development plan policies map for Westerham centre



8.3 The defined town centre boundary, as shown in Figure 1 above, includes properties around Market Square, The Green, High Street, Vicarage Hill, London Road and Fullers Hill.

8.4 There are no site / land use allocations in or around the town centre boundary.

Land Use Profile

8.5 Table 8.1 below provides data on the land use profile of Westerham, using data available at the time of the 2016 retail study (September 2014), the latest available Experian GOAD survey (December 2020), along with Avison Young's update in November 2021.

Table 8.1: land use composition of Westerham town centre - units

Sector	September 2014			December 2020			November 2021		
	No.	%	Ave (%)	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	5	6.9	8.6	7	10.3	9.2	7	10.3	9.2

Sector	**September 2014**			**December 2020**			**November 2021**		
Comparison	28	39.0	32.0	20	29.4	27.2	21	29.4	27.2
Retail Service	12	16.7	13.9	11	16.2	15.6	11	16.2	15.6
Other Retail	0	0.0	0.1	0	0.0	0.1	0	0.0	0.1
Leisure Services	17	23.6	23.6	21	30.9	24.5	20	30.9	24.5
Financial & Business Services	8	11.1	10.6	8	11.8	9.2	8	9.2	9.2
Vacant	2	2.8	11.2	1	1.5	14.1	1	1.5	14.1
Total	**72**	**100**	**100**	**68**	**100**	**100**	**68**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification . Figures may not add due to rounding.

8.6 The data in Table 8.1 above indicates that there has been some modest growth in the number of convenience goods retailers in Westerham, from 5 in 2014 to 7 in 2021. The proportion of convenience goods retailers in the centre is now slightly above the national average.

8.7 There has been a noticeable reduction in the number of comparison goods retailers in the centre, from 28 in 2014 to 20/21 in 2020/2021. However, the proportion of comparison goods retailers in the centre (29.4%) remains slightly above the national average of 27.2%. The number of vacant units in the centre has remained, with 2 vacancies in 2014 and only one in 2020/2021. Vacant units comprise only 1.5% of all surveyed units in the town centre, against a national average of 14.1%.

8.8 A similar exercise has been undertaken for floorspace, by category, in Westerham and this is contained in Table 8.2 below.

Table 8.2: floorspace composition of Westerham town centre

Sector	**September 2014**			**December 2020**			**November 2021**		
	No.	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**	**No.**	**%**	**Ave (%)**
Convenience	8,500	9.6	15.2	9,700	11.3	15.4	9.700	11.3	15.4
Comparison	30,800	34.7	35.9	24,400	28.4	31.0	24,800	28.9	31.0
Retail Service	8,700	9.8	6.7	8,800	10.2	7.2	8,800	10.2	7.2
Other Retail	0	0.0	0.1	0	0.0	0.1	0	0.0	0.1
Leisure Services	31,100	35.0	24.4	36,000	41.9	25.6	32,300	37.6	25.6
Financial & Business Services	7,700	8.6	8.0	6,700	7.8	6.9	6,700	6.9	6.9
Vacant	2,100	2.4	9.0	400	0.5	13.3	3,700	4.3	13.3
Total	**88,900**	**100**	**100**	**86,000**	**100**	**100**	**86,000**	**100**	**100**

Notes: data provided by Experian GOAD and Avison Young surveys. Based on Experian GOAD Category report classification. Floorspace figures given in gross ground floorspace, square metres. Figures may not add due to rounding.

8.9 The data in Table 8.2 indicates that:

- the proportion of floorspace occupied by convenience goods retail provision has risen slightly over the assessment period but remains below the national average.
- In line with the fall in the number of units occupied by comparison goods retailers, there has also been a fall in the amount of floorspace occupied by this use. The decline in the proportion of comparison goods floorspace in Westerham mirrors the national average, with the amount in the centre remaining slightly below the national average.

- the proportion of floorspace occupied by retail and leisure services is, collectively, well above the national average for such uses. This has been a characteristic of the centre since 2014.
- Whilst the number of vacant units in the centre is low and has fallen over the period 2014-2021, the amount of vacant floorspace has risen slightly. However, like the number of units, it remains well below the national average.

Shopping Patterns

8.10 The results of the 2021 household survey provide the following key 'headlines' for the use of Westerham:

- the convenience goods shopping catchment of Westerham is confined to Zone 2 only.
- Westerham has a low share of main food shopping trips in Zone 2: 2.4% of first choice trips and 6.3% of second-choice trips.
- Its share of top-up food shopping trips from Zone 2 residents is much higher, with 45% of first choice trips and 33% of second choice trips.
- these market share levels lead to a total study area derived turnover of £4.6m, with £3.7m attracted to the Co-op store in High Street.
- Westerham has a modest market share of comparison goods shopping, with its catchment also limited to Zone 2. The highest levels of market share are achieved in relation to first choice clothing/footwear (8%) and health/beauty goods (17%). The centre has a study area derived comparison goods turnover of £1.8m, which is around one tenth of the level achieved by Edenbridge and Swanley.
- 55% of residents of Zone 2 visit Westerham centre at least once a week. This compares to a study area average of 62% visiting the main Sevenoaks District town centres at least once a week.
- local (Zone 2) residents have indicated that they are visiting Westerham more often now when compared with visitation rates before the pandemic.
- the most popular reasons for visiting Westerham centre are:
  - eating out: 48%
  - top-up food shopping: 35%
  - non-food shopping 28%
  - drinking / socialising: 24%
  - health care: 14%
  - main food shopping: 11%
- mode of travel to the centre is split relatively equally between the car (53%) and walking (45%). The proportion of people walking to Westerham centre is much higher than the average across the study area (30%).

- Westerham achieves the following market shares (amongst Zone 2 residents) in relation to leisure activities:
  - — cafes/restaurants: 47%
  - — pubs/bars: 40%

8.11 When compared with the results of the 2016 household survey the following 'headlines' :

- there has not been a significant change in the market share of Westerham for main food shopping, with the 2016 data showing a 6% share of first choice main food trips and 3% of second choice trips.
- there has been increase in Westerham's share of first choice top-up food shopping trips amongst Zone 2 residents, from 38% in 2016 to 45% in 2021.
- there has not a significant change in the market share of Westerham as a comparison goods shopping destination, although there has been a small drop in the market shares for furniture/floorcoverings/textiles and recreation goods.
- the frequency of usage of the centre has increased from 31% visiting at lease once a week to 53% visiting at least once a week.
- food shopping remains the main purpose for visiting the centre[42] (albeit for top-up food shopping, although there has been an increase in popularity in visits for eating/drinking[43].
- walking to the centre has increased significantly to the centre (12% in 2016 and 46% in 2021).

Usage of the Town Centre

8.12 In addition to the new (2021) household survey, the new in-street survey provides the following information regarding the usage of Westerham centre:

- the most popular main purposes of visits to Westerham in 2021 are split equally between food shopping and eating/drinking (21% apiece), followed by health/fitness (11%), socialising (9%) and non-food shopping (7%). This compares with eating/drinking (20%) and food / non-food shopping (12% apiece) in 2016.
- The average spend per trip on food/groceries is £4.43, with 29% of respondents spending between £0-£40 during their visit. This is a lower average spend on food/groceries than in 2016 (£7.4). 49% of respondents spent between £0-£50 on eating/drinking during their visit, which is very similar to the 48% found in the 2016 in-street survey.
- according to the results of the in-street survey, walking to the centre was the most popular mode of travel (at 45%), followed by the car (39%), which is a similar split to the results of the 2016 survey. The

[42] 39% in 2016, against 13% / 38% in 2021
[43] 2% in 2016 and 49% in 2021

average journey time was 20 minutes, with 48% of respondents spending up to one hour in the centre. The average journey time to the centre in 2016 was 11 minutes.

- at the time of the 2021 survey, the most popular shops and services were: Deli di Luca (20%), the Co-op (1%), Costa (15%), Nisa (17%) and Grasshopper on the Green (11%). In 2016, the most popular stores were: Nisa (55%) and Co-op (27%).
- 49% of survey respondents visit food shops in Westerham at least once a week, with 49% of this group also linking their trip with other shops and services in the centre. Linkages associated with non-food shopping trips is lower, at 32%.
- 68% of survey respondents visit the centre at least once a week during the daytime, with the corresponding figure for the evening being 15%. This is a lower rate of frequency of evening visits than was found in the 2016 in-street survey.

Conclusions

8.13 The foregoing analysis allows the following conclusions to be reached regarding the key aspects of the health of Westerham town centre:

- The proportions of convenience and comparison goods retailers in the centre are in line with the national average.
- There has been a drop in the number of comparison goods retailers the biggest change in the centre since 2014/2016.
- The proportion of service uses is well above the national average.
- Over the assessment period there has been a consistently low vacancy rate (which is well below the national average).
- The centre has a limited catchment for the centre for both convenience and comparison goods shopping (Zone 2)
- The centre attracts just under half of all first choice top-up food shopping trips from Zone 2.
- Lower average spend on food/groceries between 2016 (£7.4) and 2021 (£4.4)
- Retail turnover of the centre: £4.6m for convenience goods and £1.8m for comparison goods.
- Main reasons for visiting the centre are: eating out (48%), top-up food shopping (35%), non-food shopping (28%). Eating/drinking has increased in popularity (household survey), so has food shopping (in-street survey).
- High proportion of walking to the centre (45%) (compared with a SDC average of 30%) and compared with 2016.
- Westerham achieves a high market share in Zone 2 for cafes/restaurants (47%) and pubs/bars (40%).
- Frequency of visits to the centre has increased (according to household survey), with 49% of visitors using the centre at least once a week for groceries/food shopping purposes.

- Half of food shoppers linked their trip with another purpose
- There is now a lower frequency of visits to Westerham during the evening in 201 when compared with 2016.

9. New Ash Green – Health Check Indicators

Summary of Conclusions from 2016 Retail Study

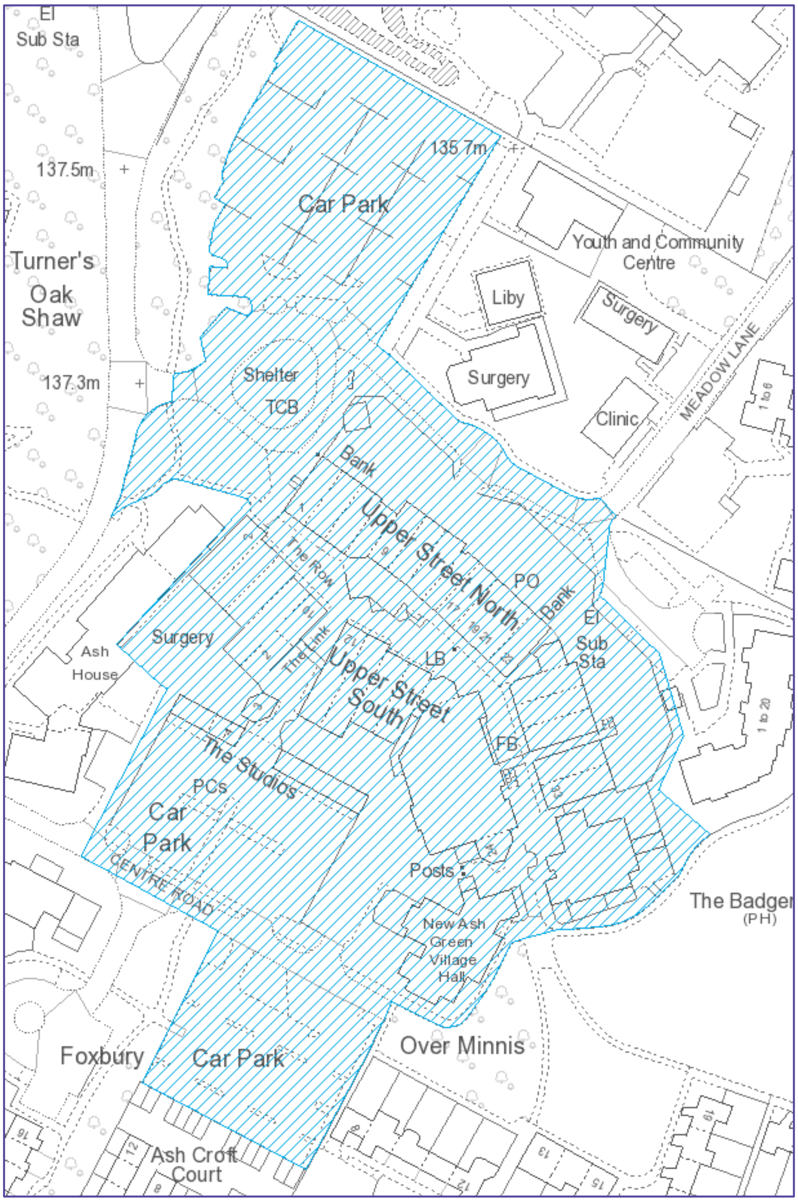
9.1 The 2016 retail study provided the following observations regarding New Ash Green:

- 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.
- 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, as well as an Oxfam, bakers, chemist, and pet shop/hardware store. In terms of a food and beverage offer, the centre has a number of cafes, take-aways and a public house.
- Vacancy data is not available from Experian 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.
- (n.b. a review of the shopping patterns and other survey information is contained later in this section)

Structure of the Town Centre

9.2 The polices map for the development plan defines a town centre boundary for New Ash Green, which is shown in Figure 9.1 below.

Figure 9.1: extract from development plan policies map for New Ash Green centre



9.3 The defined town centre boundary, as shown in Figure 9.1 above, includes properties around Upper Street North / South, along with car parking areas accessed from Centre Road and Ash Road. Within the development plan, New Ash Green is identified as a village centre.

9.4 Policy LO7 of the Core Strategy notes that:

> *"In New Ash Green the village centre will be regenerated so that it better meets the needs of the local community whilst respecting the distinctive character of the settlement".*

9.5 This is re-emphasised by paragraph 5.35 of the Allocations and Development Management Plan[44], which notes that:

> *"Core Strategy Policy LO7 states that New Ash Green village centre will be regenerated so that it better meets the needs of the local community whilst respecting the distinctive character of the*

[44] the regeneration policy in both development plan documents includes an allocation which covers the same area as the defined centre boundary.

settlement. Policy TLC4 will apply to the village centre, see Appendix 8, until the centre is redeveloped. Following the redevelopment, the policy will apply to the main retail and service area of the village centre, which should be identified through any planning application. In order to ensure consistency with other village centre boundaries, the car parks in New Ash Green village centre are identified as within the centre boundary".

Land Use Profile

9.6 As noted in the 2016 retail study, Experian GOAD do not undertake regular surveys of New Ash Green and therefore a time-series comparison is not possible. However, AY have undertaken a land use survey of the village centre in December 2021 with the results contained in Table 9.1 below.

Table 9.1: New Ash Green village centre

Sector	Units			Floorspace (sq ft)		
	No.	%	Ave (%)	No.	%	Ave (%)
Convenience	4	10.5	9.2	16,400	32.7	15.4
Comparison	3	7.9	27.2	10,000	19.9	31.0
Retail Service	8	21.0	15.6	4,600	9.2	7.2
Other Retail	0	0.0	0.1	0.0	0.0	0.1
Leisure Services	10	26.3	24.5	10,400	20.7	25.6
Financial & Business Services	6	15.8	9.2	7,300	14.5	6.9
Vacant	7	18.4	14.1	1,500	3.0	13.3
Total	**38**	**100**	**100**	**50,200**	**100**	**100**

Notes: source of data Avison Young survey, December 2021.

9.7 The data in Table 9.1 above indicates that:

- New Ash Green has a proportion of convenience goods retailer units which is commensurate with (and slightly above) the national, although the amount of floorspace, which is dominated by the Co-op food store, is twice the national average (indicating the dominance of convenience retail – i.e. the Co-op store).
- The amount of units and floorspace occupied by comparison goods retailers is below the national average. There are three comparison goods retailers occupying around 10,000sq ft of floorspace.
- The amount of units occupied by retail, leisure and financial/business services across the village centre is well above the national averages in these categories, emphasising the important role that New Ash Green plays as a service centre for the local community.
- Finally, the proportion of vacant units in the village centre is above the national average, although the proportion of vacant floorspace is below average, suggesting that vacant units in the centre are comparatively small in size.

Shopping Patterns

9.8 The results of the 2021 household survey provide the following key 'headlines' for the use of New Ash Green:

- New Ash Green has a convenience goods shopping catchment which is limited to Zone 4 of the study area, with a clear emphasis on top-up food shopping. The centre has a 1% share of first choice main food trips and 10% of second choice main food shopping trips amongst Zone 4 residents, which rises to 21% for first and second choice top-up food trips.
- These market shares lead to a total study area derived convenience goods turnover for the centre of £5.2m, with £4.9m of this flowing to the Co-op store.
- Like convenience goods, the comparison goods shopping catchment area for New Ash Green is limited to Zone 4 of the study area. Within Zone 4, the village centre has a limited market share, including:
  - 2.2% of first choice clothing/footwear trips
  - 1% of first choice DIY shopping trips and 4% of second choice DIY trips
  - 2% of shopping trips associated with health and beauty goods
  - A 9% share of first choice shopping trips for recreational goods and a 11% share of second choice trips for these goods
- The above market shares lead to a study area derived comparison goods turnover for New Ash Green of £3.2m[45].
- 25% of local residents visit New Ash Green at least once a week, which is well below the average frequency of visit (of at least once a week) across the study area of 62%.
- 81% of respondents who visit New Ash Green indicated that they were not visiting the centre with any different frequency after the easing of restrictions associated with the pandemic. 10% indicated that they were visiting the centre less often, with 4% indicating that they were visiting more often.
- the most popular reasons for visiting New Ash Green are:
  - top-up food shopping: 43%
  - non-food shopping 23%
  - chemist/pharmacy 24%
  - main food shopping 15%
  - eating out 20 %
- 68% of visitors to the centre made their journey by car, with 26% walking.
- New Ash Green achieves the following market shares (amongst Zone 4 residents) in relation to leisure activities:
  - cafes/restaurants: 9%

[45] as estimated by the quantitative assessment prepared for this study.

— pubs/bars: 18%

— health / fitness clubs: 14%

9.9 When compared with the results of the 2016 household survey the following 'headlines' :

- there has been no change in the market share of New Ash Green for top-up food shopping trips, although the village centre did not register at all in the 2016 survey for main food trips.
- there has been very little change overall in the low market share of the centre for comparison goods shopping trips from Zone 4 residents.
- there has been a noticeable drop in the frequency of usage of the centre, from 56% of local residents visiting at least once in week in 2016 to around half that amount in 2021.
- the split between the main purposes for visiting the centre has not altered between 2016 and 2021, with food shopping remaining the most popular, followed by healthcare services and then non-food shopping. The proportion of local residents indicating that they used the village centre for eating/drink out has increased over the past five years.
- in relation to the mode of travel to the centre, this has remained reasonably static over the past five years, although there has been a small increase the proportion of journeys by car and a corresponding (small) fall in the proportion of journeys on foot.

Usage of the Town Centre

9.10 In addition to the new (2021) household survey, the new in-street survey provides the following information regarding the usage of New Ash Green village centre:

- mirroring the results of the household survey, the in-street also indicates that most popular main purpose of visit to New Ash Green is food shopping (43%). However, differences appear in relation to the other main reasons for visiting the centre, with non-food shopping becoming more popular (24%), with healthcare reasons less popular (6%). This compares to 60% of respondents indicating that their main reason for visiting in 2016 was food shopping in 2016, with a lower level for non-food shopping (4%).
- The average spend per trip on food/groceries is £7.75, with 47% of respondents spending between £0-£40 during their visit. This is a lower average spend on food/groceries than in 2016 (£15.7).
- The average spend across other retail and service categories, as recorded by the 2021 in-street survey, is very low (in line with the general levels of usage recorded in both the household and in-street surveys), with 10% of respondents spending between £0-£10 on eating/drinking during their visit, which is very similar to the 12% found in the 2016 in-street survey.
- according to the results of the in-street survey, walking to the centre was the most popular mode of travel (at 51%), followed by the car (47%), which is a reversal to the results of the 2016 survey.

- The results of the 2021 in-street survey indicate that the average journey time to the village centre was 8 minutes, with 84% of respondents spending up to one hour in the centre. 80% of respondents to the 2016 in-street survey indicated they spent up to one hour in the centre.
- at the time of the 2021 survey, the most popular types of shops and services were: 53% foodstores, 10% general stores, 16% charity shops, 14% post office and 10% restaurants/cafes. The Co-op store was visited by 51% of respondents, with 24% McColls, 14% visiting Oxfam and 14% visiting the Village Bakery. In 2016, 90% of survey respondents visited the Co-op store on their visit.
- 80% of survey respondents visit food shops in New Ash Green at least once a week, with 22% of this group also linking their trip with other shops and services in the centre.
- 84% of survey respondents visit the centre at least once a week during the daytime, with the corresponding figure for the evening being very low, at 2%. Both of these levels of frequency are slightly lower than the 2016 in-street survey.

Conclusions

9.11 The foregoing analysis allows the following conclusions to be reached regarding the key aspects of the health of New Ash Green village centre:

- The proportion of convenience goods retailers in the centre is similar to the national average, although the proportion of space occupied by this category is double the national average.
- There is a lower than average proportion of comparison goods retailers, alongside two-thirds of units in the centre being occupied by service uses.
- New Ash Green is able to attract a small amount of second choice main food shopping trips from Zone 4 residents, although the centre is much more popular as a top-up food shopping destination (primarily the Co-op store), attracting around one fifth of all trips from Zone 4.
- There has been no change in the market share of New Ash Green for top-up food shopping trips, although there appears to have been a marginal increase in the popularity of the village centre for second choice main food trips.
- Noticeable fall in the frequency of visits to the village centre, from 56% visiting at least once a week in 2016 to around half that amount in 2021.
- Therefore has been modest growth in local residents using the centre for eating / drinking out over the past five years and also a small increase in the proportion of local residents travelling to the village centre by car and corresponding (small) fall in the proportion of journeys on foot.
- There has also been a drop in the average spend on food goods in the centre over the past five years, alongside low levels of average spend on other retail and service uses.

- Four-fifths of visitors spend up to one hour in the centre, whilst foodstores / general stores remain the most frequently visited stores, although the Co-op appears to be comparatively less popular (albeit still the most popular single store).

10. Assessment of Retail Floorspace Need

Introduction

10.1 A further contributory element to the preparation of town centre strategies for Sevenoaks, Swanley, Edenbridge, Westerham and New Ash Green has been an assessment of retail floorspace need. An assessment of 'need' has being an element of plan-making for retail and main centre uses for a number of years, with paragraph 85(d) of the current version of the NPPF noting that:

> *"allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary"*

10.2 This policy is supported by the contents of the NPPG which, in addition to accommodating identified 'needs' via the sequential test, notes that town centre strategies should establish inter alia:

> *"the realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed……….*
>
> *the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space. It can involve evaluating different policy options (for example expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change".*

10.3 Within previous versions of the NPPF, national policy has indicated that 'needs' can be identified via qualitative and quantitative factors, although this aspect has been removed from the latest versions of the NPPF. However, we consider that it remains best practice to examine both factors and our assessment is summarised in this section (alongside the quantitative need statistical analysis contained in Appendix II).

Quantitative Need

Introduction

10.4 The most recent assessment of quantitative retail floorspace need in Sevenoaks District was undertaken in the 2016 retail study. That assessment provided individual forecasts for convenience and comparison goods floorspace in Sevenoaks, Swanley and Edenbridge, plus a combined forecast for the 'local service centres' including Westerham and New Ash Green. The period of assessment stretched from 2020 to 2035, with interim forecasts provided for 2025 and 2032[46].

10.5 For the purposes of this current study, it has been agreed that the 2016 retail study quantitative need forecasts would be updated using: (A) the latest available retail expenditure forecasts; and (B) informed by

[46] for forecasts for 2030 and 2035 were stated as being indicative only.

new empirical research. This sub-section outlines the various data sources and assumptions which have been adopted in order to prepare our quantitative need forecasts.

10.6 Quantitative need is conventionally measured as expenditure capacity, i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area. Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.

10.7 Quantitative capacity forecasts are reliant on a series of data sources which are regularly updated in response to various factors including UK economic forecasts and the performance of retailers. The section covers the following areas:

- Study area
- Population data
- Per capita retail expenditure forecasts
- Data on shopping patterns for convenience and comparison goods shopping
- Commitments for retail floorspace
- Floorspace efficiency levels
- Benchmark turnover levels of existing and committed retail floorspace
- The timeframe for the assessment and the use of the quantitative capacity forecasts

Study Area and Shopping Patterns Data

10.8 Given the scale of Sevenoaks District, along with its wider catchment, the study area for this assessment is required to be necessarily large. The study area will need to capture shopping patterns associated with each of the main town centres and the average spending levels of those people who use these centres. A plan showing the extent of the study area and the constituent sub-zones is contained at Appendix I to this document, with the following points to be noted:

- The study area / household survey area covers the same geographic area as the exercise undertaken for the 2016 retail study. Like the 2016 survey, the study area is based upon postcode sector areas.
- However, for budgetary reasons, the number of survey zones has been reduced from 16 to 8:
    - The survey zones which covered the five main settlements subject to this study (Sevenoaks, Swanley, Edenbridge, Westerham and New Ash Green) have been retained in order to provide the best quality data for these areas.
    - Looking beyond the immediate catchment of the five main settlements, the remaining zones in the 2016 survey has been amalgamated into three larger zones. However, in order to continue to be able to provide a time-series analysis, the zones which were amalgamated have not been

amended – i.e. Zone 1 of the 2021 household survey is an amalgam of Zones 1 and 4 of the 2016 household survey.

10.9 As set out in Section 4 of this report, the 2021 household survey has been structured to collect data on the following convenience and comparison shopping activities:

- First choice and other main food shopping destinations
- First choice and other top-up food shopping destinations
- First and second choice destinations for the following types of comparison goods:
  - Clothing and fashion goods
  - Furniture, floorcoverings and household textiles
  - DIY goods
  - Domestic appliances
  - Smaller electrical goods
  - Health and beauty goods
  - Recreation and luxury goods

10.10 The results of the household survey have been weighted against the age profile of each individual zone and have been summarised in Table 4 at Appendix II (for convenience goods shopping) and Table 6 at Appendix II (for comparison goods shopping).

10.11 For the purposes of our assessment, and in order to provide consistency with the 2016 retail study assessment, 'don't know', internet/on-line, and 'don't do' responses have been removed from the results and the market share data re-based.

Timeframe for the Quantitative Assessment

10.12 The timeframe for the new assessment extends from the year in which the town centre strategy document is intended to be published (2022) to 2040, with interim forecasts for 2027 and 2032.

10.13 The current version of the NPPF indicates that local authorities should *"allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, <u>looking at least ten years ahead</u>".* The PPG also notes, in relation to the preparation of town centre strategies, that *"Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed"*.

10.14 Therefore, there is no compulsory requirement for this quantitative assessment to run all the way to 2040 although we have done so in order to provide some broad informal guidance, with 2022 and 2032 forecasts provided in order to meet NPPF policy and NPPG guidance.

10.15 However, it should be noted when absorbing the content of our quantitative assessment that the forecasts will become less reliable over time due to nature of the economic forecasts which will be influenced by external factors some of which will be unforeseen. As a consequence, we would recommend that the first five years of the assessment is the focus for the retail strategy (i.e. up to 2027).

Population

10.16 In line with the approach taken in the 2016 retail study, our quantitative need assessment adopts population forecasts provided by Experian. Population levels for each of the study area zones are shown in Table 1 at Appendix II.

Per Capita Retail Expenditure Data and Future Forecasts

10.17 New per capita retail expenditure data has been obtained from Experian[47]. The data provided is set at a 2020 base level and has been projected forward based upon the forecast change in per capita retail expenditure for convenience and comparison goods is based upon advice within Experian's Retail Planner Briefing Note 19, published in January 2022. These latest forecasts take into account, at the time of finalising this report, the latest available data on the potential implications of the COVID-19 pandemic on the retail sector.

10.18 Per capita retail expenditure for convenience and comparison goods is shown in Tables 2a-2d at Appendix II for 2022, 2027, 2032 and 2040.

10.19 It should also be noted that whilst section 3 of this document outlines some potential scenarios as the UK economy eventually moves out of the peak of the crisis it is very likely that the situation will continue to evolve over the next 12-18 months. As a consequence, we would recommend that the latest available forecasts from Experian are adopted for the purposes of any future updates to the quantitative assessment as the preparation of the new Local Plan progresses.

Commitments

10.20 As part of the assessment of future quantitative retail floorspace need it is important to include any significant commitments. Therefore, data on retail and other main town centre land use commitments has been provided by the Council. This data has been reviewed and we have concluded that, whilst there are some implemented planning permissions which will change the amount of retail floorspace in the District, they are not, in our opinion, of a scale which needs to be included in the quantitative assessment forecasts.

Benchmark Turnover Levels

[47] February 2022

10.21 Within the 2016 retail study two different approaches were taken for benchmark turnover levels for the convenience and comparison goods assessments. For convenience goods floorspace, it is common for the benchmark turnover of a selection of existing floorspace to be calculated using the existing net floorspace and company average sales densities for individual national multiple retailers and an assumed average for other convenience goods floorspace in defined 'town centres' and elsewhere. We remain with this approach in this assessment and have:

- updated the sales density information for named national multiple retailers using the latest research undertaken by Verdict and Mintel[48]; and
- including data on new store openings since the previous studies.

10.22 For the comparison goods assessment, the 2016 retail study adopted an approach which assumed that the supply and demand was in equilibrium at the base year for the assessment (i.e. the level of actual comparison goods turnover/expenditure attracted to each settlement was the same as the benchmark turnover at the base year)[49]. This is a common approach and is used, in our experience, in circumstances where there is a lack of data on exiting floorspace / average sales density figures and / or where this is not a recent (previous) quantitative assessment which uses broadly the same parameters as the latest study.

10.23 In this instance, the 2016 retail study does provide that link and therefore it is possible to undertake an assessment which continues to utilise the benchmark turnovers devised and agreed for the purposes of the 2016 study. However, as a sensitivity test, we have also undertaken an alternative assessment which adopts the same approach as the 2016 study – i.e. actual turnover equals benchmark turnover at the base year of 2022.

Floorspace Efficiency

10.24 Finally, our convenience and comparison goods capacity assessments both make an allowance for changes in floorspace efficiency over the assessment period. The assumptions that have been made are taken from recommendations made by Experian in its Retail Planner Briefing Note (Note 19, January 2022).

Market Share Levels

10.25 As noted above, the current market share levels shown in the 2022 baseline analysis are taken from the household survey commissioned for this Study. The capacity tables (Tables 10a-10e and Tables 11a-11f) show the overall market share of stores in each settlement. This market share is based upon 'physical' stores in each settlement.

10.26 For the purposes of this assessment, like the content of the 2016 retail study, it has been assumed that the market share of each settlement remains static over the assessment period.

[48] Retail Rankings, 2021 edition and research from GlobalData provided in 2021.
[49] for example, the actual comparison goods turnover of all stores in Sevenoaks at 2016 was £253m and this, therefore, was assumed to also be the benchmark turnover of those stores at the same year.

Basis for quantitative capacity forecasts

10.27 For the avoidance of doubt, the quantitative capacity forecasts outlined in this section are for the whole of each town, not just town centres and are cumulative in nature – i.e. the quantitative capacity of 3,603sq m net at 2027 for Sevenoaks for convenience goods floorspace includes the 3,640sq m net capacity at 2022.

10.28 The assessment is structured to provide individual convenience goods forecasts for each of the five main settlements. For comparison goods, our assessment concentrates upon Sevenoaks, Swanley and Edenbridge, like the 2016 retail study. This approach is based upon our opinion that it can be difficult to provide a meaningful assessment of comparison goods quantitative need given the small size and catchment of Westerham and New Ash Green.

10.29 As noted above, it should be noted that the results of the quantitative assessment represent only half of the overall assessment of need (with the other half being qualitative indicators). Moreover, in order to understand whether it is appropriate to use the results of the quantitative assessment to plan for new, replacement or changing levels of floorspace provision, it will be important to understand the key factors influencing the quantitative assessment. Therefore, any forecasts which show actual levels of current and future turnover diverting from benchmark turnover are referred to as a 'surplus' or 'deficit' which need to be understood along with the wider set of factors.

10.30 We now turn to the assessment of need for each of the main settlements.

Quantitative Aspects of Retail Floorspace Need

Sevenoaks

10.31 Table 10a outlines our assessment of quantitative need for convenience goods floorspace in Sevenoaks. Based upon the content of the preceding quantitative assessment, Table 10a indicates that all convenience goods stores in the town attract £232.9m at 2022 which can be compared against a benchmark turnover of £189.2m. This leads to a level of 'surplus' convenience goods expenditure of circa £44m which translates to an indicative floorspace capacity of 3,640sq m net.

10.32 The level of 'surplus' expenditure does not change significantly over the assessment period, rising £44m in 2027, £49m in 2032 and £57m in 2040. This translates to an indicative 'surplus' floorspace capacity of 3,600sq m net by 2027, 4,000sq m net by 2032 and 4,660sq m net by 2040.

10.33 When examining the above indicative forecasts and the contents of Table 10a it should be noted that a large majority of the 'surplus' convenience goods expenditure shown in Table 10a is driven by the actual turnover of a number of out of centre stores trading above their respective company average benchmark levels (including Tesco, ALDI and Lidl). The only large out of centre store to trade below its respective benchmark turnover is the Sainsburys, although the difference is not large (£59m against £64m) and the turnover of the Sainsburys store itself is, by some way, the largest turnover of a single supermarket in Sevenoaks. Within Sevenoaks town centre, most floorspace trades below benchmark levels, the exception to this is the Marks & Spencer Foodhall.

10.34 As a consequence of the above, and the contents of the wider quantitative assessment, we do not consider that there is a particularly pressing need to plan for net additional convenience goods floorspace in Sevenoaks from a quantitative perspective.

10.35 Turning to comparison goods, our quantitative assessment is contained in Tables 11 and 11b at Appendix II. As explained above, two alternative assessment scenarios have been provided: one which links the benchmark turnover of existing floorspace back to the data used in the 2016 retail study, and an alternative which assumes that, at the base year for the assessment (2022), benchmark turnover is the same as actual turnover.

10.36 Table 11a, which provides a link back to the 2016 retail study, indicates that comparison goods stores in Sevenoaks attract £214m of expenditure from residents of the study area. This can be compared with the forecast £253.5m[50] for all stores in the 2016 retail study. Therefore, there is evidence to show a significant (circa £40m) fall in turnover in stores in Sevenoaks over the past five years, which, in itself, is a significant factor to inform the whole of the town centre strategy study. When compared with the benchmark turnover for 2022, as estimated by the 2016 retail study (£285.4m), this leads to an indicative ‘deficit’ of comparison goods expenditure of circa £71m which is equivalent to an indicative over-supply of circa 12,000sq m net. Taking into account an allowance for increases in floorspace efficiency (which soak up a large part of the forecast increases in comparison goods expenditure over the assessment period), the ‘deficit’ in expenditure continues over the assessment period.

10.37 Even on the basis of the alternative equilibrium approach, the level of potential future capacity for comparison goods floorspace in Sevenoaks is minimal. The ‘surplus’ capacity is circa 90sq m net at 2027, rising marginally to 660sq m in 2032 (which is beyond the timeframe for any firm future predictions) and is much lower than the forecasts contained within the 2016 retail study. This is caused by three main factors: (A) a lower market share over the assessment period caused by an increase in the proportion of retail expenditure redirected to on-line sales; (B) the assumption (as recommended by Experian) that a large part of future comparison goods expenditure growth should be allocated to existing floorspace to allow for increases in floorspace efficiency; and (C) a generally lower level of forecast growth in comparison goods expenditure available to ‘physical’ stores.

Swanley

10.38 Table 10b at Appendix II outlines our quantitative assessment for convenience goods floorspace in Swanley. It indicates that existing floorspace attracts a total study area derived turnover of circa £75m, which is equivalent to a market share across the study area of 6.8%. When compared with a benchmark turnover £66m this leads to a ‘surplus’ level of convenience goods expenditure of circa £9m, equivalent to an indicative floorspace of 700sq m net. Over the assessment period, and assuming a constant market share, the level of ‘surplus’ expenditure grows slightly to £8m in 2027, £9m in 2032 and £12m in 2040. This is equivalent to a net indicative floorspace capacity of around 700--950sq m net between 2027 and 2040.

[50] 2014 prices

10.39 When the actual turnover of stores is compared against the respective benchmark turnover levels, it is to be noted that almost all of the 'surplus' expenditure is driven by the performance of one store: ALDI. This store has an actual forecast convenience goods turnover of £20m against a benchmark turnover of £6m and creates 'capacity' for two reasons: (A) the very successful trading performance of this store in its own right (which is, no doubt, in part reflective of the growing popularity of these types of stores across the UK); and (B) the small size of this store (which is reflective of its age). Swanley has the advantage of all major convenience goods floorspace being located in the town centre, with good associated levels of market share and turnover. There does not appear to be a strong quantitative case for planning for net additional floorspace provision through the opening of a new store, although the forecast trading performance of the ALDI store would suggest that any opportunities to allow for the expansion of this store in the town centre should be supported (alongside any further town centre improvements).

10.40 Our comparison goods quantitative assessment for Swanley is contained in Tables 11c and 11d, with both assessments showing a 'deficit' up to 2027, with only a small 'surplus' capacity in the equilibrium scenario between 2032 and 2040.

Edenbridge

10.41 Table 10c at Appendix II outlines our quantitative assessment for convenience goods floorspace in Edenbridge. It shows that the collective convenience goods turnover of all existing stores/floorspace is £51.5m which can be compared against a (lower) collective benchmark turnover of £35.1m. This leads to a 'surplus' level of convenience goods expenditure of £16.3m at 2022, rising slowly to £16.7m in 2027, £17.9m in 2032 and £19.9m in 2040.

10.42 This equates to an indicative 'surplus' level of capacity of between 1,300sq m net and 1,600sq m net between 2022 and 2040.

10.43 The two main contributors to the estimated level of 'surplus' expenditure are the town centre Waitrose and the out of centre Lidl store. Other stores in Edenbridge town centre are forecast to trade below their respective benchmark turnover levels. Based upon the market share analysis undertaken earlier in this report, it would appear that part of the reason for the current level of collective turnover has been ability of the Lidl store to raise Edenbridge's convenience goods market share without a significant negative impact upon the market share and turnover of stores in the town centre. This increase in market share, alongside the successful trading performance of the two larger stores, are the main reasons why indicative floorspace capacity remains in 'surplus' and is similar to the contents of the 2016 retail study. When deciding whether to plan for net additional convenience goods floorspace in Edenbridge in light of these quantitative forecasts, a number of factors will, in our opinion, need to be taken into account: (A) the findings of the qualitative assessment; (B) the increased level of choice which is now provided in the town (following the opening of the Lidl and Home Bargains stores); and (C) the need to protect the health of the town centre.

10.44 Tables11e and 11f outline our quantitative need forecasts for comparison goods expenditure / floorspace in Edenbridge. Under both scenarios, there is forecast to be limited 'surplus' expenditure or floorspace due to the low market share of Edenbridge for comparison goods shopping and also the assumption (in line with the other two centres) to allocate a large element of future expenditure growth to supporting existing floorspace (which is mainly in the town centre in Edenbridge).

Westerham – convenience goods

10.45 Our convenience goods expenditure / floorspace forecasts for Westerham are contained in Table 10d at Appendix II. It shows that the current level of expenditure attracted to convenience goods store in Westerham from study area residents is circa £5.2m, which is equivalent to a small market share of 0.5%. The benchmark turnover of existing stores is estimated to be circa £6.4m, therefore leading to a small 'deficit' in expenditure capacity. A comparison between the benchmark turnover and study area derived turnover of existing stores reveals a very good trading performance for the Co-op and below benchmark performance for other smaller town centre stores. Whilst it will also be important to take into account qualitative indicators, the low level study area derived turnover, coupled with the lack of an obvious 'surplus' in expenditure would suggest that there is no quantitative basis for planning for net additional convenience goods floorspace in Westerham.

New Ash Green – convenience goods

10.46 The final convenience goods assessment, at Table 10e at Appendix II, is for New Ash Green. The assessment shows that existing stores attract circa £5.8m of convenience goods expenditure from the study area, which can be compared against a benchmark turnover of circa £7.5m. The majority of turnover / expenditure in both amounts is attributable to the Co-op store in the village centre which is assessed to trade slightly below its benchmark. The assessment at Table 10e shows that there is an indicative deficit of around £1.5m - £1.7m over the assessment period which is equivalent to an indicative floorspace over-provision of circa 120sq m net – 140sq m net. Based upon the size of New Ash Green and its role/function in the local retail hierarchy it appears that there is no pressing need, from a quantitative perspective, for a net increase in convenience goods floorspace provision.

Summary[51]

10.47 Table 10.1 below summarises the results of our quantitative assessment for convenience goods floorspace and sets this alongside the forecasts in the 2016 retail study.

Table 10.1: summary of convenience goods quantitative assessment (including results of previous 2016 retail study assessment

[51] for the avoidance of doubt, all of the quantitative expenditure / floorspace capacity forecasts quoted in this report are cumulative.

SEVENOAKS							
	2020		**2025**		**2030**		**2040**
		2022		**2027**		**2032**	
2016 retail study	5250		5716		6175		6467
2021 draft interim forecasts		3640		3603		4010	4660
SWANLEY							
	2020		**2025**		**2030**		**2040**
		2022		**2027**		**2032**	
2016 retail study	1077		1258		1435		1556
2021 draft interim forecasts		729		672		764	951
EDENBRIDGE							
	2020		**2025**		**2030**		**2040**
		2022		**2027**		**2032**	
2016 retail study	823		897		960		1001
2021 draft interim forecasts		1362		1367		1461	1620
WESTERHAM							
		2022		**2027**		**2032**	**2040**
2016 retail study							
2021 draft interim forecasts		-105		-105		-96	-82
NEW ASH GREEN							
		2022		**2027**		**2032**	**2040**
2016 retail study							
2021 draft interim forecasts		-134		-141		-135	-124
[all forecasts given in square metres net sales for convenience goods floorspace only]							

10.48 A similar exercise is undertaken for comparison goods floorspace in Sevenoaks, Edenbridge and Swanley.

Table 10.2: summary of comparison goods quantitative assessment (including results of previous 2016 retail study assessment

SEVEN OAKS							
	2020		**2025**		**2030**		**2035**
		2022		**2027**		**2032**	
2016 retail study	3095		7162		12059		17092
2021 draft interim forecasts - link to 2016 retail study		-11846		-11755		-11186	-9958
2021 draft interim forecasts - equilibrium approach		0		91		660	1889
SWAN LEY							
	2020		**2025**		**2030**		**2035**
		2022		**2027**		**2032**	
2016 retail study	355		822		1382		1967
2021 draft interim forecasts - link to 2016 retail study		-574		-599		-567	-456
2021 draft interim forecasts - equilibrium approach		0		-24		7	118
EDEN BRIDGE							
	2020		**2025**		**2030**		**2035**
		2022		**2027**		**2032**	
2016 retail study	250		583		966		1360
2021 draft interim forecasts - link to 2016 retail study		724		736		790	924
2021 draft interim forecasts - equilibrium approach		0		12		67	200
[all forecasts given in square metres net sales for comparison goods floorspace only]							

Qualitative Aspects of Need and Summary of Overall Assessment

10.49 With regards to qualitative aspects of retail floorspace 'need', this has never been defined precisely by national planning policy and, instead, best practice has, in our experience, been to consider the specific factors relevant to an individual settlement / geographic area. Until it was withdrawn several years ago, the Practice Guidance on Need, Impact and Sequential Approach provided a number of common-sense suggestions, including factors relating to: deficiencies or 'gaps' in existing provision; consumer choice and competition; overtrading, congestion and overcrowding of existing stores; location specific needs such as deprived areas and underserved markets; and the quality of existing provision.

10.50 With regards to convenience goods floorspace provision, we consider that the following factors are relevant to the five main settlements:

- Sevenoaks. Sevenoaks has, for a lengthy period of time, had a good selection of foodstores / supermarkets across the town. This has improved in the past dozen or so years with extensions to the large Sainsburys and Tesco stores and the addition of the ALDI store. These additions have all been in out of centre locations and it should be noted that existing stores in the town centre have a mixed performance. Therefore, based upon the factors outlined above, there does not appear, in our opinion, to be a pressing need from a qualitative perspective to plan for net additional convenience goods floorspace in Sevenoaks. Instead, we consider that there is a need to protect and reinforce the quality of convenience floorspace provision within the town centre.
- Swanley. Swanley has the advantage of accommodating all of its major convenience goods floorspace within its town centre. Provision is dominated by the large ASDA supermarket, supported by the adjacent ALDI and Iceland stores and the Co-op store in the eastern part of the centre. Collectively, these stores provide a good range of choice and competition in a location which also faces strong competition from provision in surrounding settlements. These stores are also able to accommodate both main and top-up food shopping trips. As a consequence of the above factors, we do not consider

that there is a strong qualitative justification for an increase in convenience goods floorspace provision in Swanley, although, as noted earlier in this section, any opportunities to make modest improvements in provision across the town centre should be encouraged.

- Edenbridge. Several years ago, a proposal for a large new Sainsburys store in Edenbridge did not progress, although one of the benefits of that proposal was that it would have increased choice and competition, albeit in an out of centre location. Subsequently, a proposal for new Lidl and Home Bargains stores was approved and these stores are now trading. This has also increased choice and competition in the town centre and available evidence suggests that part of the previously identified deficiency has now been filled with evidence that the 'leakage' of convenience goods shopping trips has, in part, been stemmed. In general terms, a number of the larger stores in the town trade well, although there is no particular evidence of over-trading or congestion. As a consequence, we do not consider that there is a strong qualitative case for a further net increase in convenience goods floorspace provision in Edenbridge, which is emphasised by the need to protect town centre health at a time when vacancy levels remain high (and above the national average).
- Westerham and New Ash Green. When judging the qualitative aspects of convenience goods floorspace provision in Westerham and New Ash Green, a key consideration should be their size and function in the wider retail hierarchy. Both are smaller than the other three settlements in our assessment and the available evidence from both the 2016 and 2021 household surveys indicates that they concentrate upon top-up food shopping needs. In principle, the ability of these settlements to provide for a greater amount of main food shopping needs would be welcomed although there is a need for realism in terms of their ability to attract a grocery operator that would be able to fulfil this function (due to the size of their catchment). Therefore, whilst it could be said that there is gap in existing provision, this is unlikely to be filled from a commercial perspective, with the outcome being that there is no strong qualitative case for an intervention from the Council to change this character.

10.51 For comparison goods floorspace provision, we consider that the following factors are relevant:

- General considerations. An over-arching issue for comparison goods floorspace provision across the whole of the District is the general state of this particular retail sector nationally and how this may translate itself to local 'town centre' provision. Even if the on-going (and to a certain extent, unknown) effects of the COVID-19 pandemic are set aside, the comparison goods sector continues to face significant negative pressure from rising internet sales and structural change. This leads to a situation whereby demand for space has generally decreased, with mid and smaller sized centres hit the hardest, as retailers concentrate their attentions on fewer stores in the larger centres. Therefore, notwithstanding the significant fall in quantitative forecasts since the 2016 retail study, qualitative factors would also generally point towards falling levels of need in terms of choice and competition.
- Sevenoaks. Sevenoaks is, by far, the largest comparison goods shopping destination in the District and this is where, in the past, the greatest opportunities have been for improvements in choice and competition and the quality of floorspace (particularly in order to compete with surrounding towns and other large shopping destinations such as Bluewater). In particular, it has provided the best

opportunities to attract national multiple comparison goods traders to sit alongside local independent traders. However, structural change in the sector, along with forecast falling turnover levels (assessed by this current study), mean that, in our opinion, there will be a shift in focus from providing net additional floorspace to retaining existing provision in the town centre. In line with the national trend, this may prove a challenge for Sevenoaks, and the available evidence suggests that the size of comparison goods sector in its town centre is already shrinking.

- Swanley & Edenbridge. These two town centres lie in the middle of the 'town centre' hierarchy in the District and have historically provided a modest level of comparison goods floorspace which has included a mixture of national multiple and local independent traders.
    - There is a material difference between these two centres, with Swanley able to attract a much higher proportion of national multiple retailers, which may well be a product of the modern post-war design of part of the centre and its location. In our view, whilst there is much to do in terms of the character and appearance of Swanley town centre, the quality of provision, in terms of choice and competition, is good, with no obviously significant opportunities for significant net expansion of space. The owners of the western part of the town centre have already identified that the area of qualitative improvement is in relation to the quality of floorspace which is being provided in the centre and efforts to revitalise the western part of the centre broadly in line with recent redevelopment proposals should be encouraged.
    - For Edenbridge, the comparison goods retailer offer is smaller in scale and more local/independent in nature, with fewer opportunities to materially change the quality of provision. In this centre, the focus is more likely to be driving choice and competition through a differentiated retail offer, focusing upon niche retailing which sets itself apart from surrounding higher order centres. Whilst the planning system cannot control the identity of particular retailers/businesses in a centre, it can help to set the conditions for a successful centre through careful master-planning, property design and the scope of the development management regulatory regime. Some health check indicators point towards a town centre in Edenbridge whose retail sector is now, in part, too large to meet demand and a more flexible regime may well be justified in order that the quality of provision is supported by greater diversity.
- Westerham & New Ash Green. Bearing in mind the place of these two centres in the 'town centre' hierarchy, and their associated role and function, opportunities to improve qualitative aspects of comparison goods floorspace provision will be limited.

10.52 In light of the foregoing analysis, our assessment of quantitative and qualitative factors points towards a situation where there is no overriding need for a material net increase in either convenience or comparison floorspace provision in any of the five main settlements in the District. This is due to a combination of factors, including a good level and choice of provision in relation to convenience goods floorspace and national/local factors which will limit the ability to make net additions to comparison goods floorspace. That said, this analysis does identify opportunities for specific / targeted improvements and it remains the case that some additions to existing provision could be achieved in the mid to higher order settlements (an example of this is the new Home Bargains store in Edenbridge). When considering such opportunities, a key aspect of ‘need’ will be meeting the needs of the main town centres in terms of protecting their health, particularly via maintaining existing provision (where it can contribute in a positive manner to the performance of the centre) and providing the right conditions for innovation in their retail offer.

Appendix I
Study Area

Appendix II
Quantitative Need Assessment

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