

DARTFORD & EBBSFLEET: RETAIL AND LEISURE STUDY

PART 1 STUDY

for:

DARTFORD
BOROUGH
COUNCIL
&
EBBSFLEET
DEVELOPMENT
CORPORATION

January 2021



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A handwritten signature in black ink, appearing to read "Steve Day". The signature is fluid and cursive, with the first name "Steve" and the last name "Day" clearly distinguishable.

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For and on behalf of Lambert Smith Hampton

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1. INTRODUCTION

- 1.1 Lambert Smith Hampton (LSH) was commissioned jointly by Dartford Borough Council ('DBC') and Ebbsfleet Development Corporation ('EDC') to prepare an updated **Retail and Leisure Study** ('RLS'). This two-part study provides the robust evidence base needed to inform the retail and leisure planning policies that form part of DBC's Local Plan Review. For EDC it will help to inform the planning and delivery of new sustainable centres as part of the wider regeneration of Ebbsfleet Garden City. The key findings of this study supersede previous evidence-based studies.
- 1.2 The study has been prepared in the context of current and emerging development plan policies and other key material considerations; principally the *National Planning Policy Framework* (NPPF) and the *National Planning Practice Guidance* (PPG). Both the Framework and PPG place significant weight on the development of positive plan-led visions and evidence-based strategies to help ensure the long-term vitality and viability of town centres.
- 1.3 By way of background, the Borough of Dartford is situated at the heart of the Thames Estuary in the north-west corner of Kent. The Borough benefits from an excellent strategic road and rail network, providing it with good access to Greater and Central London, Kent and the rest of the south east and the channel ports. In broad terms the Borough is characterised by two distinct geographic areas. To the north of the A2 it is mainly urban in character and comprises Dartford Town Centre, Stone, Swanscombe, Greenhithe, the Ebbsfleet area, and Bluewater regional shopping centre. To the south lies Metropolitan Green Belt, consisting of open countryside with 12 villages and a number of smaller hamlets. The villages mainly function as commuter settlements, with limited or no facilities. Longfield however has a relatively good choice of shops, services and other community facilities.
- 1.4 The key inter-related aims and objectives of this study are to:
- analyse the factors (technological, social and economic etc.) that will impact on the Borough's town centres over the period to 2036 and the key local planning policy and development opportunities that can help support sustainable retail and leisure provision;
 - assess the demand for retail and leisure space in the Borough, taking appropriate account of the wider regional draw of Bluewater, and provide an overview of the need for the main town centre uses in accordance with the NPPF;
 - audit the viability and vitality, market share, and effectiveness of planning policy and strategy, for Dartford town centre, Bluewater, and the six District Centres, to inform future strategy;
 - evaluate the capability of the Borough's evolving network of centres to function effectively and to meet future local needs;
 - assess and test the relationship between a range of local development growth scenarios and future retail and leisure provision;
 - formulate a positive development approach for Dartford Town Centre as a part of wider town centre strategy, including investigating the prospects, development options and strategy for its existing identified sites and purpose-built shopping locations; and
 - consider an appropriate and sustainable role for Bluewater in the future which would not result in significant impact on strategies for the regeneration of neighbouring town centres, bearing in mind its location in an area for growth and regeneration and its regional draw as a purpose-built regional centre.
- 1.5 This study is informed by desktop research, supplemented by new market research and data-gathering, including:

- A **telephone interview survey** of some 1,000 households conducted by NEMS Market Research (NEMS) across the Borough and wider geographic area in October/November 2019. This updates the previous household survey (also conducted by NEMS) in 2007 and provides robust evidence on current shopping patterns, expenditure flows and market shares within the defined study area (Appendix B).
 - A **street interview survey** conducted in Dartford Town Centre by NEMS in January/February 2020. This involved face-to-face interviews with over 500 people on different days of the week at different locations across the Town Centre (Appendix C).
 - A **pedestrian footfall survey** also conducted by NEMS at the same time as the street interview survey (Appendix D).
- 1.6 The study has also been informed, where feasible, by consultation and engagement with relevant key stakeholders, including neighbouring and wider local planning authorities (LPAs) to Dartford as part of the ‘*Duty to Co-operate*’ (‘DTC’). This incorporated written engagement with authorities over retail developments in their area, and a progress briefing (and question and answer) session for the authorities hosted by Dartford officers. This was programmed to enable formal representations to be made by Councils in their response to the Dartford Local Plan ‘preferred options’ public consultation. This consultation and engagement has provided a more informed understanding of the key issues, challenges and opportunities facing the Borough and its main centres. It has also helped to guide and shape the most robust and appropriate commercial, economic and sustainable retail and leisure strategy in response to the significant forces impacting on town centres both locally and nationally. This includes the growth of online shopping and the emerging impacts of the coronavirus pandemic (‘COVID19’) and “lockdown” which occurred during the preparation of this study.
- 1.7 It should be noted that at the time of preparing this study the Government issued a further series of reforms to the planning system in July 2020 related to Permitted Development Rights (PDR)¹ and the Use Classes Order (UCO)². This was followed by the consultation White Paper ‘*Planning for the Future*’ in August 2020, which sets out the Government’s proposed “radical reform” of the planning system. Although it is too early to comment on the potential implications of the White Paper on plan-making and development management at the local level, the amendments to the UCO are relevant to this study, and specifically the new Use Class E. We summarise the new UCO in more detail in Section 2 of this study.
- 1.8 For ease of reference this **Part 1** study is structured as follows:
- **Sections 2 and 3:** reviews the current/emerging planning policies and regeneration context relevant to DBC and EDC, along with national planning policy, guidance and other material considerations relevant to the preparation of this study.
 - **Section 4:** highlights some of the key trends that are driving the dynamic changes in the retail sector and town centres at the national and local level, and how this has shaped (and is likely to shape) the UK’s urban and retail landscape, including the initial impacts of COVID19.
 - **Section 5:** sets out a healthcheck of Dartford Town Centre based on a range of key performance indicators (KPIs).
 - **Section 6:** summarises and illustrates the headline findings of the street interview survey conducted in Dartford Town Centre.

¹ The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020/755; & The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 3) Order 2020/756

² The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21st July 2020 and amended the Town and Country Planning (Use Classes) Order 1987.

- **Section 7:** provides high-level health checks and audits for DBC's six main District Centres.
 - **Section 8:** provides an overview of Bluewater Shopping Centre's retail and leisure offer (existing and proposed) and its trading characteristics.
 - **Section 9:** defines the catchment (Study Area) and sub-zones (see Plan - Appendix A1) that provide the framework for the household telephone interview survey and summarises the headline results of the survey-derived market share analysis, including *Special Forms of Trading* (SFT)³.
 - **Section 10:** summarises the key inputs/outputs of LSH's **CREAT^e** economic retail capacity model. The detailed economic tabulations are set out in Appendix A2-A11.
 - **Section 11:** provides a robust quantitative and qualitative assessment of the potential "gaps" in the Borough's and specifically Dartford's leisure provision.
- 1.9 The **Part 2** study (i.e. Section 12) provides a summary of the key findings of the Part 1 study and sets out our policy recommendations to help inform plan-making and decision-taking in the Dartford Borough area and its main centres for new retail and commercial leisure uses.
- 1.10 It is important to state at the outset that capacity forecasts beyond a five-year (short-term) time period should be interpreted with caution. As we describe in Section 2, the NPPF is clear that LPAs should plan for and allocate sufficient sites to meet needs over the plan period (paragraph 23), but should apply a shorter ten-year time horizon to meeting the needs for new retail, leisure, office and other main town centre uses.
- 1.11 The PPG also acknowledges that, because of the uncertainty in forecasting long-term retail trends and consumer behaviour, forecasts "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"⁴.
- 1.12 We therefore advise that the forecasts be updated regularly to take into account, inter alia, the impact of any significant new retail and leisure developments in the Borough and neighbouring authorities; changes in population growth forecasts over time; and/or any significant impacts arising from other key trends in the retail and commercial leisure sectors. These trends will include, for example, the growing impact of ecommerce and the COVID-19 pandemic on the way people shop and carry out a range of leisure activities.

³ **Special Forms of Trading** (SFT): defined as all non-store retail sales (including sales via the internet, mail order, stalls and markets, door-to-door and telephone sales). On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS)

⁴ PPG. Paragraph: 004 Reference ID: 2b-004-20190722

2. DARTFORD: PLANNING & REGENERATION CONTEXT

- 2.1 This section provides a brief overview of the planning policy and regeneration context relevant to the preparation of this study. It first sets out a high level review of the *National Planning Policy Framework* (NPPF) and *Planning Practice Guidance* (PPG) pertaining to retail and town centre uses. It then covers the relevant policies and provisions of the Council's adopted and emerging Development Plan Documents ('DPDs') and other material considerations, principally the *Dartford Town Centre Framework*. Finally it summarises the key regeneration and development initiatives in Dartford Town Centre that have either been delivered over recent years, or are currently under construction or planned.
- 2.2 Section 3 provides a review of the planning and regeneration context for the *Ebbsfleet Development Corporation* ('EDC') area, which is located within Dartford Borough and extends into Gravesham Borough to the east.

ENSURING THE VITALITY OF TOWN CENTRES

National Planning Policy Framework (NPPF)

- 2.3 The latest update of the NPPF sets out the Government's planning policies for England. Planning law requires that applications for planning permission be determined in accordance with the development plan⁵, unless material considerations indicate otherwise⁶. The NPPF must therefore be taken into account in plan-making and is a material consideration in planning decisions.
- 2.4 The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, which is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs⁷. The Framework (paragraph 11) sets out the Government's view of what the presumption in favour of sustainable development means in practice. For **plan-making**: "...plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change" (paragraph 11a). For **decision-taking**, the onus is on local authorities to approve development proposals without delay where they accord with an up-to-date development plan. Where development plan policy is silent, or policies are out-of-date, permission should be granted unless there is a clear reason for refusal.
- 2.5 Chapter 3 ('*Plan-Making*') of the Framework provides guidance to local authorities on preparing local plans. Paragraph 20 states that policies should set out an overall strategy for the location, scale and quality of development. To achieve this they should make sufficient provision for: housing, employment, retail, leisure and other commercial development, alongside the provision of infrastructure and community facilities. The NPPF requires that LPAs plan for and allocate sufficient sites to meet needs over the plan period (paragraph 23), but apply **a shorter ten-year time horizon to meeting the needs for new retail, leisure, office and other main town centre uses**. In preparing development plans, "*policies should be underpinned by relevant and up-to-date evidence*" (paragraph 31). To ensure the local plans and spatial strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 33).

⁵ This includes local and neighbourhood plans that have been brought into force and any spatial development strategies produced by combined authorities or elected Mayors.

⁶ Section 38(6) of the Planning and Compulsory Purchase Act 2004 and section 70(2) of the Town and Country Planning Act 1990.

⁷ Resolution 42/187 of the United Nations General Assembly

- 2.6 Chapter 7 '**Ensuring the vitality of town centres**' provides guidance on plan-making and decision-taking for retail and other town centre uses that are most relevant to the preparation of this study. Paragraph 85 specifically sets out criteria that LPAs should consider when preparing planning policies.
- 2.7 Paragraphs 86-90 specifically set out the requirement to apply the sequential and impact tests to determine applications for new retail, leisure and main town centres that are neither in an existing centre, nor in accordance with an up-to-date development plan. The NPPF (paragraph 90) states that "...where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused".

Planning Practice Guidance (PPG)

- 2.8 The latest update of the **Planning Practice Guidance (PPG)** was issued in September 2020, at the time of finalising this study. It provides specific guidance on plan-making and decision taking for retail, leisure and town centre uses, including guidance on permitted development rights and the new Use Classes Order ('UCO') that came into effect on 1st September 2020 (see below). The Guidance supports the policies and provisions of the NPPF; placing significant weight on the development of positive plan-led visions and strategies for town centres.
- 2.9 In terms of planning for the vitality and viability of town centres, the PPG states that a wide range of complementary uses can, if suitably located, help to support the vitality of town centres, including residential, employment, office, commercial, leisure/entertainment, healthcare and educational development. Evening and night-time activities also have the potential to increase economic activity within town centres and provide additional employment opportunities.
- 2.10 The PPG (paragraph 004) sets out the importance of evidence-based strategies and visions for town centres to help establish their role and function over the plan period, the need for new retail, leisure and town centre uses, and other interventions. However, given the uncertainty in forecasting long-term retail trends and consumer behaviour, the PPG states that forecasts "**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**"⁸.
- 2.11 In those cases where development cannot be accommodated in town centres, the PPG requires planning authorities to plan positively to identify the most appropriate alternative strategy for meeting the identified need, having regard to the sequential and impact tests⁹. A checklist is provided for local planning authorities to consider when applying the sequential test¹⁰
- 2.12 The PPG also sets out several Key Performance Indicators (KPIs) that "*may be relevant in assessing the health of town centres, and planning for their future*"¹¹.
- 2.13 Guidance is also provided on Permitted Development Rights (PDR) and determining change of use applications in town centres¹². Aside from allowing changes of use without any application process,

⁸ Paragraph: 004 Reference ID: 2b-004-20190722

⁹ Paragraph: 005 Reference ID: 2b-005-20190722

¹⁰ Paragraph: 010 Reference ID: 2b-010-20190722.

¹¹ Paragraph: 006 Reference ID: 2b-006-20190722

¹² Paragraph: 007 Reference ID: 2b-007-20190722. Also refer to: Town and Country Planning (General Permitted Development) (England) Order 2015, as amended.

the PDR process allows for a change of use subject to prior approval by the local planning authority on specific planning matters.

Use Classes Order

- 2.14 As described in Section 1, the Government issued a series of reforms to the planning system in July 2020 at the time of finalising this study. The reforms principally related to Permitted Development Rights (PDR)¹³ and the Use Classes Order (UCO)¹⁴. They were also followed by the consultation White Paper ‘*Planning for the Future*’ published in August 2020.
- 2.15 The 2020 UCO, which came into effect from 1st September 2020 (and was subject to challenge at that time), amended and revoked a number of use classes under the previous 1987 UCO and replaced them with much broader use classes. These changes are relevant to this study which, in the main, refers to the previous use classes defined by the 1987 UCO. They are also material to the Council’s plan-making and decision-taking.
- 2.16 In brief, a new Class E subsumes use classes that were specified in the previous UCO as Class A1 (Shops), Class A2 (Financial and professional services), Class A3 (Restaurants and cafes) and Class B1 (Business). Class F1 and F2 include several the use classes that were previously specified in the Schedule to the Use Classes Order as Class D1 (Non-residential institutions) and Class D2 (Assembly and leisure).
- 2.17 The result of these changes is that what would previously be a change of use under the subsumed use classes is no longer considered development under the Planning Acts, and accordingly is no longer subject to planning control. In launching the reforms the Government announced that the regulations will give “...*greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant buildings*”¹⁵.

LOCAL PLANNING POLICY CONTEXT

- 2.18 The ‘Development Plan’¹⁶ forms the starting point for most decisions on planning applications. Documents produced for the Development Plan are known as ‘Local Plans’. For Dartford Borough these include the: Core Strategy (adopted September 2011) and Dartford Development Policies Plan (DDPP) (adopted 2017)¹⁷. The main local plan policies and provisions relevant to this study are summarised below.

Dartford Core Strategy (2011)

- 2.19 The Core Strategy (CS) provides the over-arching Local Plan for the Borough and was adopted by the Council in September 2011. It sets out the spatial strategy for the Borough covering the period 2006 to 2026.

¹³ The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020/755; & The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 3) Order 2020/756

¹⁴ The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020/757 was laid before Parliament on 21st July 2020 and amended the Town and Country Planning (Use Classes) Order 1987.

¹⁵ <https://www.gov.uk/government/news/pm-build-build-build>

¹⁶ Section 38(6) of the Planning and Compulsory Purchase Act

¹⁷ Also refer to Plans by Kent County Council on minerals and waste matters

2.20 The main policy covering Dartford Town Centre is **Policy CS2**, which sets out the need to revitalise the centre to help improve its range of attractions and environment to meet the needs of its growing population. The objective to create a new high quality Gateway into the town centre, with a new station facility and improved interchange was delivered in 2015. The policy also identifies the need for up to 24,000 sqm net of new retail floorspace by 2026¹⁸, the delivery of up to 1,030 homes and new employment. Three key town centre sites were identified for mixed-use development, namely: (i) Lowfield Street; (ii) Hythe St (former Co-op site); and, adjacent to that, the (iii) Kent Rd (former Westgate car park). Progress on the development of these sites is described in more detail below. The policy also encourages proposals for the refurbishment, extension or redevelopment of the Orchards and Priory Shopping Centres to provide enhanced and/or increased shopping and/or leisure facilities.

2.21 Other key policies relevant to this study include:

- **CS3 (Northern Gateway Strategic Site)** seeks to promote development to the north of the railway line and train station for a mix of uses and facilities, including new homes (over 2,000) and jobs (circa 1,200), local shops focussed around Mill Pond, and stronger connections to the town centre. This development, which is underway, will help to support the wider regeneration of the town centre.
- **CS4 (Ebbsfleet to Stone Priority Area) and CS5 (Ebbsfleet Valley)** cover the Ebbsfleet Development Corporation area which is a focus for major strategic development. This is described in more detail in Section 3.
- **CS10 (Housing Provision)** identified the potential in 2006 to 2026 for up to 17,300 new dwellings across the Borough allocated in accordance with the spatial strategy set out in CS1 (for example, up to 3,070 new homes are allocated to Dartford Town Centre, including the Northern Gateway Strategic Site). This a capacity-based figure set for regeneration purposes (in excess of local needs).
- **CS12 (Network of Shopping Centres)** outlines the following network of (existing and planned) complementary shopping centres that will act as the main foci for shopping and leisure activity: Dartford Town Centre (also refer to Policy CS2); Bluewater (refer to Policy CS4); the planned centres at Ebbsfleet/Eastern Quarry (refer to Policies CS4/CS5); and Longfield District Centre.

2.22 The strategy proposed for each of these existing and proposed shopping centres is based on the need to develop complementary but interrelated roles at the Borough level. There is a need to differentiate their range of services, so that they cater to different markets and competition between them is minimised. Whilst all the centres will be used by local residents, Ebbsfleet and Bluewater, in particular, will have a far wider catchment area. The table below is reproduced from the Core Strategy and sets out the specialist complementary role envisaged for each of the centres, to protect the role of designated town centres both within and outside Dartford Borough.

¹⁸ There is a forecast need for circa 15,000-19,000 sqm net of comparison goods floorspace and up to 5,000 sqm net of convenience goods by 2026.

Table 2.1: Role of shopping centres in Dartford Borough

	Function	Services Provided	Main Customer Draw	Implications for Change
Dartford Town Centre		Weekly convenience and comparison shopping; leisure; recreation; hotel(s); community; health; social care; and service facilities	District level population; town centre employees; sub-regional catchment for Orchard Theatre and associated facilities	Strengthening of market catchment share within immediate vicinity required to maintain centre at current level in hierarchy
Bluewater	Specialist regional comparison shopping centre (South East Plan)	Specialist comparison shopping; top-up convenience shopping; leisure; hotel	Regional level catchment; UK and international tourists linked to Ebbsfleet station	Bluewater will need to evolve to maintain its competitive position as a regional level centre
Ebbsfleet / Eastern	Supporting retail, leisure and service functions to serve resident and daytime population and to support its role as a regional hub (South East Plan)	Daily/weekly convenience and comparison and service needs of local residents; shops; hotel(s); services and leisure for business population (and international and domestic rail users at Ebbsfleet).	Local residents and workers (business and tourist rail travellers at Ebbsfleet)	Development of centres in Eastern Quarry, Ebbsfleet and Northfleet West Sub Station to serve local needs. Also a vibrant mix of uses to support the role of Ebbsfleet as a regional hub.
Longfield	District Centre	Daily/weekly convenience shopping and service facilities	Residents in Longfield and surrounding cluster of villages	Maintain viability of centre, with no loss of shopping provision.

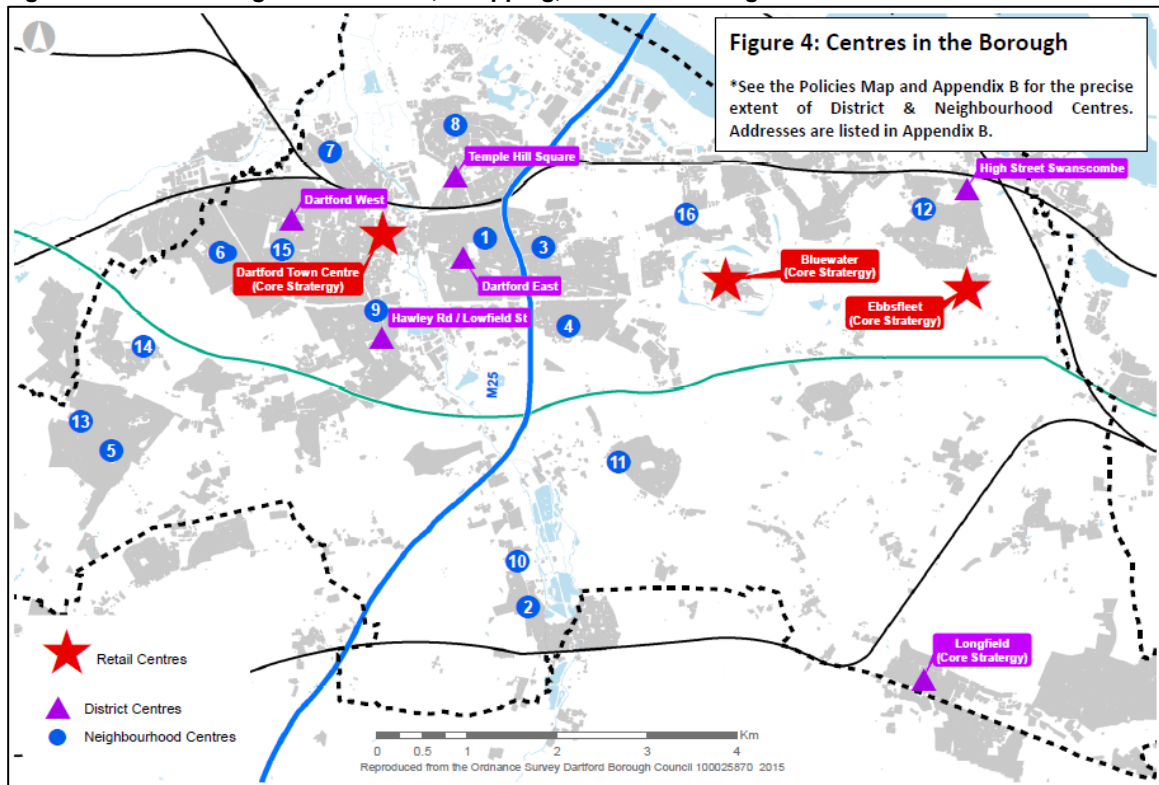
Source: Dartford Core Strategy. Table 3 (page 63).

Dartford Development Policies Plan (DDPP 2017)

- 2.23 The DDPP has been prepared in the context of the CS and provides the main planning policies for the Local Planning Authority (LPA)¹⁹ to assess and determine planning applications, alongside other material considerations. The DDPP builds on the spatial pattern of sustainable development identified in the Core Strategy in the Priority Areas of Dartford Town Centre (CS2), Northern Gateway (CS3), Ebbsfleet (CS5/CS5) and the Thames Waterfront (Policy CS1).
- 2.24 The DDPP's policies are framed by the presumption in favour of sustainable development (**Policy DP1**) and seek to: (i) develop in areas with the most regeneration potential; (ii) protect and enhance the quality of life; and (iii) ensure a balanced and sustainable pattern of land use and transport. Chapters 5-8 set out five cross-cutting policies that are potentially applicable to all planning applications across the Borough, including the area covered by the EDC. Chapters 9-15 cover other environmental, economic and social themes, with more detailed policies also shown on the Policies Map.
- 2.25 Chapter 12 (*'Dartford Town Centre and Shopping'*) sets out the policies (DP14-DP19) and provisions that are most relevant to the preparation of this study. In terms of the network of centres, the figure below (reproduced from the DDPP) shows the main centres in the Borough as identified by the Core Strategy (Policy CS12); namely Dartford Town Centre; Bluewater; Ebbsfleet/Eastern Quarry; and Longfield District Centre.

¹⁹ The phrase "Local Planning Authority" as used in the CS recognises that both Dartford Borough Council and the EDC will be applying the policies.

Figure 2.1: The Borough's Main Town, Shopping, District and Neighbourhood Centres



Source: Dartford Development Policies Plan (2017)

- 2.26 In addition to these, the network was extended to incorporate five additional District Centres: namely Dartford West; Dartford East; Temple Hill Square; High Street Swanscombe; and Hawley Road / Lowfield Street. A new tier of sixteen Neighbourhood Centres was also introduced (see Appendix B to the DDPP).
- 2.27 The DDPP identifies the impact of the economic downturn, the dynamic changes in the retail sector and the slowdown in residential development on the anticipated town centre regeneration identified by the CS. Although there has been some growth in other leisure and town centre uses since the CS was adopted, specifically cafés and restaurants, the DDPP also highlights the fact that retail floorspace has been contracting in the Borough. The position in relation to planning applications at Bluewater is also confirmed. As a result, the CS's retail policies, alongside others, are the focus of the Local Plan review (see below).
- 2.28 The table below summarises the key policies and provisions relating to the planning, assessment and determination of retail and town centre uses across the Borough and its main centres. The extent of the **Town Centre Boundary** is shown in the figure below (reproduced from the DDPP), along with defined **Primary Shopping Frontage (PSF)** and **Secondary Shopping Frontage (SSF)** (refer to Policies DP15 and DP16). It also shows the Key Sites identified by the CS (Diagram 3) for new development and regeneration.

Figure 2.2: Dartford Town Centre Boundary, Frontages and Key Sites

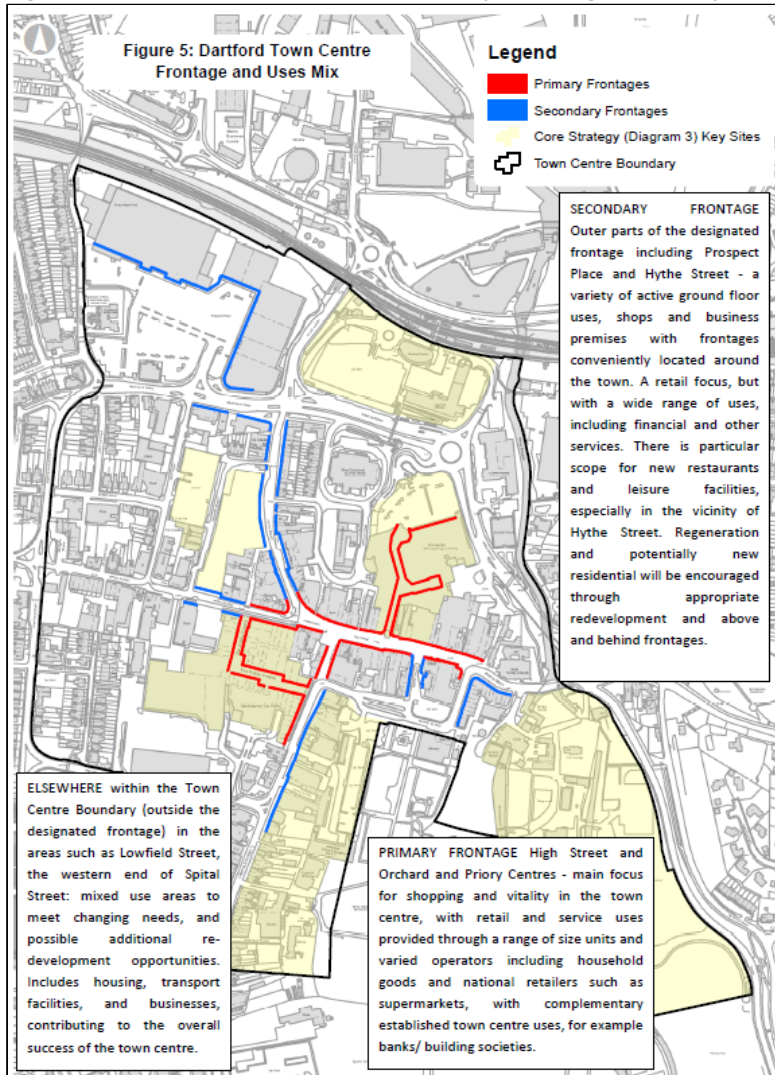


Table 2.2: Dartford Development Policies Plan – Dartford town centre and shopping policies

POLICY	SUMMARY
DP14 - Retail and Town Centre Development:	Sets out the (sequential and impact) policies relating to the assessment of new retail and town centre floorspace applications that are proposed outside the network of defined centres (see above). DP14(4) defines a local impact threshold of 500 sqm. DP 14(5) states that for the defined centres, at ground floor level, a shop unit of suitable operational size for a range of occupiers should normally be maintained at the front of the premises, with a window display retained where possible. Full use should be made of upper floors in developments.
DP15 - Dartford Town Centre and its Primary Frontages:	Supports the revitalisation of the Town Centre in line with the CS (Policy CS2) and provides weight to “transformational” redevelopment proposals that meet the objectives of the CS. The second part of DP15 prioritises the defined Primary Shopping Frontage (PSF) for Class A1/A2 purposes. Changes of use to Class A3/A4, will be permitted (in line with Policy DP14(5)) and where one of the following criteria are met: (a) adjacent shops in the frontage (on either side) are both in A1/ A2 use; or (b) the shop has been shown to not be feasible for A1/ A2 use after sufficient effective marketing, and is vacant. The marketing criterion identified under DP15(2b) can be triggered if significant issues of vacancy arise. The “sufficient effective marketing” required in this Plan means continuous proactive marketing as defined in the Glossary (DDPP, Appendix C) [refer to Note 1 below].
DP16 - Dartford Town Centre’s Secondary Areas:	Supports Class A1-A4 uses outside of the designated PSF. Under DP16(1) other main town centre uses (as defined by the NPPF) and other non-residential institutions (D1) will be considered with respect to their contribution to the vitality and viability of the town centre and taking full account of five key criteria (a-e), including the need to: to retain a predominance of A1-A4 uses and the ability of the proposal to maintain a shop-front. Where they satisfy the criteria residential uses will also be permissible through appropriate redevelopment primarily above and behind frontages. For non-designated Town Centre frontages, DP16(2) states that a more diverse offer of main town centre uses as well as non-residential institutions will be supported, subject to demonstrating: (a) a contribution to improving the vitality and viability of the town centre, including through marketing evidence; (b) that the proposal would not result in a concentration of any one non-retail or leisure use; (c) compliance with other Local Plan policies. Residential uses will be encouraged as part of a wider mix of active uses, subject to promoting active street frontages and a variety of uses at street level.
DP17 - District Centres:	Sets out the policies that seek to main the important role, function and offer of the Borough’s six District Centres. These centres are identified as having an important role meeting the more frequent shopping, service, health and other needs of their local communities, and benefitting from good access by different modes of travel. Their offer is usually anchored by a supermarket or larger superstore. DP17(1) states that Class A (shop) and Class D1 (community) will be permitted, unless: (a) the proposed development would result in less than 50% of the units in the Centre being retained within Class A1/ A2 use; or (b) a Class A5 use is proposed not in accordance with Policy DP19. DP17(2) states that applications for all other ground floor changes of use will only be permitted in line with DP14(5) or where the unit is vacant and has been demonstrated to be not viable for shop and community use through sufficient effective marketing.
DP18 - Neighbourhood Centres:	Seeks to maintain the shops and essential services for local residents in the 16 defined Neighbourhood Centres. These smaller/medium sized centres provide day-to-day shops of benefit to nearby residents within walkable distance. They are characterised by some Class A1/A2 shops (normally smaller convenience shops) complemented in the more sizeable neighbourhood centres by other shops. Policy seeks to ensure the retention of Class A1/A2 uses, including services such as post offices, funeral directors, dry cleaners, sandwich bars, estate agents and banks. Policy states that each Neighbourhood Centre should retain at least two Class A1/A2 retail units within its choice of varied facilities. DP18 states that ground floor changes of use in Neighbourhood Centres will be permitted where two or more Class A1/A2 unit(s) are to be retained within the Centre, proposals satisfy DP19, and: (a) the prospective use is non-residential and not already provided within the centre, and satisfies DP14:5; or (b) the unit is vacant and has been demonstrated to be not viable for retail uses through sufficient effective marketing.
DP19 - Food and Drink Establishments:	Sets out criteria to address potential adverse impacts of food and drink uses on the locality and general wellbeing, including residential amenity. DP19(2) also seeks to prevent the inappropriate location or clustering of Class A5 takeaway premises.

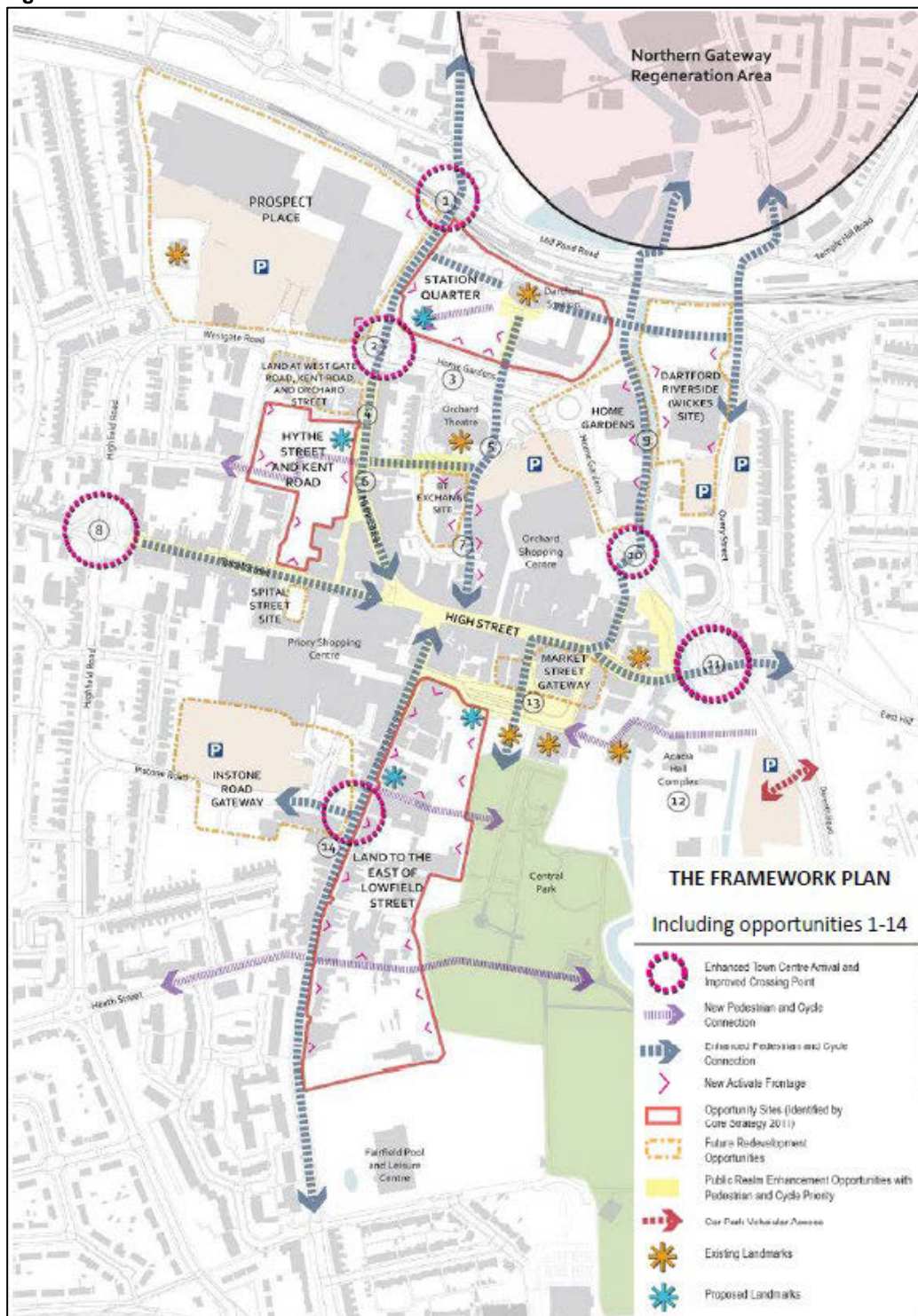
[1] The Glossary states that to be sufficient for the purposes of this plan “*effective marketing*,” means effective continuous proactive marketing for an appropriate period, but not Marketing exceeding 12 months, using a professional agent and an appropriate range of online, on site and other advertising media. The asking price should, throughout the 12 month period, be shown to be reasonable for the property and location, and to reflect the market value of the uses currently required under policy. In District and Neighbourhood Centres if the latest AMR indicates the relevant centre has a vacancy level exceeding 10%, then a sufficient effective marketing period of 6 months or more would be acceptable.

2.29 As the DDPP states, “*the pivotal factor is that there remains no shortage of identified land in the town centre to meet needs in future years, providing investors with choice and flexibility, and scope for major transformation responding to significant household growth in and around the town centre*” (paragraph 12.30).

Dartford Town Centre Framework SPD (2018)

2.30 The *Dartford Town Centre Framework Supplementary Planning Document* (SPD) was adopted in July 2018. It provides guidance on the built form, routes and movement, land uses and design principles, and plans for specific development sites. The Framework is a “weighty” consideration when deciding planning applications. Development proposals for the town centre must clearly show how they contribute to objectives and the design principles and other requirements within this document. The key initiatives and development opportunities identified by the Framework to help transform Dartford Town Centre are set out in the figure below.

Figure 2.3: The Framework Plan



- 2.31 The progress and delivery of these key regeneration opportunities and initiatives is described in detail below and throughout this study.

New Local Plan

- 2.32 Dartford is updating its Local Plan, refreshing and bringing together 2011 Core Strategy and 2017 Plan, to help guide planning applications and Dartford's regeneration well into the 2030s. This study forms part of the important evidence base that will help to inform and shape the Council's plan-making and decision-taking. The Council issued a *Strategic Issues Consultation* document in June 2018 to ascertain the views of the Borough's residents, businesses and organisations on the 'Big Issues' that should be addressed in the local planning strategy. This represented the first consultation on the new Local Plan. Following feedback, a *Preferred Options* ('Regulation 18') consultation was held in January and February 2020, setting out emerging proposals alongside alternative approaches. Section D sets out the preferred approach to Dartford Town Centre and retailing across the Borough, to be informed by the findings of this study. Following this, submission of the plan to the Secretary of State is expected in 2021, with adoption occurring in 2021 or 2022.

DARTFORD TOWN CENTRE - REGENERATION & DEVELOPMENT CONTEXT

- 2.33 Since the adoption of the Core Strategy in 2011 and the more recent Dartford Town Centre Framework SPD in 2018, there has been good progress on several key investment, development and regeneration initiatives by both the Council and private sector. The following provides an overview of some of the more significant projects that have either been delivered or are planned for the town centre.

Market Street (aka Brewery Square) / High Street

- 2.34 Dartford Borough Council is in the process of delivering public realm and highway improvements across the town centre. Phase 1 comprises the improvements to Market Street in the heart of the Town Centre to provide an attractive pedestrian-friendly public space that links the high street with Central Park (see figure below). The new public space will be known as Brewery Square to reflect the history of brewing in this part of the town centre.

Figure 2.4: Brewery Square



Source: Dartford Borough Council

- 2.35 The new square will be bounded by the Acacia Mansion House, Carnegie Library and Museum, the new Brewery Quarter of the Lowfield Street development (see below) and entrances to One Bell Corner and the High Street. The square will also include three new "pocket-parks" in the form of raised grassed platforms with natural planting and trees. When completed in 2021 the scheme will help to reduce traffic congestion in the area by relocating the 'Iceland' short stay car park to the Acacia Hall grounds, behind the Dartford library, and providing a simplified road layout.
- 2.36 The Council's town centre public realm regeneration phased improvement works will also cover the High Street (Phase 2) and Hythe Street (Phase 3). In brief the Council's aim is create a more

pedestrian-friendly environment, by providing new high quality public realm through narrowed traffic lanes, wide footways and new (green) plantings.

Central Park / Acacia Estate

- 2.37 Central Park provides a 26-acre green space in the heart of the Town Centre and is neighboured by the Acacia Estate, with pedestrian links to Market Street and Lowfield Street (see below). The River Darent flows through the park before joining with the River Thames some two miles downstream. At the time of preparing this study the Acacia Hall/Central Park Restoration Project led by the Council, the Environment Agency and South East Rivers Trust are restoring the River Darent back into the heart of Central Park/Acacia Hall resulting in improved water quality, benefits to local wildlife and helping to reconnect park users and the town centre with the river.
- 2.38 Alongside these improvements to the park and Market Street, the £5 million transformation of the 19th century Acacia Hall and redevelopment of other parts of the estate are currently underway, following planning permission in 2018. A direct pedestrian access to the new Brewery Square is being created. The Grade II listed property's ballroom, boiler house, squash court, garage, dance studio, maintenance room office, staff facilities, public toilets, tennis courts and playground will all be demolished as part of the upgrade. The car park will be extended to provide an additional 130 spaces and two vehicular bridges and new access routes will be provided to Market Street and Darenth Road for two-way traffic.

Lowfield Street (including Copperhouse Green)

- 2.39 The Lowfield Street site was previously earmarked for a new Tesco superstore, but following Tesco's sale of the site in 2015 planning permission was secured in September 2017 (planning reference: 16/01919/FUL and later amended by various consents) for the phased development of the site to provide some 556 new dwellings. All phases are now underway. Phase 1 will deliver the refurbishment of 26 Lowfield Street and the construction of 188 dwellings and provision of 1712m² of retail/ commercial floor space which will include provision for retail units, office space and a café/micro-brewery. Phase 2 and 3A include the delivery of 280 residential dwellings and will be known as Copperhouse Green. We understand that apartments are being marketed, with prices ranging from circa £188,000 to £320,000. Phase 3B, which at this point in time is the final permitted stage, consists of 88 units with a mix of private rented and affordable housing units. Additionally, there may be potential for a fourth phase but there are no applications yet submitted. Beyond these, directly to the South is the former Vauxhall Farm which has permission (subject to a legal agreement) for 92 residential units.

Fairfield Leisure Centre

- 2.40 The Council has invested a reported £12m in the upgrade of the Fairfield Leisure Centre to provide a new refurbished swimming pool, sauna, multi-sports hall, gym and café. The centre reopened in February 2016 and has since benefitted from a further circa £270,000 investment in the gym and indoor cycling studio. There have also been upgrades to the "wet and dry" changing facilities and provision of more private changing cubicles. This new investment has resulted in a significant increase in memberships and trips to the leisure centre, with monthly visits reportedly over 40,000.

Northern Gateway Regeneration Area

- 2.41 The Northern Gateway Regeneration Area (NGRA) lies north of the Town Centre. The Dartford Core Strategy 2011 identifies the NGRA as having the potential to accommodate up to 2,040 residential units and between 2,500-5,000 sqm of flexible retail/ commercial space. At the time of preparing this

study most of the residential units and commercial floorspace had been consented, was under construction or completed.

2.42 The Council consented an outline application for Mill Pond and Northern Gateway East in 2011 which included between 950-1,050 homes and between 2,500-5,000 sqm of non-residential floorspace. The Mill Pond site extends to 7.6 acres and gained approval for 400 residential units (nearing completion) and 2,582 sqm of non-residential in 2015(ref: 15/00625/REM) This includes the recent award winning major residential development known as Langley Square, all of which is now indicated as sold or reserved. In 2019 400 sqm of A1 retail floorspace and 400 sqm of D2 leisure were completed. The Northern Gateway East site including 'Phoenix Quarter', with 451 residential units, is also now complete.

2.43 In addition to these two key sites within the NGRA further consents and completions have taken place, including:

- 28,728 sqm for B1/B8 floorspace completed within the Capacity B Park (17/01793/FUL and 15/01271/REM);
- Completion of phase 1 of The Base Business Park near the railway station, with a further 6,922 sqm of B1/B2/B8 floorspace currently under construction (17/01477/FUL);
- Completion of Matrix Business Park (13/01127/FUL);
- A 2-form entry primary school currently under construction to be called River Mill primary school; and
- Large new residential communities in the Lawson Road area, and a number of smaller residential schemes.

Hythe Street (Westgate Dartford)

2.44 This cleared site extends to 1.32ha in the heart of the town centre and is bordered by Spital Street to the south, Kent Road to the west and Hythe Street to the east. The site is allocated for redevelopment within the Dartford Core Strategy (2011) as a town centre development site (sites 2 and 3) for mixed-use development, and the 2018 Framework SPD (2018) designates the site as a key town centre opportunity site.

2.45 The Council and Homes England are joint landowners and they signed a development agreement with Muse Developments Ltd in 2018 to take forward the circa £100m investment in, and regeneration of the town's Westgate area. A full planning application was approved (subject to a legal agreement) in late 2020 (planning reference: 20/00409/FUL) for the comprehensive mixed use development of the site. The table below sets out the proposed mix and scale of uses allowed.

Table 2.3: Proposed area schedule

Use	Gross Internal Area (GIA) sqm	Units / Description
Residential units	10,519	120 units – 40 one-bed and 80 two-bed units, including 20 affordable units.
Flexible commercial	2,682	Nine units
Health and Wellbeing	2,686	
Cinema	2,792	Multi-screen
Hotel (retaining Co-op façade)	3,000	85 rooms
Car Park	6,428	239-space over 5 levels, of which 120 spaces will be for residents. Also 206 cycle spaces.
TOTAL:	28,107	

Source: Westgate Dartford. Planning Statement (March 2020). Table 5.1.

Please note that the reforms to the UCO have resulted in changes to the uses classes identified above (for example, Class A1-A3 and B1 uses are now part of the new Class E, and cinemas have moved from Class D2 to sui generis)

- 2.46 The vision is to create a vibrant cultural and leisure quarter with strong linkages to the successful Orchard Theatre. The proposed multiscreen cinema will create a focal point for the development, with active frontage at the head of the new public square. The cinema will be arranged over two levels and across two buildings split apart by the proposed pedestrian route from Kent Road. A range of flexible uses are also proposed to ensure the long term viability of the development. At the time of finalising this study developer contributions and other legal matters need to be confirmed in a section 106 legal agreement, and other issues resolved (including finding a health and wellbeing occupier) before the development can commence. Notwithstanding this, we understand the landowners remain committed to bringing forward a major mixed use town centre development at the earliest opportunity.

SUMMARY

- 2.47 In summary national and local planning policy and guidance seeks to ensure the vitality and viability of town centres through new investment, development and regeneration, framed by robust evidence-based strategies and visions.
- 2.48 In the case of Dartford Borough, the adopted and emerging Development Plans and the 2018 Dartford Town Centre Framework SPD all promote the revitalisation and regeneration of Dartford Town Centre as a priority. Specific sites and areas in and around the town centre have been identified which will help to deliver a wide range of uses, a substantial new residential community and a marked transformation in the attractiveness of Dartford town centre through the provision of new places and green spaces.

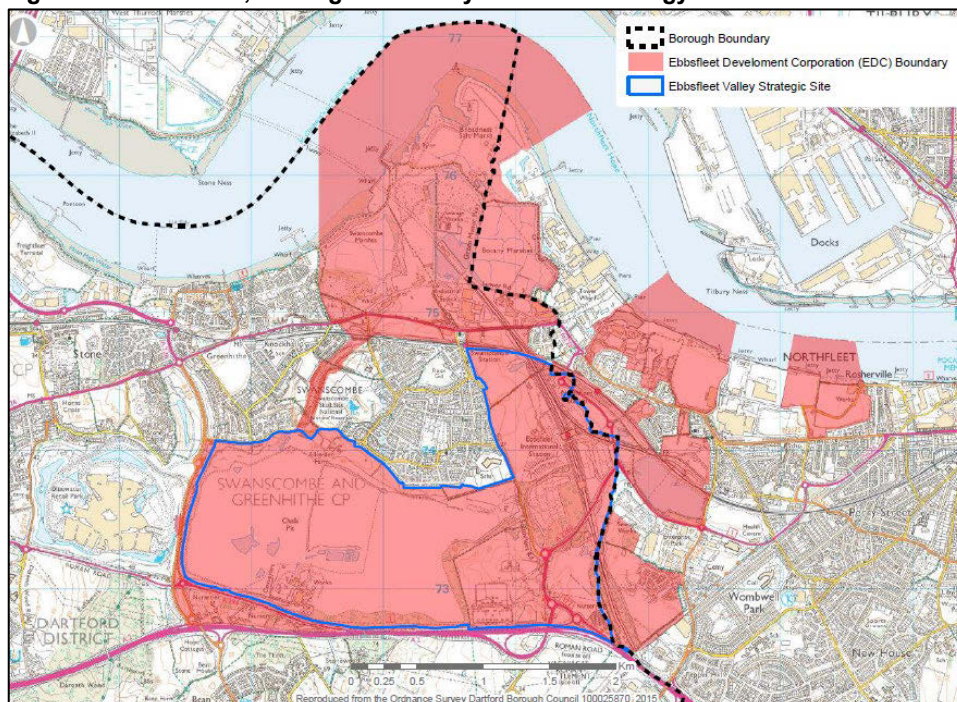
3. EBBSFLEET: PLANNING & REGENERATION CONTEXT

- 3.1 The development of Ebbsfleet is an important economic driver for Dartford Borough. It will comprise a new Garden City and urban hub focussed around Ebbsfleet International Station (EIS), which provides connections to Central London (circa 17 minutes travel time) and Paris (circa two hours). It is planned that the area will accommodate significant new homes, employment, retail, leisure and wider community uses.
- 3.2 This section provides an overview of the key investment, regeneration and development projects planned for Ebbsfleet at the time of preparing this study.

EBBSFLEET DEVELOPMENT CORPORATION (EDC) & PLANNING POLICY CONTEXT

- 3.3 The vision for major residential mixed use development at Ebbsfleet is centred on the major International Railway Station ('IRS') and dates back over more than two decades to the 1995 *Thames Gateway Planning Framework* (RPG9a). This was followed by a series of planning documents, including the *'Kent Thameside Vision Looking to the Future'* (1995: Kent Thameside Association), which provided an informal comprehensive planning framework for the area; and the Government's *Sustainable Communities Plan* (2003) that identified the Ebbsfleet area as the location for 10,000 new homes, 5.5 million square feet of commercial space and two million square feet of retail, leisure, community and supporting space.
- 3.4 Although permissions were granted, only a small amount of development, principally housing, had been delivered by 2015 due in part to the impact of the recession and the impact of complex and costly land assembly and infrastructure on development viability, alongside a lack of co-ordination. As a result the *Ebbsfleet Development Corporation* (EDC) was established in April 2015 by Central Government to take lead responsibility for development in the northeast of the Borough. The EDC area is shown in red in the figure below.

Figure 3.1: EDC Area, Borough Boundary and Core Strategy Site Allocation



Source: Dartford Development Policies Plan 2017

- 3.5 The EDC was established with the direct involvement of Dartford, Gravesham and Kent Councils to deliver up to 15,000 new homes, significant new jobs and other infrastructure and developments. The EDC has a critical role to play in achieving large-scale regeneration, which is expected to take the form of the country's first new *Garden City* for over 100 years. The Garden City principles here involve connecting Ebbsfleet's 'blue' waterscapes and 'green' landscapes to “bring the garden into all areas of the city”. A network of seven landmark 'city' parks are planned: including 'Ebbsfleet Central Park' in the heart of Ebbsfleet's new centre which will help to reconnect Swanscombe to Ebbsfleet's eastern neighbourhoods. It should also be noted that land north east of the station extending into Gravesham, at Northfleet Rise, was awarded Enterprise Zone status to help foster redevelopment of the site for business purposes. This land, in common with much of that around the station, functions and generates revenue as a car park for station commuters.
- 3.6 The EDC boundary extends across Dartford and Gravesham local authority areas. Although EDC is responsible for determining planning applications in the relevant part of Dartford Borough, this does not extend to producing Local Plans or other statutory planning policy. The adopted DPDs for both Dartford and Gravesham Borough Councils therefore apply in the EDC part of the Boroughs. The relevant policies in the adopted Dartford Core Strategy (2011) and Gravesham Core Strategy (2014) that cover the EDC area were highlighted in Section 2 and are summarised below.

Table 3.1: Dartford and Gravesham Core Strategies – Key Policies

DARTFORD BOROUGH COUNCIL:					
Area	Policy	New Homes	Jobs / Employment Space	Shops and Leisure	Services and Facilities
Ebbsfleet to Stone Priority Area	CS4	Up to 7,850, plus a further provision post 2026	9,700 jobs, plus further provision post 2026	Up to 23,000 sqm net of shopping floorspace, with any further floorspace at Bluewater subject to regional considerations	Secondary school and up to 5 primary schools. GP surgeries. Fastrack route through sites.
Ebbsfleet Valley Strategic Site (within the Ebbsfleet to Stone Priority Area)	CS5	up to 5,250, plus further provision post 2026. (As part of the 7,850 homes at Ebbsfleet to Stone Priority Area)	9,500 jobs	Up to 18,000 sqm net of shopping floorspace	One secondary school. Up to 4 primary schools. GP surgeries. Fastrack route through sites.
Thames Waterfront Priority Area	CS6	Up to 3,750 homes, plus further provision post 2026.	11,800 jobs	Local shopping provision. Riverside leisure uses not competing with town centres.	2 primary schools (under review). GP surgery.
GRAVESHAM BOROUGH COUNCIL					
Area	Policy	New Homes	Jobs / Employment Space	Shops and Leisure	Services and Facilities
Northfleet Embankment and Swanscombe Peninsula East Opportunity Area	CS03	980 homes	133,500 sqm employment space		
Ebbsfleet (Gravesham)	CS06	690 homes	20,000 sqm employment space		

Source: Ebbsfleet Implementation Framework (2017), EDC. Page 20.

- 3.7 Both Dartford and Gravesham Boroughs are in the process of preparing new local plans. Both these documents will form part of the development plan for the respective Boroughs once adopted.

EBBSFLEET IMPLEMENTATION FRAMEWORK

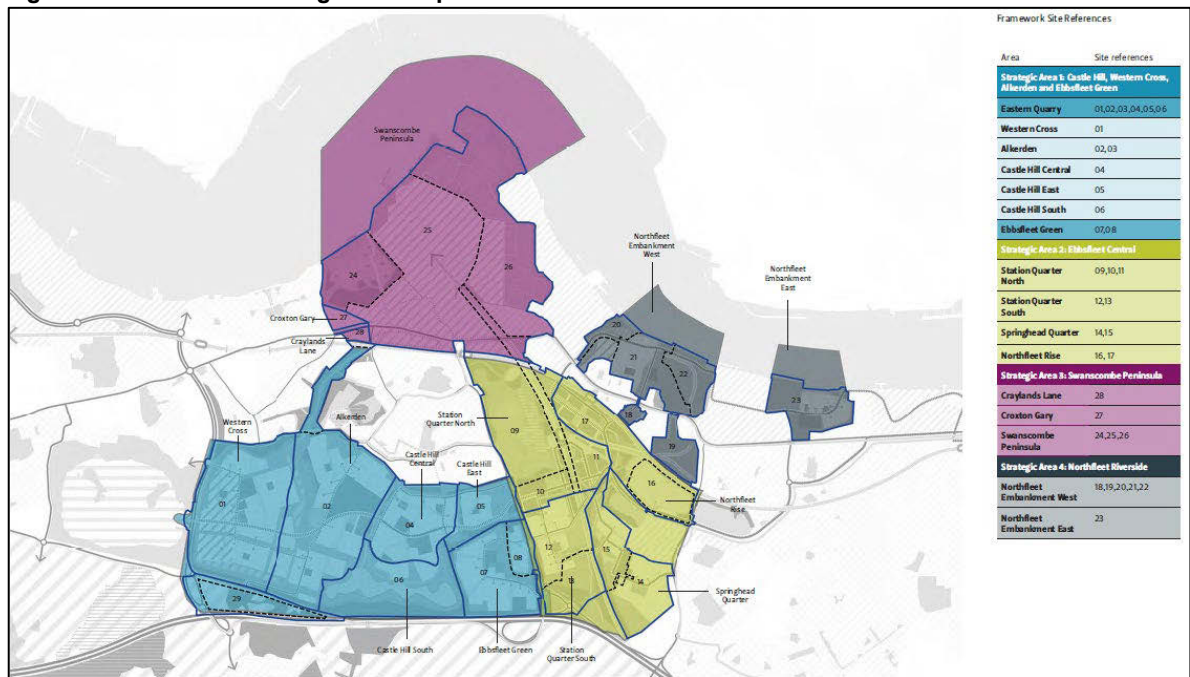
- 3.8 The *Ebbsfleet Implementation Framework* ('EIF') was published in 2017. It is a non-statutory document that sets out EDC's vision and the spatial framework for achieving a Garden City at Ebbsfleet, whilst still operating within the Dartford and Gravesham Local Plans. The key ambitions and targets that underpin the EIF include the delivery of:

- 12,842 new homes and a forecast population of approximately 27,709;
- 13 FE of primary school provision and 8 FE of secondary school provision, with potential for a further 6FE of secondary education in Ebbsfleet Central;

- 82 hectares of employment and commercial land;
- 564,480 sqm of commercial space and 70,310 sqm of retail floorspace; and
- up to 30,000 new jobs.

3.9 This Spatial Framework sets out a joined-up approach to development. It brings together the various existing and emerging development consents to ensure that development potential is maximised across four distinct **Strategic Development Areas** ('SDA'). The SDAs are shown in the figure below:

Figure 3.2: Ebbsfleet Strategic Development Areas



Source: Ebbsfleet Implementation Framework (2017). EDC. Page 87.

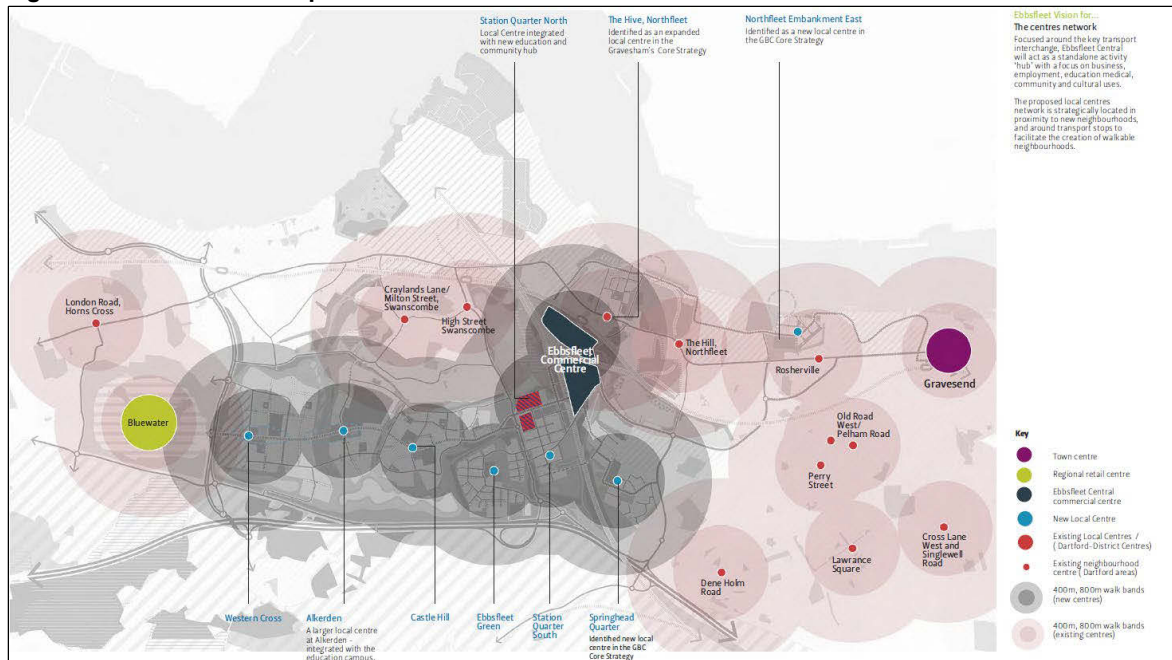
3.10 Of relevance to this study, a network of local centres are planned across the four SDAs to ensure the resident population has access to everyday shops and services within a short walking distance of circa 5-10 minutes. The Framework states that these new centres will provide facilities and services for new and existing communities, whilst reinforcing and protecting the role and function of the existing network of centres, particularly Dartford and Gravesham town centres. EDC will work with developers and local partners to establish:

- Ebbsfleet Central around the International Station as the major centre; and
- up to ten new local centres located within Eastern Quarry (Castle Hill, Alkerden and Western Cross/Ashmere), Ebbsfleet Green, Springhead Quarter and Northfleet Embankment East.

3.11 The plan below shows the proposed location of these centres.

3.12 The centres will range in size and function. Larger centres (such as Alkerden Centre and Station Quarter North) will seek to provide the critical mass required to attract commercial uses and services that meet the needs of residents. Both of these centres will also be closely integrated with proposals for strategic education, health, community and leisure uses, such as the education campus within Alkerden at the heart of Eastern Quarry, including an 8-form entry Secondary School and a 2 form-entry Primary School; a library and community sports provision. Smaller local centres will also be sited within walkable distances of new homes and will provide for residents' everyday requirements.

Figure 3.3: Ebbsfleet – Proposed New Centres



Source: Ebbsfleet Implementation Framework (2017). EDC. Page 73.

3.13 The following provides a more detailed description of the four main SDAs.

Ebbsfleet Central

3.14 This is the “*heart of Ebbsfleet*”. It runs along the Ebbsfleet River Valley and is dominated by Ebbsfleet International Station (EIS) which forms the focus for new development and regeneration opportunities. Much of the area currently comprises extensive surface car parking and rail infrastructure. Development within this area has to take into account the key planning policies in the respective Core Strategies adopted for Dartford and Gravesham Borough Councils, and extant planning permissions. The policies in the Dartford Core Strategy (Policies CS4/CS5) cover Station Quarter North and South, Eastern Quarry and Ebbsfleet Green (see Section 2). Policy CS06 of the Gravesham Core Strategy (2014) covers the Springhead and Northfleet Rise areas.

3.15 The EDC’s ambition for Ebbsfleet Central is to create an “*urban heart*” for the Ebbsfleet that is complementary to the offer provided at Dartford and Gravesend town centres and Bluewater Regional Shopping Centre. A major commercial hub is envisaged supported by a diverse mix of residential, educational and leisure uses, with associated bars, restaurants and convenience shopping.

3.16 Existing development proposals for Ebbsfleet Central include outline consented quarter masterplans, and a limited number of reserved matters/detailed applications. Land in and around EIS was granted flexible outlet consent in November 2002 for a maximum of 789,550 sqm of development, comprising:

- 3,384 new dwellings;
- 455,000 sqm of offices (B1);
- 147,000 sqm of commercial retail and leisure space (A1-A5, C1 and D2); and
- 21,500 sqm of social/community infrastructure (ref: DA/96/00047 and GR/96/0035).

- 3.17 There is also the need to provide some 5,500 station parking spaces (up to 9,000 in total) within multi-level parking structures to free up development land. In addition, four new local centres are planned as follows:

Table 3.2: Ebbsfleet Central – planned new centres and retail (Class A1) floorspace

Area	Outline Consent Reference:	Uses
Station Quarter North (Dartford Borough):	DA/08/00577	12,000 sqm of retail, along with substantial new office and hotel floorspace focussed around the station. It is proposed that the centre at Station Quarter North will be of a size and critical mass required to attract commercial uses and services that meet the needs of residents, as well as being closely integrated to a new strategic education and community hub. Consent not implemented.
Station Quarter South (Dartford Borough):	DA/06/01045	up to 3,500 sqm of new retail and 3,000 sqm of leisure/entertainment uses. Consent not implemented.
Springhead Quarter (Gravesham Borough):	GR/96/0035	500 sqm of new retail and 500 sqm of leisure uses. This consent has since been implemented.
Northfleet Rise (Gravesham Borough):	GR/96/0035	up to 2,400 sqm of retail and up to 2,000 sqm of leisure uses. Consent not implemented.

- 3.18 Aside from Springhead Quarter where the planning permission has been implemented, we understand that the other outline consents are timed to expire in 2022. Notwithstanding this, both EDC and DBC continue to support the vision of the Garden City style development next to the transport interchange. The updated floorspace schedule provided to LSH by EDC/DBC during the preparation of this study shows the planned development of 10,781 sqm of Class A1 retail between 2025 and 2036 within Dartford Borough²⁰.
- 3.19 EDC acquired Ebbsfleet Central in October 2019 and has commissioned a Masterplan to secure a new outline planning permission for mixed use development of the site. The Masterplan will follow the principles outlined in the EDC Implementation Framework and plan for a ‘centre’ for Ebbsfleet with higher density development. At the time of finalising this study the application is likely to be submitted in 2021.

Eastern Quarry

- 3.20 Eastern Quarry is a former chalk quarry and area of brownfield land that extends to approximately 270 hectares. The site is bounded to the south by the A2, the B255 and Bluewater to the west, and Alkerden Lane and the settlements of Greenhithe, Knockhall and Swanscombe to the north. The eastern edge of the site, bounded by Southfleet Road, is approximately 500m from Ebbsfleet International railway station.
- 3.21 The site is broadly split into three character areas currently known as: (i) Castle Hill (to East of site); (ii) Alkerden broadly in the centre of the site; and (iii) Western Cross/Ashmere at the western end of the site adjacent to Bluewater. Ebbsfleet Green is a gateway site to the north of the A2(T) and includes the decommissioned Northfleet West Grid Sub-Station. The latter site is currently being brought forward by Redrow for residential led development.
- 3.22 Eastern Quarry is identified in Dartford’s adopted Core Strategy Policy CS4 as falling within the Ebbsfleet to Stone Priority Area as a Key Development Site and as a strategic development site within the Ebbsfleet Valley as identified in Policy CS5. Existing development proposals across Eastern Quarry and Ebbsfleet Green include outline consented area masterplans and more recent

²⁰ The total permitted Class A1 floorspace is 12,536 sqm gross. EDC have calculated for the purpose of this study that approximately 86% of this retail floorspace is in Dartford Borough, with the remaining 14% located in Gravesend Borough.

reserved matters/detailed applications. Outline planning consent for Eastern Quarry was granted in November 2007 (ref: DA/03/01134/OUT)²¹ for up to 6,250 dwellings, no less than 33% (89 hectares) of the site as open space and the following new gross floorspace:

- 120,000 sqm - Class B1 business/office;
- 26,000 sqm - Class A1-A5 retail (of which floorspace in Class A1 will not exceed 16,900 sqm)
- 24,000 sqm - Class D2 leisure / 11,000 sqm – Class C1 hotel; and
- 50,000 sqm - education, community, social facilities and other uses (Class C2/C2a and D1).

3.23 The outline permission sets a structured approach to the consideration of planning matters as phases come forward over time. A subsequent S73 planning application was granted consent in 2013 which changed the disposition of development to the east of the site from employment to residential use with open space. This site is subject to development.

3.24 Eastern Quarry can be divided into a number of distinct but inter-related character areas that are at various stages of planning and development. The following village centres are planned to serve new neighbourhoods and located along the transport spine:

Table 3.3: Eastern Quarry – planned new centres and proposed Class A retail floorspace

Area	Uses
Eastern Village - Castle Hill:	Located at eastern end of EQ. Residents are living within the phases 1, 2 and 3 consented scheme and a Primary School has opened. When complete Castle Hill will consist of around 1,600 dwellings together with a village centre. The outline permission allowed for up to 2,500 sqm of new Class A1-A5 floorspace; 2,000 sqm of leisure uses; 2,000 sqm of offices (B1) and 9,000 sqm of new social/ community infrastructure, which includes the new Primary School (ref: DA/14/00584/EQCHC). The recent reserved matters permission (ref: EDC/17/0067) which is now being delivered on site allows for 911 sqm of Class A1-A5 floorspace and the potential occupants identified by EDC include a small foodstore, café, pharmacy, dentist and estate agent.
Central Village - Alkerden:	This will be the largest centre in EQ and it has to have the critical mass needed to attract commercial uses and services that meet the needs of residents, as well as being closely integrated with a new education campus. The original outline permission (ref: 12/01451/EQVAR) was revised by the more recent outline permission (ref: EDC/17/0048), which identifies a likely floorspace of up to 50,000 sqm. This will include new retail (Class A1-A5), hotel (C1), leisure (D2), community (D1/D2), offices (B1) and residential (C3) uses. EDC has indicated that the non-residential floorspace proposed as part of this outline consent will be up to 7,960 sqm (GIA) and will comprise 3,950 sqm of new retail, cafés and restaurants (A3); a 1,800 sqm supermarket ; a 1,230sqm community centre; and 980 sqm clubhouse.
Ebbsfleet Green:	Original outline permission (ref: DA/05/00308/OUT) for a new local centre to comprise 1,259 sqm of new Class A1-A5 floorspace, 5,000 sqm of new hotel space and 1,758 sqm for social/ community infrastructure. Following a series of applications the following have been delivered: 1,083 sqm office for Redrow opened in 2019 (ref: EDC/16/0071); 104-bed hotel (C1) opened in 2018 (ref: EDC/16/0117); 734 sqm pub/restaurant (A3/A4) opened in 2018 (ref: EDC/16/0118); and 339 sqm Co-op convenience store (A1) (ref: EDC/16/0083).
Western Village – Ashmere (including Western Cross):	The outline permission (ref: 12/01451/EQVAR) allows for a local centre of up to 2,500 sqm of Class A1 retail, 2,000 sqm of leisure (D2), 80,000 sqm of office space (B1) and 9,000 sqm of social/community infrastructure. The scale and mix of uses was subsequently refined (e.g. EDC/16/0094) to allow for circa 3,000 residential units and up to 3,000 sqm for undefined commercial (Class A/B/D) uses .

Sources: Various. Update provided by EDC for the purpose of the preparation of this study in 2020.

3.25 It is recognised that the scale and mix of uses proposed for the Eastern Quarry scheme will require a long build-out programme and the masterplans will require a degree of in-built flexibility to be able to respond to changes in the retail and commercial markets over time. Furthermore, although the floorspace for non-residential use is much lower than the maximum quantum set out in the original outline consent, the Ashmere centre will benefit from its location on the Fastrack route and will have direct links to Alkerden, which will serve as the community and commercial heart of the whole of

²¹ Subject of a S106 legal agreement dated 13th November 2007, which has subsequently been amended by two Deeds of Variations relating to transport contributions (17th August 2012) and affordable housing (11th August 2014).

Eastern Quarry, and the regional shopping centre of Bluewater. Although the scale of commercial uses planned for Ashmere mean that it will not function as a retail destination in its own right, it should be able to support local services to meet the needs of its local residents. The anticipated floor area and land use is therefore considered appropriate²².

Swanscombe Peninsula / London Resort

- 3.26 The peninsula lies north of Swanscombe town, adjoining the River Thames. It stretches between Ingress Park and Northfleet and comprises predominantly low-lying land, natural habitats and marsh used for agriculture and grazing, as well as riverfront industrial activities. Swanscombe Peninsula West is covered by Policy CS6 of Dartford's Core Strategy (2011) as an area of potential development within the broader Waterfront Priority area. Specifically, the policy requires development to share local facilities with Ingress Park, to preserve the ecology of the Peninsula and support residential, employment and outdoor leisure uses. The eastern edge of Swanscombe Peninsula is covered by Policy CS03 of the Gravesham Core Strategy (2014) and is located within *Northfleet Embankment and Swanscombe Peninsula East Opportunity Area* which sets out a substantial opportunity for major riverside regeneration in Gravesham.
- 3.27 There are emerging proposals for an international scale '**London Resort**' Theme Park/Leisure Scheme at Swanscombe Peninsula on the south bank of the River Thames and with supporting transport and visitor reception facilities on the northern side of the river. The EIF identifies that this development could serve diverse and growing markets for leisure and holidays, conferences, entertainments and the creative arts, and could be a major focus for investment and regeneration in the area. Despite delays in the project over the years, the application was submitted to the Planning Inspectorate on 31st December 2020.
- 3.28 The application site covers approximately 504 hectares of land and is located on the south side of the Thames on the Swanscombe Peninsula. It includes a corridor for transport connections extending generally southwards to the A2(T) trunk road. On the northern side of the river the site includes areas of land east of the A1089 Ferry Road and proposed car parking at the Tilbury Ferry Terminal, with the potential for improved and new ferry passenger services direct to London Resort.
- 3.29 The masterplan is reproduced below.
- 3.30 In summary, the '**Principal Development**'²³ includes the 'Leisure Core', which will comprise a range of entertainment experiences in a series of themed zones, incorporating events spaces, themed rides and attractions, entertainment venues, cinema and theatres. These will be developed on the Swanscombe Peninsula in two phases, referred to as 'Gate One' (57ha) and 'Gate Two' (25ha), with each phase subdivided into themed zones. Retail and amenity facilities, including a range of restaurants, cafes and coffee shops linked to the Resort experience, will be integrated into Gates One and Two. The Gates may also incorporate some of the Resort's proposed hotel accommodation (see below).

²² Sourced from application by Countryside Clarion (Eastern Quarry) LLP seeking approval for a combined area masterplan (AMP) and area design code (ADC), parking management plan (PMP), junction design modelling and air quality report pursuant to conditions 19, 20 and 21 of the outline planning permission for Eastern Quarry (EQ). Refer to paragraph 7.15 of Dartford Borough Council's decision notice.

²³ In the description of development the applicant makes a distinction between the 'Principal Development', which comprises all works proposed within what would be the Entertainment Resort, and 'Associated Development', comprising other development that has a direct relationship with the 'Principal Development' and is required to support its construction or operation. 'Associated development' is also defined within Annex A of the Department for Communities and Local Government *Guidance on associated development applications for major infrastructure projects* (April 2013)

Figure 3.4: Illustrative Masterplan – The London Resort



3.31 The applicant is also seeking permission for ‘**Associated Development**’ on a (8ha) site outside of Gates One and Two for up to 26,000 sqm of ancillary retail, dining and entertainment floorspace and supporting attractions (but excluding hotels). The wider development will also comprise:

- four **hotels** providing family, upmarket, luxury and themed accommodation totalling up to 3,550 suites or ‘keys’;
- a ‘**Conferention**’ **Centre** (i.e. combined conference and convention) with a floor area of up to 11,000 sqm and 3,000 seats, capable of hosting a wide range of entertainment, sporting, exhibition and business events;
- a linked building hosting a range of eSports, video and computer gaming events, with a total floorspace of up to 16,500 sqm;
- a ‘Back of House’ area accommodating many of the necessary supporting technical and logistical operations to enable the Entertainment Resort to function;
- car parks with an overall volume of 10,750 spaces; and
- river transport infrastructure on both sides of the Thames, including floating jetty and ferry terminals and the repair or replacement of White’s Jetty..

3.32 The London Resort is “*designed to cater for up to 6.5 million visitors per year with Gate 1 open only, and up to 12.5 million visitors per year with Gates 1 and 2 in operation. It will be a destination with a global profile, with up to 12% of visitors projected to come from overseas*”.

3.33 The development will follow the *Nationally Significant Infrastructure Projects* (NSIP) consent process and will therefore be determined by the Planning Inspectorate. The process of determining NSIP applications takes, on average, 15 months. On this basis, a decision could be expected no earlier than March 2022.

SUMMARY

- 3.34 Although there has been significant progress made in delivering new residential development in the EDC area over recent years, there is still uncertainty as to much of the exact scale and mix of commercial, employment and community uses that will be developed out as part of Ebbsfleet Central and Eastern Quarry.
- 3.35 There is also particular uncertainty at the present surrounding the proposals for a London Resort Theme Park at Swanscombe Peninsula.
- 3.36 Notwithstanding these "unknowns", it is necessary for this study to make an informed assessment of the likely quantum of committed retail (convenience and comparison goods) floorspace that could be delivered over the forecast period to meet the needs of the significant population growth. The tables below summarise the most up-to-date schedules detailing the committed retail floorspace for the new centres planned for Ebbsfleet Central and Eastern Quarry based on information provided by EDC and DBC.

Table 3.4: Ebbsfleet Central: Total estimated new retail floorspace, phasing and mix

	TOTAL PLANNED RETAIL FLOORSPACE (1) (gross sqm)	TOTAL PLANNED RETAIL FLOORSPACE IN DARTFORD BOROUGH ONLY (2) (gross sqm)	COMPARISON/CONVENIENCE RETAIL FLOORSPACE (3)		COMPARISON/CONVENIENCE RETAIL FLOORSPACE (4)	
			Comparison (gross sqm)	Convenience (gross sqm)	Comparison (net sqm)	Convenience (net sqm)
ASSUMED PHASING OF NEW FLOORSPACE (1):						
2025-2031	5,901	5,075	1,522	3,552	1,142	2,487
2031-2035	5,373	4,621	3,235	1,386	2,426	970
2035-2036	1,262	1,085	543	543	407	380
TOTAL NEW CLASS A1 RETAIL:	12,536	10,781	5,300	5,481	3,975	3,837

Source: At the time of preparing this study EDC and DBC indicated that up to 12,536 sqm of Class A1 retail could be implemented at Ebbsfleet Central (July 2020). A proportion of this new floorspace will be developed in Gravesend Borough and the figures have been adjusted to reflected DBC development only, based on EDC input.

Notes: (1) Development of this new floorspace would be phased between 2025-2036. The 5-year phasing floorspace schedule shown was provided by EDC/DBC and confirmed at a meeting in February 2020.

(2) EDC (July 2020) have calculated that approximately 86% of the total retail floorspace will be within the Dartford Borough area, with the residual 14% in Gravesend Borough. For the purpose of this assessment we have applied this ratio to the assumed phasing of the new permitted/planned floorspace up to 2036.

(3) LSH have necessarily made informed judgements as to the likely split of the Class A1 floorspace between convenience (food) and comparison (non-food). We have made the reasonable assumption in the first 5 years of phased development that the proposed floorspace will mainly accommodate convenience goods retailing. This could take the form of a foodstore anchor and supplementary convenience retailing (e.g. butcher, baker, newsagents, convenience stores, greengrocers, etc.) to serve the needs of the resident population and other visitors to the International Station, etc. It is assumed that 70% of the gross floorspace developed out between 2025-2030 will be convenience goods retailing. For 2031-2035 we have assumed a higher proportion (70%) of the new floorspace will be for comparison goods retailing, and in 2035-2036 we assume that the new Class A1 retail floorspace proposed will be equally split between convenience and comparison goods retailing (50:50).

(4) LSH have assumed a gross/net floorspace conversion ratio for comparison goods floorspace of 75%, and 70% for convenience goods space.

Table 3.5: Eastern Quarry: Total estimated new retail floorspace and mix

	TOTAL PLANNED RETAIL FLOORSPACE (gross sqm)	TOTAL ESTIMATED RETAIL FLOORSPACE (gross sqm)	COMPARISON/CONVENIENCE RETAIL FLOORSPACE		COMPARISON/CONVENIENCE RETAIL FLOORSPACE ⁽⁴⁾	
			Comparison (gross sqm)	Convenience (gross sqm)	Comparison (net sqm)	Convenience (net sqm)
EASTERN VILLAGE - CASTLE HILL (1)						
TOTAL FLOORSPACE:	911	575	151	424	113	297
CENTRAL VILLAGE - ALKERDEN (2)						
TOTAL FLOORSPACE:	5,750	3,775	1,975	1,800	1,481	1,260
WESTERN VILLAGE - WESTERN CROSS/ASHMERE (3)						
TOTAL FLOORSPACE:	3,000	1,200	360	840	270	588
TOTAL NEW FLOORSPACE:	9,661	5,550	2,486	3,064	1,864	2,145

Source: EDC and DBC (2020).

Notes: ⁽¹⁾ **Eastern Village** - The recent reserved matters permission (ref: EDC/17/0067) now being delivered allows for 911 sqm of Class A1-A5 floorspace and the potential occupants identified by EDC include a small foodstore, café, pharmacy, dentist and estate agent. Based on the area schedules permitted LSH has assumed the floorspace of the convenience store (unit 1) will be up to 424 sqm (Gross External Area), which is equivalent to 297 sqm net based on a gross/net ratio of 70%. It is also assumed that Unit 2, which extends to 151 sqm GEA could potentially accommodate new comparison goods retailing.

⁽²⁾ **Central Village (Alkerden)** - EDC has indicated that the non-residential floorspace planned as part of outline consent EDC/17/0048 will be up to 7,960 sqm (GIA) and will comprise 3,950 sqm of Class A1 and A3 floorspace; a 1,800 sqm Class A1 supermarket; a 1,230sqm community centre; and 980 sqm clubhouse. For the purpose of this assessment we have assumed that 50% (1,975 sqm) of the 3,950 sqm of permitted Class A1/A3 will accommodate Class A1 retail, along with the 1,800 Class A1 supermarket.

⁽³⁾ **Western Village** - EDC has indicated that the updated planning position for Western Village allows up to 25,000 sqm of residential (circa 3,000 units) and up to 3,000 sqm for undefined commercial uses falling with Use Classes A, B and D. For the purpose of this assessment LSH has assumed that approximately 40% of this floorspace will accommodate retail uses. It is assumed that retail will be split equally between convenience and comparison goods floorspace.

⁽⁴⁾ The net sales area of the gross retail floorspace has been derived by applying a 75% gross/net conversion ratio for comparison goods floorspace and 70% for convenience goods.

- 3.37 For Ebbsfleet Central the total expected retail floorspace is 12,536 sqm gross. Of this total floorspace EDC estimate that some 10,781 sqm gross will be provided in Dartford Borough, with the residual in Gravesend Borough.
- 3.38 EDC/DBC has provided a breakdown of the likely phasing up to 2036. LSH has then applied informed judgements as to the likely split between convenience/comparison goods floorspace, and the retail sales areas based on the application of reasonable gross/net floorspace ratios.
- 3.39 A similar assessment has been carried out for Eastern Quarry (EQ). EDC has identified the planned Class A floorspace summarised in Table 3.5. LSH has applied reasonable judgements as to what proportion of this floorspace could be developed out for retail (convenience and comparison) uses.
- 3.40 These floorspace schedules had been agreed with EDC and DBC at the time of finalising this study and inform the retail capacity assessment set out in Section 10. However, as stated above, the scale and mix of uses proposed will involve a long build-out programme in some cases and a degree of flexibility will need to be applied to respond to changes in market demand and trends over time.

4. RETAIL AND TOWN CENTRE TRENDS

- 4.1 This section summarises some of the key economic, consumer and property market trends that have driven the changes in the retail and leisure sectors over the last decade, and which will continue to shape change in the future. It also briefly examines whether and how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability in the future. It should be noted at the outset that this was written during the height of the coronavirus pandemic ('COVID-19' or 'COVID-19') in 2020, including the series of lockdowns and "social distancing" measures implemented by the Government.

ECONOMIC OUTLOOK

- 4.2 In the 18-24 months prior to the COVID-19 pandemic the UK economy had been characterised by a low growth trajectory. The *Office for National Statistics* (ONS) identified that the UK's GDP increased by +0.3% (quarter-on-quarter) in the third quarter (Q3) of 2019. This represented a +1% year-on-year increase since 2018 (Q3), which was the weakest growth recorded since 2010 (Q1).
- 4.3 The impact of the COVID-19 pandemic has seen the UK economy experience its biggest annual decline in GDP (-9.9%) for over 300 years. The latest ONS figures show the economy narrowly avoided a double-dip recession in 2020, with growth of +1% in the final quarter. Looser COVID-19 restrictions in the run-up to Christmas resulted in a +1.2% growth in December, after a -2.3% fall in November during 'Lockdown 2.0'. This far exceeded the damage caused by the 2008 financial crisis.
- 4.4 Britain's budget deficit (i.e. the gap between public spending and income from taxes) has also reached the highest levels experienced since the second world war. Government borrowing climbed to a record £240.9 billion in the first eight months of 2020, and the Office for Budget Responsibility (OBR) forecast that this could reach almost £400 billion by the end of March 2021.
- 4.5 Experian Business Strategies (Experian) predict in their latest *Retail Planner Briefing Note* ('RPBN') that the economy will not recover to pre-pandemic levels until at least 2022. This is based on Experian's assumptions that the economy will return to some "normality" from mid-2021 due to the roll-out of vaccines. However, the unprecedented nature of the global pandemic means that all forecasts are subject to greater than usual uncertainty and volatility.

RETAIL SPENDING

- 4.6 The COVID-19 pandemic has inevitably had a dramatic impact on retail spending and sales in 2020.
- 4.7 Although consumer spending has been a key driver of economic growth since the BREXIT referendum in June 2016, there had been increasing signs pre COVID-19 that growth was starting to "soften". Figures show that household spending slowed to an eight year low (+1.2%) in 2019 due principally to the impact of BREXIT on consumer confidence.
- 4.8 The latest figures show that household spending fell by over 20% quarter-on-quarter in the second quarter of 2020; the largest quarterly contraction on record. Spending on hospitality, travel and leisure was dramatically impacted during this period. Retail also suffered as businesses were forced to close; although this was partly cushioned by an increase in food and online purchases.
- 4.9 The latest Experian²⁴ forecasts for **retail spend per head** show:

²⁴ Experian Retail Planner Briefing Note 18 (October 2020). Figures 1a and 1b

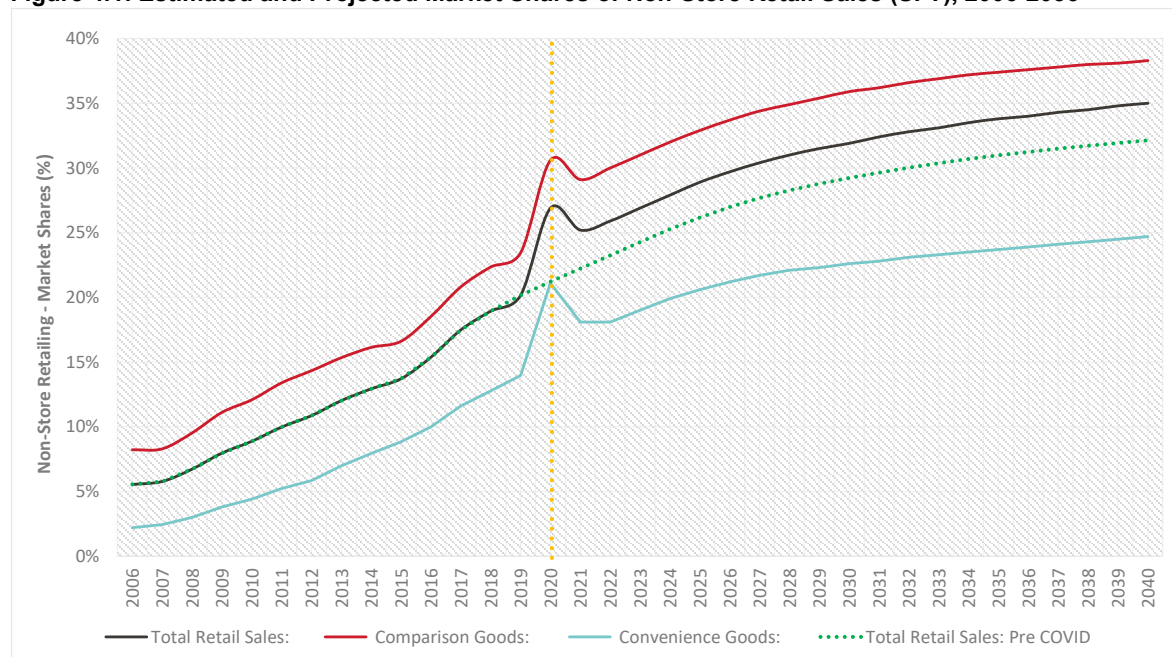
- **Convenience goods:** The impact of COVID-19 resulted in a significant +8.4% surge in spend per head in 2020 according to Experian. This followed negative growth in 2019 (-0.9%) and for most years since 2005. As we describe below, the negative growth in convenience goods spending over the last 15 years has had a significant impact on the grocery sector and on retailer business models. Experian predict that the boost to convenience goods spending in 2020 will start to “unwind” in 2021 assuming a return to more “normal” conditions. Experian forecast a fall in convenience spend in 2021 (-6.2%), and annual (per capita) growth over the medium to long term “flatlining” at around +0.1% up to 2040.
 - For **comparison goods** the figure shows year-on-year growth rates recovering from a low of -1.0% in 2009, to a high of +5.7% in 2015. Following negative growth of -8.5% in 2020, Experian predict that (per capita) growth will settle at around +3% per annum on average up to 2040. This growth forecast is significantly below the historic long term trend (1997-2019) of +5.5% per annum.
- 4.10 Following a dramatic -53.8% fall in **leisure spend** per head in 2020, Experian forecast a return to growth in 2021 (+64.7%) and 2022 (+14.8%). Average yearly growth is then forecast to settle at approximately +2.5% over the period 2023-2027 and +0.9% over the long term (between 2028-2040). This growth in leisure spend is consistent with the historic average growth of +1.1% per annum recorded between 2012 and 2018, and higher than long term trend (1997-2019) of -0.6% per annum.
- 4.11 These expenditure growth trends and forecasts have informed the assessments of retail capacity in Section 10 and leisure needs in Section 11. Clearly any further dampening of growth rates over the short to medium term due to the on-going impact of the pandemic will have implications for the viability of existing retail and leisure businesses and the take-up of new space, as well as the potential residual expenditure capacity available to support new businesses and floorspace.

THE RISE OF ONLINE SHOPPING

- 4.12 The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour, and the retail sector over the last decade. Non-store retailing, which principally comprises internet shopping, is commonly referred to as *Special Forms of Trading* (SFT)²⁵,
- 4.13 ONS figures show that the value of non-store retail sales (including the internet) stood at £84.2bn in 2019 (in 2016 prices). This represented a significant growth from £17.1bn in 2006.
- 4.14 As the figure below shows, SFT’s overall market share (as a proportion of total UK retail sales) increased from 5.5% in 2006 to 20.2% in 2019. In other words online accounted for more than one in every five pounds spent on retail goods in 2019. Of this total non-store retail sales, Experian estimate that comparison and convenience goods retailing achieved market shares of 23.4% and 14.1% respectively.
- 4.15 The impact of COVID-19 has been to increase the market share of non-store retail sales following the series of lockdowns. Experian’s latest figures indicate that the total non-store market share increased to 26.9% in 2020; and the share of comparison and convenience goods retailing increased to 30.6% and 21.1% respectively. This compares with Experian’s previous forecasts (pre COVID-19) of 21.2% for all total retail sales, 24.5% for comparison retailing and 14.9% for convenience.

²⁵ **Special Forms of Trading** (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

Figure 4.1: Estimated and Projected Market Shares of Non-Store Retail Sales (SFT), 2006-2036



Source: Experian Retail Planner Briefing Note 18 (October 2020). Appendix 3

- 4.16 The latest Experian forecasts indicate that total SFT market shares will increase to 34% by 2036 (i.e. over one in every three pounds spent on retail in 15/16 years' time will be online). Comparison and convenience goods non-store retail sales are forecast to reach 37.6% and 23.9% respectively by 2036.
- 4.17 Experian predict that the pace of e-commerce growth will slow over the long term as internet use is now almost at capacity. ONS statistics show that some 91% of all UK adults have internet access and almost all of those aged between 16-44 years in 2018. Hence, growth of the internet user base will be less of a driver than it has been in the past decade according to Experian. Instead, generational differences in internet use will increasingly drive growth. For example, the 'Millennials' (defined as anyone born between 1981 and 1996) and 'Generation Z' (anyone born between 1997 and 2010) generations have been born into digital environments and use technology more intensively. These groups will account for half of the adult population by the end of the 2020s (compared to 39% in 2019) and the bulk of retail spending. Their preference for online shopping could well represent the "tipping point" for the retail industry as a whole²⁶. As a result high streets, town centres and physical retailers will need to work even harder to attract and retain these generational groups as customers.
- 4.18 However other research²⁷, published before the impact of the pandemic, predicted that the growth in online sales could be even faster than forecast by Experian; accounting for a substantial 53% of total retail sales by 2028. This faster growth it is argued will be driven by the significant improvements in the convenience and choice of online purchasing through further advances in smartphones, mobile/wearable technology and Artificial Intelligence (AI), alongside improved web-based platforms and social media. The expansion of 5G and fibre networks, cheaper and faster deliveries (including the potential for drone deliveries, autonomous delivery vehicles, etc.), more 'click-and-collect' options and easier return processes will also provide the platform for increasing online purchases.

²⁶ 'The Digital Tipping Point – 2019 Retail Report' (Retail Economics and Womble Bond Dickinson)

²⁷ 'The Digital Tipping Point – 2019 Retail Report' (Retail Economics and Womble Bond Dickinson)

- 4.19 When it comes to forecasting the potential capacity for new physical retail floorspace, Experian estimate that approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional (*'bricks-and-mortar'*) retail space, rather than through *'virtual'* stores and/or *'dot com'* distribution warehouses. On this basis, Experian has adjusted their SFT market shares downwards to reflect their estimates of the proportion of internet sales sourced from existing stores. As a result the SFT market share of total retail sales is reduced to 16.6% in 2020, 18.6% by 2025, 21% by 2030 and 22.7% by 2036. These market shares are higher than Experian's pre-COVID forecasts of 13.6% in 2020, increasing to 21% by 2036. In line with standard approaches these adjusted/recalibrated market share figures are preferred for retail capacity assessments.
- 4.20 Notwithstanding this, it is clear that the *"digital revolution"* and growth of online retailing has and will continue to have a significant impact on Britain's retailers, sales and high streets. The early impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV and GAME stores across the UK). However this does not mean that other comparison goods categories are immune to the impact of the internet. For example, there has been an increase in online fashion 'stores' and purchases over the last decade. These trends are clearly illustrated by the survey-derived SFT/internet market shares for different categories of comparison goods expenditure (see Section 9).
- 4.21 The impact of the *"digital revolution"* is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand through say Netflix or Amazon Prime, and through new recently launched channels by Apple and Disney. Social media, Skype, Zoom, etc. are also displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a *'digital divide'* between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that serve the day-to-day needs of their local (high street) communities. Yet the success of businesses at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.
- 4.22 In summary, both retailers and high streets will need to compete for shoppers and expenditure through a variety of means including creating experiences that will attract the interest and attention of potential consumers across all age and socio-economic groupings. We comment later in this section on the emerging trend in convergence between physical and online retailing.

RETAILER BUSINESS MODELS AND REQUIREMENTS

- 4.23 The challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. This has created significant challenges for traditional *"bricks-and-mortar"* retailing and the high street. Consequently national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 4.24 These dynamic trends are best illustrated by the grocery sector over the last decade. Following a sustained period of growth over circa 25 years up to 2010, principally driven by new larger format store openings in predominantly edge and out of centre locations, the business models for the top-5 main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) have shifted

dramatically. Today their focus is on growing market share through online sales and new smaller convenience store formats (including Tesco Express, Sainsbury's Local and Little Waitrose). As a consequence, applications for large store formats have slowed to a virtual standstill over the last decade and extant permissions have not been implemented. Outside of the so-called top-5 grocers, the 'deep discount'²⁸ food operators (namely Aldi and Lidl) have significantly increased their respective market shares through new store openings. Notwithstanding this the grocery and convenience sector has been one of the biggest "winners" during the COVID-19 pandemic and "lockdown", with more people having to work at home and shop locally at essential stores, including local independents.

- 4.25 The non-food retail sector has also experienced a significant impact from the rise of online shopping, the challenging economic and property market environment. Many well-known retailers have either closed over the last decade or have had to significantly reduce their store portfolios. The table below summarises some of the higher profile "casualties" since 2008.
- 4.26 Although 2019 was generally regarded as one of the hardest for the retail sector in generations, this had been surpassed in 2020 due to the impact of the COVID-19 pandemic and "lockdown". Research shows that more bricks-and-mortar retailers had gone into administration by the end of June 2020, than in the whole of 2019.
- 4.27 It is apparent that COVID-19 and "lockdown" has accelerated the potential demise of a number of high profile retailers that were already struggling due to falling sales and increasing costs, including Debenhams, Oasis, Warehouse, Laura Ashley and Kath Kidston. The impacts are being felt by cities, towns and shopping locations across the UK. including Dartford Town Centre and Bluewater. For example, Bon Marche closed in Dartford in 2020. Bluewater lost Jaeger in 2017, Currys PC World in 2019 and Oasis, Warehouse and Kath Kidston in 2020. Other retailers that are currently in administration or have closed their stores include Victoria's Secret and Aldo (both in Bluewater) and New Look (in Dartford Town Centre).
- 4.28 It is apparent that national retailers with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment. The higher costs of trading from high streets compared with online and out-of-centre retailing, also means that it is not a "level playing field". This is a further contributing factor to the significant number of store closures that have occurred over recent years.
- 4.29 Research shows that in total there was a net closure of some 7,550 retail units across Great Britain in 2019. Some analysts indicate that there was as much as 30% too much physical space in the retail sector pre COVID-19 and this is likely to be higher due to the impact of COVID-19. Recent forecasts by the *Centre for Retail Research* (CRR) suggest that some 20,000 shops could close in 2020, impacting on up to 250,000 jobs across the UK. The increase in long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of investment confidence in town centres, which in turn "pushes" more people to shop online.

²⁸ Also referred to as 'Limited Assortment Discounter' ('LADs') by the Competition Commission Report.

Table 4.1: The Largest Retailers that have gone in Administration since 2008

Year	Retailer	Stores	Employees	Sector
2020	M&Co	262	2,700	Clothing
	DW Sports	75	1,700	sportswear
	Benson Beds	242	1,900	Furniture
	Harveys Furniiture	20	240	Furniture
	TM Lewin	65	600	Clothing
	Le Pain Quotidien	10	200	food and beverage
	Monsoon Accessories	35	550	Fashion & accessories
	Oasis & Warehouse	92	2,300	Clothing
	Kath Kidston	60	900	Fashion & accessories
	Brighthouse	240	2,700	Household goods
	Laura Ashley	155	2,350	Clothing
	Oddbins	56	567	off licences
	Hawkins Bazaar	22	177	toys & games
Beales	22	n/a	Department Store	
2019	Select	180	2,000	clothing
	Debenhams	165	25,000	Department Store
	Clinton Cards	332	2,500	cards, gifts
	New Look	60	1,000	Clothing
	Mammas & Pappas	32	740	Babywear, etc.
	Mothercare	79	2,500	Babywear, etc.
	Bonmarche	318	2,887	Clothing
	Thomas Cook	560	9,000	Travel Agents
	LK Bennett	41	480	Clothing
Patisserie Valerie	71	900	food and beverage	
2018	HMV	133	2,200	music, DVD, games
	House of Fraser	59	17,500	department
	Poundworld	350	5,300	discount
	Wine Rack / Bargain Booze	760	4,000	off licences
	Maplin	200	2,500	IT
	Toys 'R' Us	105	3,200	toys & games
2017	Palmer & Harvey	-	4,000	wholesaler
	Store Twenty One	76	1,080	clothing/variety chain
2016	BHS	164	11,000	clothing/variety chain
	Brantano	200	2,000	footwear
2014	Phones4U	550	5,600	mobile phones
2013	HMV	238	4,350	music
	Blockbuster	528	4,190	DVD rental
2012	Comet	236	7,000	electricals
	Game	600	6,000	video games
	Peacocks	550	9,600	clothing
	JJB Sports	250	6,300	sportswear
	Alexon	990	2,700	clothing
2011	Focus DIY	170	3,919	DIY
2009	Wine Rack/ Threshers/ Bottoms Up/ Victoria Wine	1,300	6,500	off licences
	Zavvi	150	3,500	music
2008	Ethel Austin	300	3,100	clothing
	Adams	271	3,200	children's clothing
	Woolworths	820	30,000	variety chain
	Stead & Simpson (Shoe Express/ Lilley & Skinner/ Peter Briggs)	375	3,000	footwear
	Faith Shoes	284	2,000	footwear
	Roseby's	280	2,000	furnishings
	Motor World	284	2,235	car accessories
	MFI	173	1,100	furniture
	Stylo Shoes	1,067	5,400	footwear
Allied Carpets	273	2,300	floor coverings	
Blacks Leisure	400	2,640	outdoorwear	
TOTAL:		15,330	233,305	

Source: Centre for Retail Research (2020)

Notes: These figures relate to retail corporations that went into legal administration in the year shown. The test for inclusion is (a) administration and (b) national significance. The table does not indicate or purport to show whether the company has disappeared, such as Woolworths, or still survives in a robust manner, such as HMV or Peacocks. Appearance in the table does not imply that the brand is no longer used or does not trade. Where a retailer has suffered several failures the date used is normally the one where most assets or staff were involved. Retailers that have shrunk their businesses without going through administration are not included.

4.30 In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many are struggling to position themselves quickly enough to absorb rising costs and engineer the vital transition to a more technology-focused business model. These trends and challenges will have been further exacerbated and accelerated by the impact of COVID-19.

RISING OCCUPANCY COSTS

- 4.31 'Bricks and mortar' retailers are having to absorb higher than inflation increases in year-on-year occupancy costs (for example, rents, business rates, service charges, staff costs, etc). Research shows that, on average, retailers' operating costs increased by +3.5% in 2018. This outpaced sales growth for many retailers, eroding profitability and resulting in more store closures.
- 4.32 As described above it is not a "level playing field" between high street and online retailing, or between high street and out-of-centre retailing. In response to the budgetary challenges from rising costs and tight margins, retailers will need to drive up efficiencies and productivity from existing floorspace to remain viable.
- 4.33 It is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. The latest *Retail Planner Briefing Note* (RPBN) prepared by Experian at the time of finalising this study provided forecasts of annual floorspace productivity growth rates based on two different scenarios: (i) the 'constant floorspace scenario', based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and (ii) the 'changing floorspace scenario', which takes account of the impact of new retail development on average retailer sales performance. The table below sets out the differences between the two scenarios.

Table 4.2: Floorspace Productivity Growth Rates (year-on-year growth %)

	2020	2021	2022	2023-27	2028-40
CONSTANT FLOORSPACE:					
Convenience Goods:	5.4%	-4.8%	0.7%	0.3%	0.3%
Comparison Goods:	-14.1%	8.6%	3.4%	2.6%	2.9%
CHANGING FLOORSPACE:					
Convenience Goods:	5.4%	-4.7%	0.8%	0.0%	0.0%
Comparison Goods:	-14.1%	10.1%	4.5%	3.0%	2.6%

Source: Experian Retail Planner Briefing Note 18 (October 2020). Figures 3b/3c and 4a/4b.

- 4.34 As Experian explain, budgetary pressures mean that retailers will have to increase efficiencies from current floorspace: including through redevelopment/repurposing of existing floorspace; adoption of new technology and innovations; more effective marketing strategies; and using internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK. Experian conclude that these trends confirm the limited prospects for new retail floorspace development.
- 4.35 For these reasons we prefer to test higher 'productivity' growth rates for retail planning assessments, as they better reflect national trends and the need for existing retailers to increase their sales potential and profit margins to remain viable.

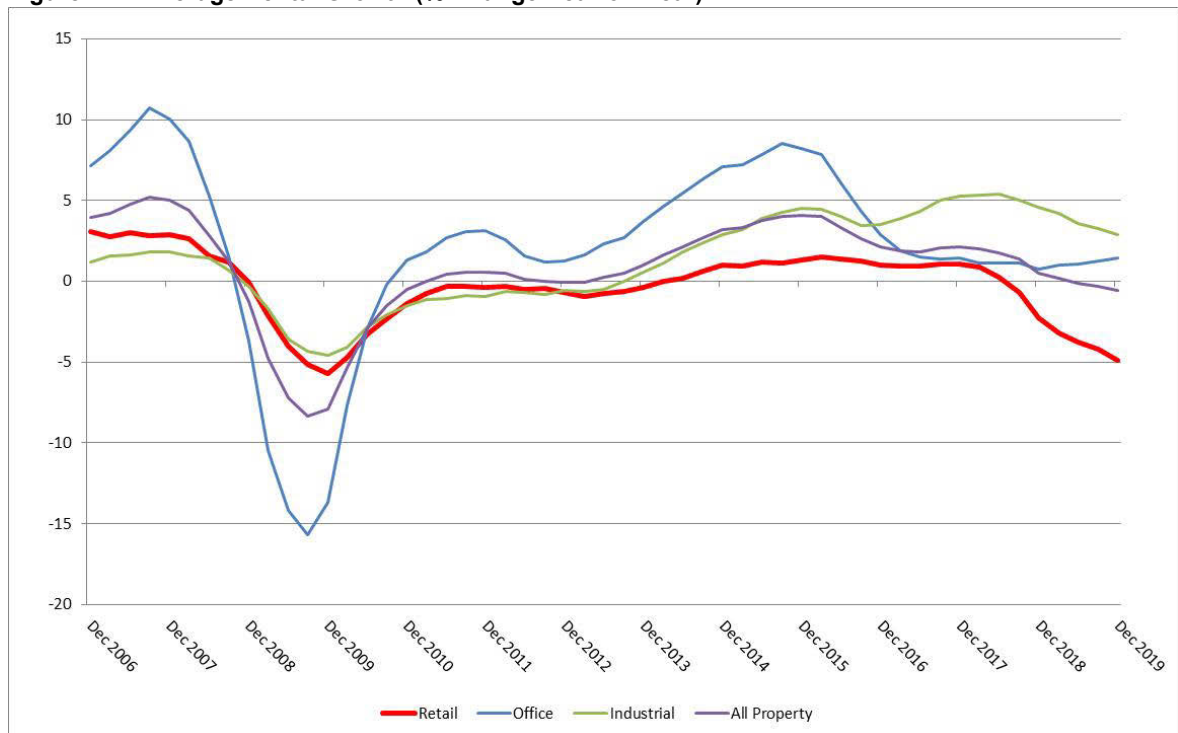
RETAIL & SHOPPING CENTRE INVESTMENT

- 4.36 The rise in the number of retailer "casualties" and vacancy levels has created a challenging environment for existing retailers and investments in towns and shopping centres across the UK. The current investment climate is becoming increasingly polarised. The top 50 shopping locations (which includes Bluewater) generally have the best prospects for attracting new investment and development. This is because they benefit from strong catchments and the necessary critical mass of shops, leisure facilities and other uses to remain commercially viable and attractive investment

propositions. Outside of the top 50 it is the more secondary towns and shopping locations that remain vulnerable to further reductions in their existing retail and commercial offer (which includes Dartford Town Centre). This is against the backdrop of limited and falling demand for new shops and commercial space.

- 4.37 The latest rankings for Dartford Town Centre, for example, shows that it was placed 292nd out of the 3,400 centres and shopping destinations in the UK covered by Javelin VENUESCORE²⁹. It is ranked below Bluewater (27th) and Bexleyheath (156th), but slightly above Gravesend (309th).
- 4.38 Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. In turn this fall in demand is impacting on property values and rents. For example, LSH research conducted before the pandemic showed that the retail sector recorded a +4.9% year-on-year fall in rents in May 2019³⁰. As the figure below shows, retail has performed poorly compared with the other property sectors since the economic crisis in 2007/08. This trend has been further exacerbated by the COVID-19 pandemic.

Figure 4.2: Average Rental Growth (% Change Year-on-Year)



Source: MSCI

- 4.39 In simple terms many centres and shopping locations across the UK simply have too much retail floorspace stock, or they have the “*wrong type*” of retail floorspace that does not meet the needs of modern national retailers for larger format shop units. This over-supply of retail floorspace and limited market demand is placing further pressures on the viability of existing stores and shopping centres. In turn, this makes it difficult for landlords, investors and retailers to justify additional capital expenditure.
- 4.40 The shopping centre sector also has faced significant challenges over the past decade from the rise of online shopping, falling market demand and increasing retailer failures. In recent years, the response to diminishing demand from traditional retailers has been to turn to the casual dining and

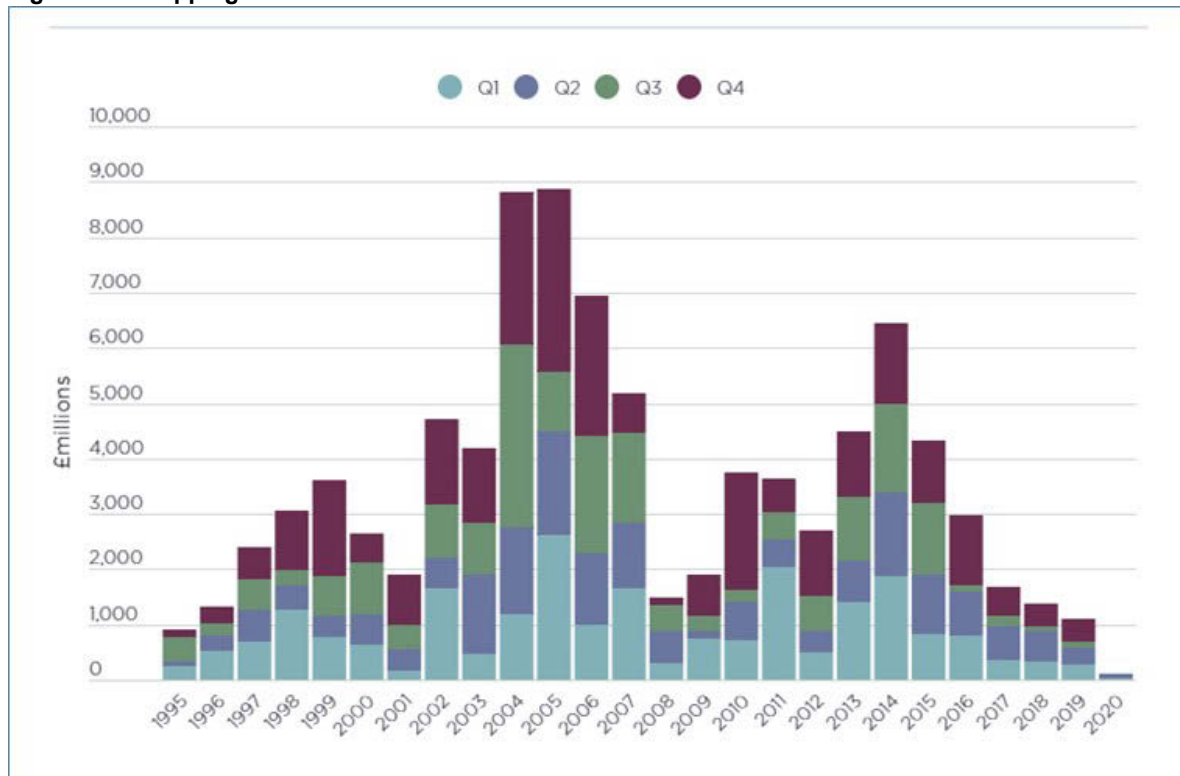
²⁹ VENUESCORE is the weighted count of multiple retailer presence by venue. For example, the presence of anchor retailers such as Debenhams and John Lewis have a higher scorer than other multiples.

³⁰ LSH research using MSCI data

commercial leisure (for example, cinemas) to take up surplus space. However, this is now becoming increasingly difficult due to the pressure on disposable income and a fall in demand from food and beverage operators in an increasingly “saturated” market. As a result, shopping centre owners and landlords are struggling to retain existing tenants, let alone attract new retailers into vacant shops. Against this backdrop, occupiers are negotiating shorter lease terms and greater incentives from landlords to continue trading in the face of increasing online competition and economic uncertainty. This will further force down rents and profits across more marginal, secondary shopping locations.

- 4.41 The COVID-19 pandemic has accelerated the trends impacting on the shopping centre sector. The demise of shopping centre owner Intu Properties is an example of the impact of these trends. With total debts of £4.5bn it failed to raise more capital and went into administration in June 2020. This is notwithstanding the fact that it owns some of the highest profile shopping centres in the UK (including Glasgow's Braehead Centre, Manchester's Trafford Centre, Nottingham's Victoria Centre and Norwich's Chapelfield). Intu's business model, like most shopping centre owners, relied on ever-rising rental income from its tenants, along with a year-on-year increase in the value of its property portfolio, but recent trends have had a significant adverse impact on the viability of the shopping centre sector.
- 4.42 In this context, research shows that total investment activity in the first half of 2020, of circa £118.5m, was the lowest level ever seen (see figure below). Presently consumer confidence is at an all-time low due to the impact of the pandemic, which has resulted in rising unemployment, and the enforced closure of retail and leisure businesses during a series of lockdowns. All these factors are resulting in a significant structural shift in retail property and shopping centres, and the way in which this type of floorspace will be utilised in the future.

Figure 4.3 Shopping Centre Investment: 1995-2000



Source: Spotlight: Shopping Centre and High Street – Q2 2020 – (Savills, August 2020)

4.43 At the same time as many of the traditional investors in retail and shopping centres have looked to “exit” the sector, joint research by LSH and Revo³¹ shows that Councils invested a record £775m purchasing shopping centres between 2016-2019. The investment and business rationale for many of these purchases was to provide local authorities with more control of the planning, regeneration and management of their town centres. The funding of these purchases was also generally supported by low-cost loans from the Public Works Loan Board (‘PWLB’). For example, Surrey Heath Borough Council’s purchase of The Square in 2016 and its ongoing investment in the shopping centre is a good example of where a local authority is taking a proactive role in maintaining and enhancing the vitality and viability of its town centre. There are other examples across the UK of Councils “*taking back control*” of their town centres. However, the impact of COVID-19 on the retail and the shopping centre sectors, along with tighter restrictions on PWLB lending and higher risks generally, has inevitably impacted on Council purchases of shopping centre and retail property assets.

OUT-OF-CENTRE RETAILING

4.44 The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. As described above, the main grocery retailers have pulled back from new larger format superstore openings in edge and out of centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets. The exception to this is the deep discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out of centre locations.

4.45 Vacancy levels in out-of-centre retail warehouses and parks have also increased over the last decade following the closure of major operators (such as, for example, Toys R Us, Poundworld, Office Outlet, etc.), and a reduction in the store portfolios of other major out-of-centre retailers (such as, for example, B&Q and Homebase). There are likely to be further increases in closures, particularly in the poorly performing “*first generation*” and secondary shopping locations, as leases come up for renewal and more retailers go into administration. As a result a number of out-of-centre foodstore and retail warehouse sites are being repurposed and/or redeveloped for alternative uses, including new residential uses.

4.46 Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and convenient access to the road network. This is still an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and “*replaced*” these with ‘Simply Food/Food Hall’ branded stores in out-of-centre locations (for example in Dover, Maidstone, Great Yarmouth, Harlow, Wakefield and Rugby). As a result, retailers who previously anchored the vitality and viability of town centres, are now competing directly with high streets for shoppers, spend and sales.

COMPETITIVE RESPONSES TO THE RETAIL ‘CRISIS’

4.47 Falling market demand, rising occupancy costs and increasing competition from online and out-of-centre shopping is resulting in more vacant retail space due to retailers either downsizing or closing their store portfolios (e.g. Marks & Spencer and Debenhams). The current and future challenges for many high streets and shopping locations will be how to retain existing businesses, fill/replace the voids and attract new investment.

³¹ LSH and Revo research paper published in 2019 entitled: ‘*Fixing Our Broken Town Centres*’

- 4.48 In those cases where retail vacancies are long-term and more often than not concentrated in secondary shopping streets/pitches, it will be necessary to plan for alternative uses and/or consider options for redevelopment. This may include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate alternative uses such as business start-ups, art studios and galleries, community/youth centres, etc. Another option is for ‘pop-up’ and ‘*meanwhile uses/leases*’, which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Other options include the conversion or redevelopment of former retail units to residential.
- 4.49 Although the multiples/brands will remain important anchors for shopping locations, helping to generate trips, footfall and spend, the successful town centres of the future will be characterised by a more diverse mix of independent businesses. Street markets³² and market halls can also provide the platform for new businesses to grow and flourish, and make significant contributions to the overall vitality and viability of centres, and local economies. This is recognised by the NPPF (see paragraph 85). The successful and thriving markets of the future will be those that are able to respond to the changing needs of a town’s catchment population. At the same time successful markets can appeal to a wider customer profile, attracting visitors from outside a town’s “normal” catchment area and helping to increase footfall and linked trips to the benefit of other shops and businesses. In this context, Dartford has a market charter, which prevents other competing markets being established in the wider area. This historical charter remains important to the success of the town centre’s existing markets (on Thursdays and Saturdays).
- 4.50 The convergence of online and physical space also represents a further competitive response to the challenges facing our town centres and high streets. For example, both ‘Amazon’ and ‘eBay’ are trialling the use of physical space to showcase their services and goods. Amazon’s “*Clicks and Mortar*” stores have been trialled in Manchester, Cardiff, Edinburgh and Sheffield, and offer more than 50 local and national ecommerce businesses the opportunity to explore customer-facing trade for the first time to help drive growth, with the benefit of in-store business advisers and workshops to help build their skills in selling both in-store and online. In Wolverhampton, eBay also opened its first “pop-up” concept store in April 2019. Branded as ‘*Home Grown*’, it provided a temporary physical space to showcase eBay’s initiatives to help local businesses evolve for the 21st Century through physical and online retail sales. eBay’s partnership with City of Wolverhampton was on the back of research that showed that many small-scale retailers and independent business in the UK do not necessarily have an online presence aimed at generating sales through a defined website, social media channel or presence on an online marketplace. Other purely online retailers are also considering this crossover into physical space including Boohoo (fashion retailer), Sonos (speaker systems) and Birchbox (cosmetics). This omni-channel approach to retail could help to drive market demand as more traditional physical retailers close on the High Street.
- 4.51 There are also wider digital technological changes that together will impact on the future of town centres and the way the nation lives, shops, works, plays and carries out a wide range of activities. Smart Cities, Artificial Intelligence (AI) and 5G will continue to redefine the infrastructure and interactions between consumers, commercial businesses, public services and other uses and activities. At this stage we can only speculate about outcomes, but examples exist of how technology is currently being used to increase trips and footfall in centres. For example in **Bristol** the ‘*Gromit Unleashed*’ sculpture trails were first trialled in 2013. They positioned 80 artist-designed ‘Gromit’ sculptures across the city. Visitors were then invited to go on a smartphone-guided sculpture hunt, allowing them to find and record the various ‘Gromits’ dotted throughout Bristol. **Lichfield** has also

³² The Rhodes Survey (2005) first reported on the economic value of street markets. Also see ‘*A Policy & Research Review of UK Retail and Wholesale Markets in the 21st Century*’, by the Retail Markets Alliance (2009)

sought to increase the publicity for its High Street shops through social media. Businesses around the city have played their part by simply taking photos of their products and services and posting them to social media feeds.

SUMMARY

- 4.52 In summary, retailers and businesses in the UK's towns and high streets are facing a myriad of challenges, many of which have been accelerated by the impact of the COVID-19 pandemic. In many cases our traditional high street retailers are "*burdened*" with too many stores, unsuitable space and/or inflexible lease structures. This will either result in further retail "*casualties*" on the high street and/or inhibit any critical investment that may be needed to repurpose floorspace that is not "*fit-for-purpose*" and/or investment in the IT infrastructure needed to key pace with pure online competitors.
- 4.53 These challenges and threats to the high street will continue to grow over the short, medium and long term. Dartford Town Centre and other centres in the Borough will need to embrace the new dynamics and trends, and build in resilience to adapt to future changes. This will be based, in part, on identifying and building on their unique attractions and competitive positioning where possible, and embracing the digital transformation of centres. It may also result in the need for the consolidation, reduction and repurposing of physical retail space, rather than any significant expansion.

5. DARTFORD TOWN CENTRE: HEALTHCHECK

- 5.1 This section sets out the health check assessment for Dartford Town Centre. The approach is informed by the *Key Performance Indicators* (KPIs) outlined in the *Planning Practice Guidance*³³ (PPG), where the data is available. The healthcheck is supplemented by the following primary research that was specifically commissioned to inform this study:
- the face-to-face **street interview survey** of over 500 visitors to the town centre carried out by NEMS Market Research in January/February 2020 (see Section 6);
 - the **pedestrian footfall survey** across the town centre that was also carried out at the same time as the street interview surveys by NEMS; and
 - the **telephone interview survey** of over 1,000 households conducted by NEMS in October/November 2019 across a defined catchment area that extends beyond the Borough area (see Section 9).
- 5.2 The health check also draws on a wide range of published standard commercial datasets that are commonly used to help inform retail and town centre assessments. These include the *Town Centre Category Reports* published by Experian GOAD, PROMIS Reports prepared by PMA and other commercial datasets provided (e.g. sourced from CoStar, EGi, etc.). Where possible we also highlight the changes in some of Dartford Town Centre's KPIs based on the findings of *2010 Retail and Commercial Leisure Study* ('2010 RCLS'). Finally LSH's healthchecks are also informed by the in-house commercial knowledge and research intelligence of our national and local property consultants.

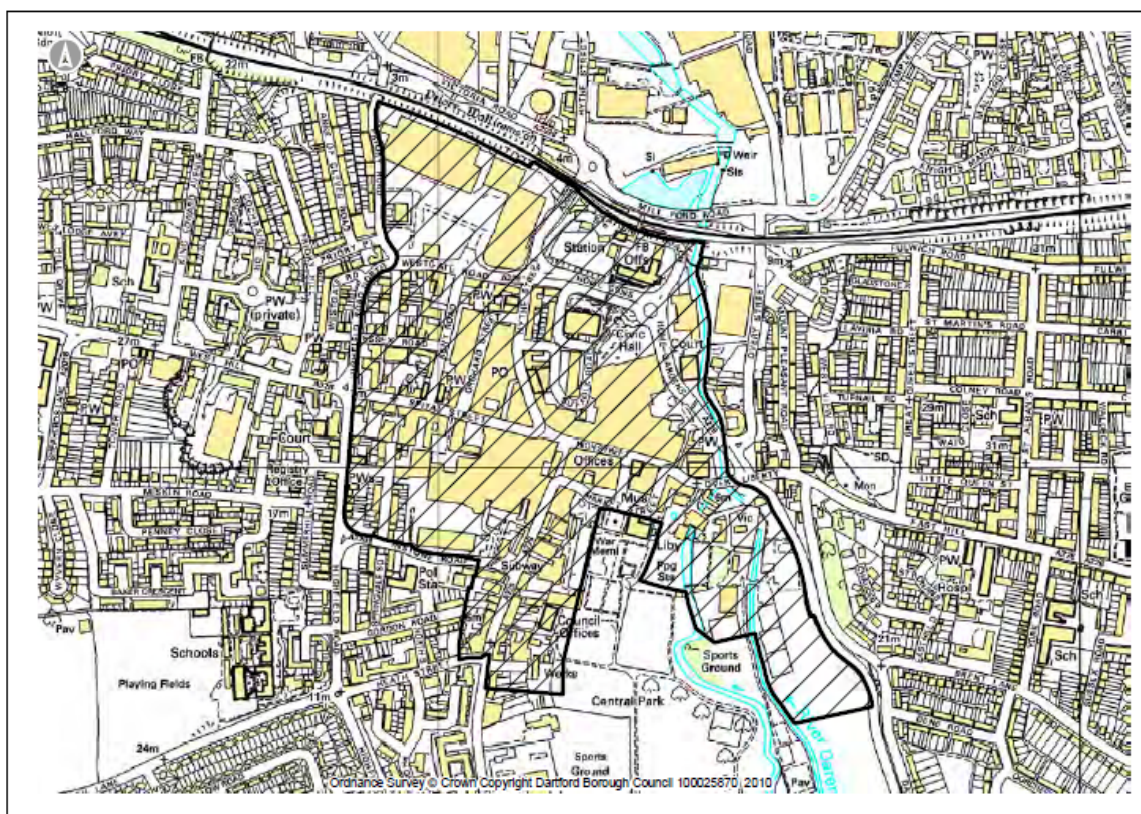
CONTEXT

- 5.3 Dartford is an historic market town dating back to Roman times, with a rich heritage and a good number of quality buildings, particularly along the High Street. The town centre is at the heart of an economically buoyant and growing Borough. Its proximity to London, as well as good road links, notably the M25 and A2, and public transport mean that it is an increasingly attractive location for new employment and residential development.
- 5.4 Dartford town centre provides a range of retail, services, leisure, cultural and civic facilities although it is considered to function primarily as a lower to mid-tier retail and service destination for local residents. The 2010 RCLS identified that Dartford's retail offer had been in decline for some time and that many local residents were travelling to more distant centres for their main food shopping, everyday services and regular comparison shopping needs³⁴. We assess whether this trend has continued over the last decade in more detail in this section and throughout the rest of this study.
- 5.5 Map 1 of the Core Strategy sets out the Town Centre Boundary and this is reproduced below. The distinctive form of the town centre creates a clearly defined retail core. This is reinforced by the defined edges on all sides, namely: (i) the river to the east; (ii) the railway line to the north; (iii) Highfield Road to the west; and (iv) Brooklands Fishing Ponds to the south. The town's *Primary Shopping Area* (PSA) is defined by the 2017 Dartford Development Policies Plan (see Section 2), based on designated Primary Shopping Frontages (PSFs) and Secondary Shopping Frontages (SSFs). The PSF includes the pedestrianised High Street and the Orchard and Priory Shopping Centres together with parts of Hythe Street, Spital Street and the northern part of Lowfield Street.

³³ Paragraph: 006 Reference ID: 2b-006-20190722

³⁴ For example, refer to paragraph 2.16 of the 2010 RCLS.

Figure 5.1: Dartford Town Centre – Defined Boundary



Source: Core Strategy (2011). Map 1.

5.6 In summary the town's retail and leisure offer is focussed on the pedestrianised High Street and in its three main shopping centres. These are:

- **Priory Shopping Centre:** opened in 1975 and comprises a total retail floorspace of circa 13,470 sqm gross), anchored by Sainsbury's. The centre was sold to Curzon Capital in 2015 for £33m. They subsequently invested in refurbishment and new signage. The centre also has a market style hall with a number of permanent and temporary independent retail and food units. It is now owned by Ellandi, who have plans for the further redevelopment and reconfiguration of the centre.
- **Orchards Shopping Centre:** opened in 1989 and has a total floorspace of 10,035 sqm gross. The centre is owned by Daejan (Dartford Ltd). It has benefitted from three phases of improvement and refurbishment, including most recently to accommodate a new Aldi store (following the closure of Waitrose) and a first floor gym.
- **Prospect Place:** a more-recent hybrid shopping park jointly owned by British Land, Dartford Partnership and Hercules Unit Trust. It comprises some 14 units trading from a total floorspace of 17,837 sqm gross. Its offer is characterised by larger format multiple retailers and leisure operators, including TK Maxx, M&S Foodhall, Asda Living, Matalan and B&Q and Pizza Hut.

5.7 The Council's adopted and emerging plans, along with the Dartford Town Centre Framework SPD (2018 Framework), place the regeneration and transformation of Dartford Town Centre as a key priority and objective (also see Section 2 of this study). The Core Strategy's Vision and Strategic Objectives for Dartford Town Centre is to create a lively and vibrant town centre with a flourishing day and evening economy that attracts local residents for shopping, leisure, cultural and other activities and to enjoy its unique assets, set in an attractive public realm. The 2018 Framework also sets out the vision for the town centre as *"...a place which invests in its people and future generations, celebrating their creativity and talent to deliver on the aspiration to make Dartford a 'Town Centre for the Future'"*.

- 5.8 Against this background the town centre has recently benefitted and is set to benefit from significant new investment and development by both the private and public sectors. The major projects are described in more detail in Section 2 and include:
- investment in the phased public realm improvements to Market Street, the High Street and Hythe Street, as well as improvements for pedestrians and cyclists at the main gateways into the centre funded by Homes England and by the Local Growth Fund;
 - improvements to Central Park and the Acacia Estate, including new facilities, a programme of events and improved pedestrian access to Market Street/ a new public square;
 - refurbishment of Dartford Museum and its integration with the library;
 - significant investment in the refurbishment and upgrade of Fairfield Leisure Centre;
 - installation of way-marking signs and additional cycle stands at the railway station, following its refurbishment; and
 - introduction of free WiFi access across the town, enabling local traders to inform shoppers of deals, as well as providing updates on local news and events.
- 5.9 Other major town centre regeneration projects (also refer to Section 2) that are currently underway include the redevelopment of Lowfield Street by Bellway Homes for a residential-led mixed use scheme comprising some 548 new dwellings (known as Copperhouse Green). Some 2,000 new homes have also been developed or are being delivered on the Northern Gateway Strategic site with good access to the railway station and town centre; with the potential for further residential to viably come forward.
- 5.10 As described in Section 2, there are also the proposals by Muse Developments Ltd, in partnership with the Council and Homes England, for the c.£100m regeneration of the Hythe Street site (incorporating the former Co-op façade). The development would include 120 new residential units, a multiscreen cinema, 85-room hotel, health and wellbeing hub and a mix of flexible commercial uses.
- 5.11 The growth and interest in new residential-led development in the Town Centre also provides an opportunity for a wider mix of uses to be provided, including the potential for modern specification and flexible retail/leisure/workspace units at ground floor and above.
- 5.12 In this context, the following provides an overview of Dartford Town Centre's attraction, health and performance.

RETAIL, SERVICE & LEISURE OFFER

- 5.13 Dartford Town Centre provides a diverse range and choice of retail, service, leisure, cultural and civic facilities, along with a mix of residential and workspace accommodation. To help identify the current provision and the changes over time, the tables below summarise the broad retail and service composition (measured by outlets and floorspace) in 2009, 2015 and 2019 based on Experian GOAD Category Reports.

Table 5.1: Changes in town centre retail composition by outlets and floorspace, 2009-19

	2009			2015			2019		
	Number	% of Total Outlets	UK Average	Number	% of Total Outlets	UK Average	Number	% of Total Outlets	UK Average
Convenience	24	6.6%	8.8%	24	7.0%	8.6%	32	9.0%	9.2%
Comparison	93	25.5%	34.3%	87	25.3%	32.0%	87	24.6%	29.3%
Service	168	46.0%	45.8%	166	48.3%	48.2%	169	47.7%	49.5%
Other				2	0.6%	0.1%	0	0.0%	0.1%
Vacant	80	21.9%	10.9%	65	18.9%	11.2%	66	18.6%	11.9%
TOTAL	365	100%	100%	344	100%	100%	354	100%	100%

	2009			2015			2019		
	Goad Floorspace (sqm)	% of Total Space	UK Average	Goad Floorspace (sqm)	% of Total Space	UK Average	Goad Floorspace (sqm)	% of Total Space	UK Average
Convenience	10,024	11.0%	14.0%	10,405	11.9%	15.2%	12,607	14.7%	15.4%
Comparison	40,125	44.0%	38.0%	38,267	43.9%	35.9%	36,604	42.7%	33.6%
Service	30,249	33.2%	39.0%	29,943	34.3%	39.9%	28,596	33.3%	39.9%
Other				1,050	1.2%	0.1%	0	0.0%	0.1%
Vacant	10,823	11.9%	9.0%	7,584	8.7%	9.0%	7,973	9.3%	10.5%
TOTAL	91,221	100%	100%	87,248	100%	100%	85,779	100%	100%

Source: Experian Goad Category Reports. Figures may not sum due to rounding

Notes: The floorspace figures are derived from Experian Goad Plans and these only show the footprint floorspace and the site area without the building lines. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres.

5.14 According to Experian there were some 354 retail and service outlets in the town centre (including vacant units) in 2019 trading from a total floorspace 85,779 sqm gross³⁵. Average unit size is circa 242 sqm (2,600 sqft). This represents a slight fall (-3%) from the 365 outlets recorded in 2009 and a -6% reduction in total floorspace. The following provides a more detailed summary of Dartford's current retail, service and leisure offer and highlights any significant changes since 2009.

Comparison Retail

5.15 There are 87 comparison retail outlets in the town centre, trading from a total floorspace 36,604 sqm gross. This represents a -6.5% reduction from the 93 outlets recorded in 2009 and a -8.8% fall in total floorspace, down from 40,125 sqm gross. Although the number of comparison outlets expressed as a proportion of total outlets (24.6%) is below the (Experian Goad) national average of 29.3%, Dartford does have above average provision of comparison floorspace (42.7%) compared with the national average figure (33.6%).

Convenience Retail

5.16 Although the total number of food outlets has increased from 24 in 2009 to 32 in 2019, and the total floorspace has increased from 10,024 sqm to 12,607 sqm, Dartford's convenience goods offer has consistently been below national averages over the last decade. A more detailed breakdown of the town centre's food and convenience offer shows that it either has no outlets or an under-representation in the following categories: bakers and confectioners (3 outlets), fishmongers (no outlets), greengrocers (no outlets) and off licenses (no outlets). Although this audit does not cover the street market's wider food and convenience offer, the general under-provision of food and convenience retailing in the town centre and within specific categories indicates that there could be

³⁵ It should be noted that the gross floorspace figure only covers ground floor floorspace and should be treated with caution.

potential to increase and improve the quality of its independent and multiple offer, subject to market interest and demand.

Retail, Leisure and Financial Services

5.17 There were 169 service businesses in Dartford in 2019, occupying a total floorspace of 28,596 sqm. The number of services has remained relatively constant over the last decade. Overall provision is below the national average (as measured by outlets and floorspace). There could therefore be potential to expand the offer, subject to market demand. The following provides a more detailed breakdown of Dartford's current retail, leisure and financial services offer.

- The 72 **leisure service** outlets have a total floorspace of 15,040 sqm. The 47 restaurants, cafés and fast food outlets account for 62.5% of total leisure services; which represents 13.3% of all outlets and is below the national average of 17.3%. Other leisure services identified by Experian Goad include: bingo and amusements (2 outlets), casinos and betting offices (4 outlets), clubs and nightclubs (5 outlets), hotels and guesthouses (2 outlets), sports, gym and leisure facilities (4 outlets) and the theatre. However, there does appear to be potential to increase the number of leisure services in the town centre, particularly as its overall retail offer is anticipated to fall in line with current trends. For example, the town centre does not currently have a cinema, which represents a significant “gap” in its daytime and evening offer. This “gap” should be addressed by the planned regeneration of Hythe Street (Westgate Dartford) for a new cinema and mix of food and beverage outlets.
- The 51 **retail services** occupy a total floorspace of 5,314 sqm. This represents 14.4% of total outlets and is slightly below the national average of 15.1%. The retail services category predominantly comprises 35 health and beauty outlets (2,239 sqm), although total floorspace provision (2.6%) is still below the national average (3.7%). The town also has a relatively good mix and provision of other retail services including: dry cleaners and laundrettes (3 outlets), opticians (3 outlets), and a travel agent. There is also a post office counter in WHSmith.
- There is a relatively good provision of **financial services**. The 46 outlets (8,240 sqm) represent 13% of total outlets, which is above the national average of 9.9%. The services mainly comprise estate agents and property services (16 outlets) and high street banks and building societies (10 outlets). Other businesses in this category include employment/careers services (5 outlets) and financial/legal services (10 outlets). However, the provision in this sector is vulnerable to the impact of the closure of high street banks due to the increased use of online banking.

USE CLASS DISTRIBUTION

5.18 To help inform the assessment of the diversity and mix of uses in the Town Centre we have also drawn on the audits conducted by the Council as part of their annual monitoring. These audits identify the mix of uses within the defined primary and secondary frontages. However it should be noted that they are based on locally defined frontages, and do not cover as wide an area as audited by Experian Goad. This means the Council's figures are not directly comparable with the Experian Goad data. The audits carried out by the Council also classify the different uses under the 1987 Use Classes Order, which has since been revoked and replaced by the new UCO which came into effect on 1st September 2020.

5.19 The table below shows the changes in Dartford's retail, leisure and service composition by Use Classes in 2017 and 2019 based on the Council's monitoring reports.

Table 5.2: Dartford Town Centre: Retail and Service Composition by Use Classes, 2017-19

	2017					
	PRIMARY FRONTAGES		SECONDARY FRONTAGES		TOTAL	
	No	%	No	%	No	%
A1 Convenience	10	7.0%	11	11.3%	21	8.8%
A1 Comparison	64	44.8%	21	21.6%	85	35.4%
A1 Service	10	7.0%	11	11.3%	21	8.8%
A2 Financial and Professional Services	22	15.4%	14	14.4%	36	15.0%
A3 Restaurants and Cafés	10	7.0%	8	8.2%	18	7.5%
A4 Drinking Establishments	3	2.1%	1	1.0%	4	1.7%
A5 Hot Food Take-away	2	1.4%	6	6.2%	8	3.3%
C2: Residential Institutions	0	0.0%	1	1.0%	1	0.4%
D1: Non-residential Institutions	2	1.4%	7	7.2%	9	3.8%
Sui Generis	3	2.1%	4	4.1%	7	2.9%
Vacant	17	11.9%	13	13.4%	30	12.5%
TOTAL:	143	100.0%	97	100.0%	240	100.0%

	2019					
	PRIMARY FRONTAGES		SECONDARY FRONTAGES		TOTAL	
	No	%	No	%	No	%
A1 Convenience	13	9.0%	9	9.6%	22	9.2%
A1 Comparison	58	40.3%	20	21.3%	78	32.8%
A1 Service	11	7.6%	10	10.6%	21	8.8%
A2 Financial and Professional Services	22	15.3%	14	14.9%	36	15.1%
A3 Restaurants and Cafés	10	6.9%	8	8.5%	18	7.6%
A4 Drinking Establishments	3	2.1%	2	2.1%	5	2.1%
A5 Hot Food Take-away	2	1.4%	6	6.4%	8	3.4%
C2: Residential Institutions	0	0.0%	1	1.1%	1	0.4%
D1: Non-residential Institutions	2	1.4%	6	6.4%	8	3.4%
Sui Generis	3	2.1%	4	4.3%	7	2.9%
Vacant	20	13.9%	14	14.9%	34	14.3%
TOTAL:	144	100.0%	94	100.0%	238	100.0%

Source: Dartford Borough Council. Town Centre Audits.

Notes: Use Classes A1-A3 form part of the new Class E under the revised 2020 UCO. Class C2 is unchanged. Class D1 is now split between Class E (including medical or health services (and Class F1 (including museums, libraries, art galleries, schools, churches, etc.)). Under the revised UCO drinking establishments and hot food takeaways (previously A4-A5) are now 'sui generis', along with live music venues (D2), cinemas (previously D2a), concert halls (D2b), bingo halls (D2c) and dance halls (D2d).

5.20 In summary there were some 238 outlets in the town's defined primary and secondary frontages in 2019³⁶, which was only slightly below the 240 outlets recorded in 2017. Of these outlets some 144 (60.5%) were defined as being in primary frontages, with the remaining 94 in defined secondary frontages. More detailed analysis shows that the three purpose-built shopping centres account for half of all the units in the town and the bulk of the floorspace. The following provides a summary of the breakdown of provision for the different Use Classes:

- **Comparison Retail (Class A1)** – the number of outlets has fallen from 85 to 78 between 2017 and 2019 (-8%). The main fall has been within the defined primary frontages; from 64 to 58. Class A1 comparison retailing accounted for 32.8% of all 238 outlets in 2019. The provision in the defined primary frontages was 40.3%, compared with 21.3% in the secondary frontages.
- **Convenience Retail (Class A1)** – there were some 22 outlets in 2019, which represented some 9.2% of total outlets. The number of outlets had increased by one from 2017. Some 13 outlets were located in the defined primary frontages and 9 in the secondary frontages.

³⁶ As stated above, the Council's audit of the town centre is not as extensive as that conducted by Experian Goad in that it only covers primary and secondary frontage areas.

- **Retail Services (Class A1)** – The 21 outlets in 2019 represented 8.8% of total outlets. Ten outlets were classified as being in the town’s primary frontages and 11 in secondary frontages. There was no change in provision from 2017.
- **Financial and Professional Services (Class A2)³⁷** – There were 36 outlets in 2019, which represented no change from 2017. The majority of business (22 outlets) are located in primary frontages and represent 15.4% of total provision out of the 143 outlets. The main services include a number of the major banks and building societies (e.g. Barclays Banks, Halifax, HSBC, Lloyds, TSB, National Westminster Bank, Santander, Co-op and Nationwide).
- **Food and Beverage Uses (Class A3-A5)** – There were some 31 Class A3-A5 outlets in 2019, which is equivalent to some 13.1% of total outlets. The 18 restaurants and cafés (Class A3) accounted for the majority of the town’s food and beverage offer. Some 15 Class A3-A5 outlets are located in the town’s defined primary frontages.

STREET MARKET / MARKET HALLS

- 5.21 Dartford has a market charter, which prevents other competing markets being established in the wider area. This historical charter remains important to the success of the town centre and also represents an opportunity to improve the scale, quality and offer of the market offer. There are two main market days. The **Thursday market** has moved to the High Street from the car park to the rear of the Priory Centre opposite Sainsbury’s. This move has reportedly had a positive impact on footfall and sales. Stalls sell a wide range of food and non-food goods including fruit and vegetables, fresh meat, fish, clothing and footwear, jewellery and hardware items. There are also several refreshment stalls. The **Saturday market** is also on the High Street and is a popular event with a good range of products on offer. Both markets have a positive impact on the attraction, vitality and viability of the High Street and wider Town Centre. Dartford also hosts several speciality markets throughout the year including French, Italian and a Christmas Market. There is also a farmer’s market on the third Friday of every month along the High Street.

OTHER USES & ATTRACTIONS

- 5.22 The town centre has a number of other attractions and facilities that together make a significant contribution to the diversity of its more traditional retail, commercial leisure and service offer. The main attractions include:
- **The Orchard Theatre** - serves a wider sub-regional catchment area that extends to North and West Kent, and south-east London. Over the years it has benefitted from increasing attendance rates and there is potential to capture more linked trip expenditure (before and after shows). The Framework identified that it could become a focal point for a leisure-based “*cultural hub*” in the town centre, with the potential for active frontages and improved connectivity to the rest of the town centre. The current plans for Hythe Street (Westgate Dartford) provide an excellent opportunity to stimulate a thriving restaurant and café cluster to the north of the town centre, anchored by a new cinema and with an enhanced pedestrian route to the nearby Theatre.
 - **Central Park** - offers a major recreational, environmental and leisure asset in the heart of the town centre. The park is located opposite Market Street’s shop and the adjoining library, and complements the town centre’s overall offer. Its scale is also significant; at 19 hectares it represents almost two-fifths of the total size of the town centre (42 hectares). Adjacent developments (e.g. Lowfield Street) and public realm improvements (e.g. Brewery Square) will further strengthen the attraction and “*destination role*” of the park.

³⁷ Financial and professional services include: Banks, Building societies, Bureau de change, Estate agents, Employment agencies.

- 5.23 The town's wider leisure offer, other attractions and facilities include Goodman Dance School, Princes Park Community Stadium and Next Generation Leisure Centre. Sporting and recreational facilities at Acacia Hall include a fitness centre, bowling green, tennis courts and football pitches. The Central library and museum provide cultural facilities. The Council-owned Fairfield Leisure Centre has also benefitted from significant new investment over recent years.
- 5.24 These wider leisure, cultural and park attractions are important assets to the town centre's overall offer and attraction, as they help to generate visits, footfall and activity. There is also significant current and planned investment by the Council to better integrate and "stitch together" all the leisure offers, spaces and attractions across the town and ensure they are easily and safely accessed on foot or by bike.

VACANCY LEVELS

- 5.25 As Table 5.1 shows, Experian Goad recorded some 66 vacant outlets in the Town Centre in 2019, which was equivalent to 7,973 sqm of vacant floorspace. Current vacancy levels, as a proportion of total outlets, are estimated to be 18.6%, which is significantly higher than Experian GOAD's national average of 11.9%. On the positive side, the tables show that vacancy levels have fallen back from 21.9% in 2009 and 18.9% in 2015. Furthermore, a number of the vacancies recorded are in areas that are either currently subject to development (such as the Lowfield Street residential-led regeneration), or have plans for redevelopment (for example, the Hythe Street scheme), which will further reduce the vacancy level.
- 5.26 The Council's latest audit of the town centre in 2019 identified some 34 vacant outlets out of the total 238 outlets in primary and secondary frontages (see Table 5.2). This is equivalent to a vacancy level of 14.3%. As Table 5.2 shows, vacancy levels in the secondary frontages (14.9%) were slightly higher than in the primary frontages (13.9%). The Council's figures also confirm that 15 of the 34 vacant outlets are due to the Lowfield Street redevelopment. As a result the actual vacancy rate (excluding the Lowfield Street redevelopment) is closer to 8%, which is below the (GOAD) national average of 11.9%. The main vacancies in the primary frontages were located in the Priory Centre (8 vacancies), the Orchards Centre (5) and on the High Street (5).

RETAILER REPRESENTATION

- 5.27 When considered against the wider trends impacting on town centres and on national multiple retailers, the town centre has a relatively good mix of national multiples and independent businesses. The latest Experian GOAD Category Report indicated that there were some 103 multiples, which was equivalent to almost 30% of total units. The key retailers and leisure operators by category include the following:
- **Comparison goods:** The main retailers include Argos, Poundland, Boots, Primark, Ryman, WH Smiths, JD Sports and New Look. Prospect Place accommodates a number of the major national multiples in larger format units, including Asda Living, B&Q, Matalan, TK Maxx and Bathroom Store. Dartford does not have a major department or variety store anchor since the closure of the Co-Op in February 2007. However, this does not necessarily represent a weakness given the difficulties recently faced by high profile department store operators, including Debenhams and House of Fraser.
 - **Food and convenience goods:** Sainsbury's in the Priory Centre is the main foodstore anchor, although it is small by modern standards. The former Waitrose in the Orchards Centre was identified as "under-performing" by the 2010 retail study, and this store has subsequently been replaced by Aldi. The other main national foodstore operators include: Marks & Spencer Simply

Food, which opened in Prospect Place (Unit 3) in December 2007, and the Iceland store at 47-49 High Street. Lidl also operate a store on the edge of the town centre.

- **Cafés, restaurants and pubs:** There are a limited number of national brands/franchises in the Town Centre. The main brands are McDonalds (Priory Centre), Wimpy (33-35 High Street), Pizza Hut (Prospect Place), Costa Coffee (Prospect Place) and Subway (Hythe Street/Home Gardens). There are also a limited number of branded pubs (e.g. The Flying Boat Wetherspoon pub on Spital Street). There remains a clear gap in the town's food and beverage offer, particularly focused on its multiple and family-orientated offer. This will be addressed, in part, by the Westgate Dartford scheme proposed for Hythe Street.
 - **Financial services, banks and building societies:** As described above, there is a good representation of high street banks in the town, including Lloyds, Santander, Barclays and Natwest.
- 5.28 The town's independent retailers are mainly located on more secondary shopping streets and areas; principally Hythe Street, Spital Street and Lowfield Street.
- 5.29 In summary the town centre's retail offer lacks 'high-end' comparison goods retailers and anchor department stores such as Marks & Spencer and John Lewis (both of which are located within Bluewater Shopping Centre). Dartford town centre mainly caters for day-to-day food and non-food shopping needs and its offer is predominantly value-led. Speciality and 'high-end' retailers are largely absent from the centre, mainly due to the offer, draw and influence of Bluewater and other competing centres and retail provision.

MARKET DEMAND

- 5.30 The table below sets out the published retailer requirements for Dartford Town Centre as at March 2020. It shows that there are 11 potential requirements, with a total floorspace need ranging from 2,276 sqm to 4,989 sqm gross. In most cases the retail operators identified are seeking outlets of between 120 sqm and 320 sqm.

Table 5.3: Published requirements for Dartford Town Centre

Operator	Use Class	Size (sq ft)		Size (sq ft)	
		min	max	min	max
1 Subway (Kent & Surrey)	A1	200	1,200	19	111
2 One Below	A1	2,500	7,000	232	650
3 Palm	A1	1,500	2,500	139	n/a
4 Machine Mart	A1	1,500	8,000	139	743
5 Starbucks (GK Coffee Franchise)	A1	1,500	2,000	139	186
6 Bensons for Beds	A1	2,500	7,500	232	697
7 ECigWizard	A1	300	1,000	28	93
8 The Perfume Shop	A1	500	1,000	46	93
9 Innkeeper's Lodge	A4	n/a	n/a	n/a	n/a
10 Monkey Puzzle Day Nurseries	D1	2,000	6,000	186	557
11 Fitness4Less	D2	12,000	20,000	1,115	1,858
TOTAL:		24,500	56,200	2,276	4,989

Source: Retailer Requirement List as at March 2020.

- 5.31 The number of requirements has increased slightly from the ten recorded in 2010. In terms of foodstore offer it is notable that neither Tesco nor Morrisons are represented in the town centre or wider Borough area.
- 5.32 Notwithstanding the limited reported demand from retailers and leisure operators, Dartford Borough is experiencing strong demand for businesses premises. The town centre accommodates several

small businesses in office accommodation that, we understand, continue to thrive³⁸. For example, *The Base* on the edge of the Town Centre is a popular location for business start-ups and there is potential for future expansion. This strong demand reflects the relative performance of business parks across the town and Borough as a whole.

COMMERCIAL RENTS

- 5.33 The level of rent which retailers are prepared to pay for retail space within a centre provides a further indication of its attraction, strength and commercial viability (although factors such as the supply of floorspace have an impact on rental value). However prime retail rents across most UK towns and cities have been marked down significantly in recent years, reflecting the wider malaise impacting the UK retail sector as a consequence of both the diversion of retail sales to online and the combined impact of both rising costs and the pressure to discount on retailer profitability. These issues are particularly acute for those retailers burdened with legacy store portfolios and debt and this is clearly evidenced by the number of store closures resulting from corporate failure, CVAs and rationalisation programmes that are impacting on the retail and shopping centre sectors both before and since the COVID-19 pandemic (see Section 4).
- 5.34 According to the latest PMA PROMIS Report the estimated Prime Zone A³⁹ retail rent for Dartford Town Centre stood at £291 per sqm (£27 per sqft) in mid-2020. This represented a -10% fall from the £323/sqm (£30/sqft) recorded in mid-2019 and a -32.5% fall from the £431/sqm (£40/sqft) achieved in 2017. The current prime rent is also significantly below the peak rents achieved in 2007/08 of circa £538/sqm (£50/sqft). In comparison, Gravesend achieved the same Prime Zone A rent as Dartford in 2017 (£431/sqm), but has since experienced a steeper decline of over -42% to circa £248/sqm in mid-2020.
- 5.35 Furthermore, although Bluewater is achieving a higher prime rent of £3,229/sqm (£300/sqft) in mid-2020, it has also experienced a fall in its rents since 2017 of -15.4%, albeit this is not as steep a decline as Dartford or Gravesend. This reinforces the point that the majority of town and shopping centres, even the strongest rated shopping locations in the UK, have experienced a fall in rental values over recent years. This will have been further accelerated by the impact of COVID19, “lockdown” and “social distancing” measures.
- 5.36 Yields are another commercial KPI used to measure the future income on investment properties and often reflect investor confidence in the long-term prospects of a centre⁴⁰. However, commercial yield data should be used and interpreted with care. The latest evidence from CoStar for the first quarter of 2020 shows Dartford has a reported yield level of 6.9%. Dartford’s yields have been relatively consistent at this level for the last decade, but have improved from the 7.4% recorded in 2019. This would suggest improving prospects for the centre, despite generally lower rental levels, and probably reflects the impact of new investment and development currently committed and planned for the centre. In comparison, reported yields for Gravesend are broadly at the same level (6.6%) and, unsurprisingly, stronger yields are indicated for Bexleyheath (6.2%) and Bluewater (6.2%).

³⁸ Dartford Town Centre Framework SPD (2018), paragraph 3.82.

³⁹ Prime Zone A's are the top achievable rent for a retail unit within the town or city at specified date. Data is sourced from PMA and is updated twice yearly.

⁴⁰ In summary, yields are calculated as the return (in the form of annual rental income) as a percentage of the property's cost or market value, annual income and running costs (the capital value). As leases do not make provision for rental reviews, property investments do not often produce fixed incomes. The greater the prospect of upward rental reviews, the lower the yield the investor is willing to accept. Yields can therefore be a useful indicator of the general economic outlook of a centre and low yields can be interpreted to indicate investor confidence in a centre.

OUT-OF-CENTRE RETAIL AND LEISURE

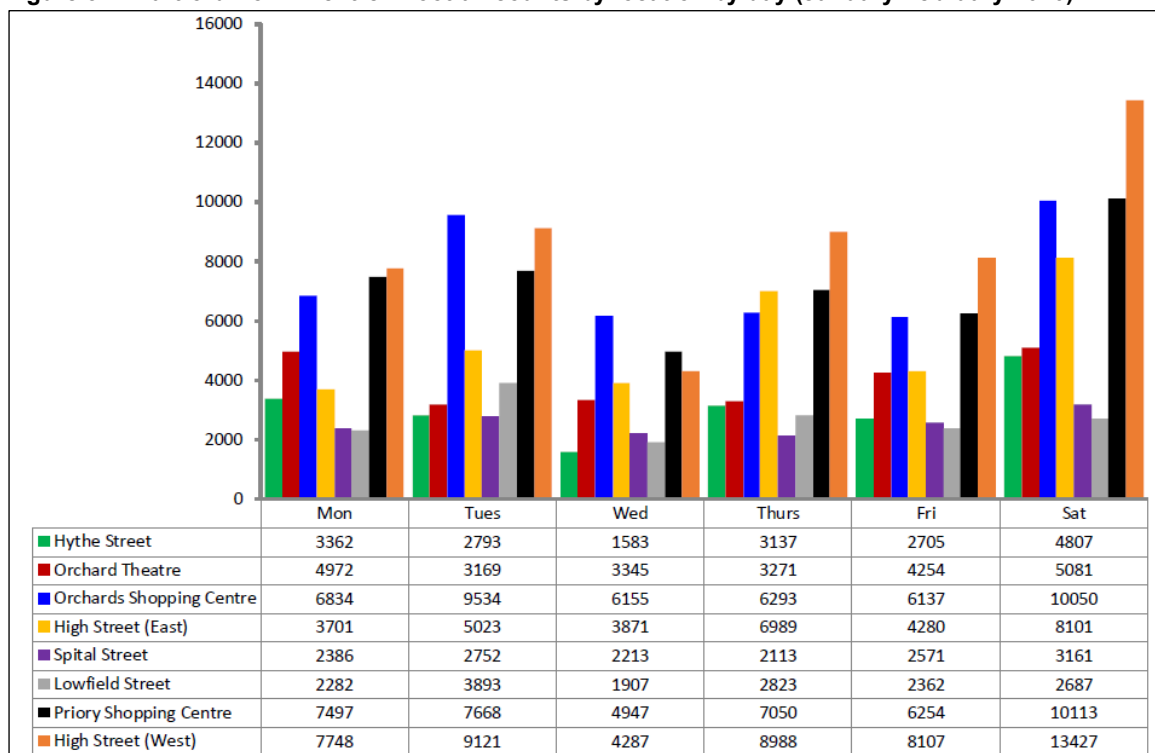
5.37 The main retail and leisure provision outside of Dartford Town Centre includes Dartford Heath Retail Park, located to the south-west of the town off Princes Road (B2174). This is a relatively small retail park with a total estimated gross floorspace of 4,180 sqm (45,000 sqft) and over 100 parking spaces. The main occupiers are: Halfords, Topps Tiles, Jollyes Pet Superstore and Dunelm. Other standalone ('solus') retailers include Wickes on Overy Street, on the north-eastern edge of the defined town centre boundary. There is also a Homebase store off Princes Road (B2174) to the south of the town centre, which includes an in-store Argos 'click-and-collect' facility. The only large format out-of-centre foodstore in the Borough is the ASDA superstore at Crossways Boulevard, Greenhithe, which also includes a petrol filling station.

PEDESTRIAN FLOWS

5.38 To help inform this study a pedestrian flowcount was also carried out by NEMS Market Research as part of the street interview survey. The methodology and footfall counts are set out in detail in Appendix D to this study. The counts were carried out at eight sampling points across the Town Centre, as agreed with the Council, between 10am to 4pm on different days of the week from 29th January to 4th February 2020. This period was prior to, and not impacted by, COVID-19 in Spring 2020.

5.39 Figure 5.2 below shows the footfall counts at each of the eight locations by day.

Figure 5.2: Dartford Town Centre – footfall counts by location by day (January-February 2020)



Source: NEMS Market Research. Dartford Pedestrian Counts. See Appendix D.

5.40 The main headlines are as follows:

- The average daily footfall for the eight location points ranged between 2,533 and 8,613 passers-by. The average overall count was 5,121 per day between 10.00-16.00.

- High Street (West) registered the highest daily average footfall of 8,613, with a peak of 13,427 on Saturday. The daily average footfall was some 61% higher than High Street (East), which recorded a daily average of 5,327.
 - The Orchards Shopping Centre recorded the second highest daily average footfall count of 7,500, followed by the Priory Shopping Centre.
 - The lowest daily average count of 2,533 passers-by was recorded at Spital Street location, with Lowfield Street registering the next lowest count of 2,569.
 - Of the six days monitored, Saturday was the busiest with a total footfall of 57,246. This was 52% higher than the average recorded on a weekday of 37,675.
 - Weekday footfall was highest on the Tuesday (43,953 counts) across all eight locations and lowest on Wednesday (28,308).
 - Footfall at the Orchard Theatre enumeration point was highest on Saturday (5,081) and lowest on Tuesday (3,169).
- 5.41 Although it is difficult to make like-for-like comparisons with other footfall counts conducted in the centre (due to the differences in enumeration points, the weather, etc.), the pedestrian flowcounts conducted in 2006/07 to inform the *Dartford Town Centre AAP* also showed that footfall was strongest on the High Street (between 33-35 High Street and One Bell Corner). One notable difference is that the Priory Centre achieved a much higher (+38%) footfall than the Orchards Centre in 2006/07. The 2006/07 counts also highlighted the positive impact of the Thursday market on total footfall at the entrance to the Priory Centre, with increased flows from the surface car park where the market was located.

TOWN CENTRE ENVIRONMENT

- 5.42 The majority of the town centre is covered by the largest Conservation Area in the Borough. There are some 38 listed buildings and structures, including coaching inns and historic pubs. Together with the significant number of unlisted historic buildings, these create a distinctive and attractive urban character for Dartford. The town's historic street pattern still largely follows the Roman route, aligning with West Hill and East Hill, providing dramatic entrances to the town centre and the High Street. The crossroads between the High Street / Spital Street and Hythe Street has retained its prominence within the town. This contributes to Dartford's market town character. Landmark buildings in the town centre include the Orchard Theatre, Holy Trinity Church, Dartford Library /Museum and surrounds, The Manor Gatehouse (Registry Office) and the Civic Centre. Furthermore, the distinctive topography of the Station Quarter which sits above the town provides good views across the town centre and down the Darent Valley.
- 5.43 There are a number of attractive, important and valuable strategic public spaces and 'gateways' that make a significant contribution to the Town Centre's overall environment. These include:
- **Central Park:** provides a unique town centre setting and its proximity directly adjacent to the High Street places green space and the River Darent within easy walking distance of the town. It also provides a venue for many town centre events as well as active recreation and relaxation. The Memorial Gardens: provide a key landmark in the town centre and a gateway into Central Park. The Council has invested heavily in the park over recent years. Improvements to the neighbouring Acacia Estate and the new public space 'Brewery Square' at Market Street will significantly strengthen the pedestrian linkages across the town.
 - **High Street:** this pedestrianised, busy street is lined by a number of attractive historic buildings. The bi-weekly market and One Bell Corner - a small central space used regularly for events and

exhibitions - enliven the space. The Council is investing in improvements to the high street as part of its public realm strategy for the town centre.

- **Station Concourse:** located between the High Street/Orchard Theatre and Northern Gateway growth area, by the Civic Centre, is a key arrival point and gateway. A modern new station has improved facilities on the concourse, and the railway station is now the busiest in Kent.

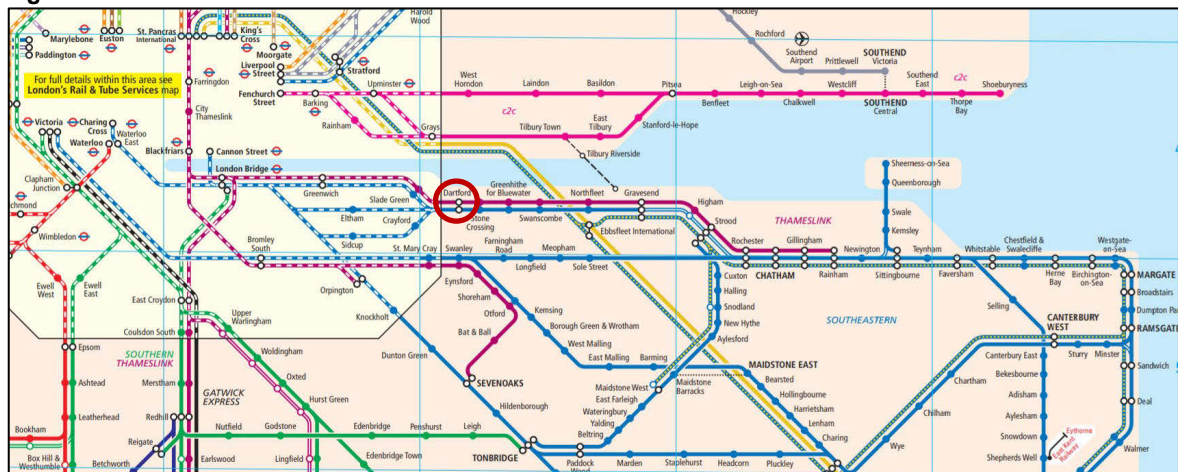
- 5.44 The Framework also identified that other 'gateways' to the town would benefit from investment. For example, Overy Liberty is an important historic gateway to the town, edged by historic buildings, including the listed Holy Trinity Church. The Bridge over River Darent is of historic character but the 2018 Framework identified that it is "*lost*" visually due to the highway "*clutter and grime*". The overall space at Overy Liberty is dominated by the traffic junction, with poor pedestrian and cycle crossings, detracting from the setting of important heritage assets for the town. Suffolk Road, adjacent to Orchard Theatre, is also one of the primary pedestrian routes from the Station to the High Street, and provides access to the Orchard Shopping Centre and Theatre. However the southern section of the route is backed by unattractive service yards and inactive frontages that require investment and improvement to create a more attractive and safe entrance to the High Street. New residential development to the north of the railway line as part of Northern Gateway has also increased pedestrian movement under the railway viaduct and there is a need to enhance these gateway points at Hythe Street, Overy Street and along the river.
- 5.45 Following recommendations in the Framework, Dartford Borough Council is also committed to investing in the Town Centre's public spaces and gateways. This includes a series of new/improved public spaces ranging from major civic spaces (such as Brewery Square), to the creation of small, more intimate spaces, including within new developments. These spaces have all been identified as having potential to improve pedestrian experience and enhance the quality and appearance of the town. The spaces also help to create areas of activity along key pedestrian and cycle routes through the town centre, resulting in better connectivity and improved perceptions of safety.

ACCESSIBILITY & MOVEMENT

- 5.46 Accessibility is a key factor when considering the health, attraction and future prospects of a centre. Ease of access by different modes of travel can have a significant impact on the success and attraction of a centre for customers, businesses and visitors. Overall Dartford town centre benefits from excellent strategic links via rail, bus and road connecting it with the rest of Kent, the South East and London.
- 5.47 The town centre has a relatively good bus network, with some 24 different bus services (17 regular and 7 school buses) managed by two principal authorities (Kent County Council and Transport for London, along with various schools). Home Gardens (close to the railway station) is the busiest bus stop area with 31 buses through every hour. The bus network is also supported by '*Fastrack*', which is a rapid bus transit throughout the northern part of Dartford and Gravesham Boroughs, linking existing and new communities to Dartford town centre, Darent Valley Hospital, Bluewater Ebbsfleet and Gravesend Town Centre.
- 5.48 Dartford is a major interchange station in the North Kent region and the modern new station opened in 2015. Train services from the station are operated by Southeastern and Thameslink, and Southeastern also manages the station. The station is a key junction for three main lines: the North Kent Line (via Woolwich Arsenal); the Bexleyheath Line; and the Dartford Loop Line (via Sidcup). Westbound services normally terminate at London Charing Cross, London Cannon Street (both via London Bridge) and London Victoria. The Thameslink trains connect Dartford with Luton and Bedford. Services from London also continue through Dartford to Greenhithe (for Bluewater) to

Gravesend, Strood, Rochester or Gillingham. Thameslink trains terminate at Rainham (see Figure 5.3).

Figure 5.3: London and the South East Rail Services - Dartford



Source: National Rail

- 5.49 The railway station is busy throughout the day and makes a significant contribution to the town centre's overall attraction and economy. The Oyster card scheme and contactless payment has further increased the attractiveness of the town for people wishing to re-locate from London. Official statistics⁴¹ indicate that annual rail passenger usage of the station increased from circa 3.02 million in 2013/14 to 4.62 million in 2018/19 (+53%); equivalent to circa 98,000 passengers per week. It is the busiest station in Kent, ahead of Tonbridge (4.55m) and Sevenoaks (4.4m). From 2017/18 to 2018/19 Dartford's passenger usage increased by 11% whereas other stations around Kent saw increases of around 3%-6%.
- 5.50 In the future there may also be potential to extend the Elizabeth Line (Crossrail 1) service east to Dartford or further east; at present it terminates at Abbey Wood.
- 5.51 Although the town's proximity to the strategic road network provides opportunities for growth, congestion in and around the town centre is an issue. The road network in the town centre is dominated by the ring road, which is also the only route for through traffic. It is also often used as an alternative route when there are problems on the A2 (T) or the A282 Dartford Tunnel Approach. Also, because the car dominates the town centre, it impacts on easy and safe movement for pedestrians and cyclists. In response, and as described in Section 2, the Council is rolling out a phased programme of public realm, highways management and traffic-calming initiatives across the town centre, beginning with Market Street (Brewery Square) and extending along the High Street to Hythe Street. For example, the Market Street works will provide an access from the new Acacia complex car park onto Darenth Road, thereby preventing the need for cars to move around the ring road and helping to reduce traffic along Market Street, and creating a direct pedestrian link to new car parking.
- 5.52 The Framework proposes measures to prioritise pedestrian and cycle movement across the town to help create a clearly defined, legible, safe and 'easy to use' pedestrian and cycle network. This, in turn, will help to "stitch together" different areas of the Town Centre, including the river corridor, with the High Street, Central Park, Lowfield St, the station and Northern Gateway. Aside from improvements to pedestrian and cycle routes, there is potential to provide new cycle hubs and secure stands to encourage cyclists to stop and dwell in the town centre for longer. Related to these

⁴¹ Sourced from Office of Rail and Road statistics. Annual estimated passenger usage based on sales of tickets in stated financial year(s) which end or originate at Swanscombe. Methodology may vary year on year.

improvements the Council has also installed new ‘Wayfinding’ signage in various locations across the town, with further signs to be provided in the near future.

CAR PARKING

- 5.53 There are approximately 4,000 parking spaces in the town centre, of which some 3,100 spaces are provided in 20 private and public owned car parks, with an additional 900 on-street bays⁴². The main Council-owned pay-and-display car parks are set out below.

Table 5.4: Council-owned car parks in Dartford Town Centre

Car Park	Number of Spaces	Car Park	Number of Spaces
Parking Eye Limited	699	Westgate	118
The Priory Centre	359	Overy Street (Rose)	41
Orchards Shopping Centre	253	Overy Street (Irish)	23
Meteor Parking	196	Overy Street (Rebore)	22
APCOA Car Park	154	Springvale	21

Source: Various

- 5.54 Parking provision is evenly distributed around the town centre. The key car parks that act as gateways into the town centre include Prospect Place, Westgate car park, the Orchard Shopping Centre, Market Street, Priory Shopping Centre and Acacia complex. The Framework reported that approximately 75% of parking visits were less than two hours long, based on evidence from pay-and-display ticket sales in 2015/16 for the Council-owned car parks. The Framework also identified that Acacia car park had the lowest usage, but other town centre car parks operate near capacity. The accessibility by car to Acacia parking is being significantly improved, and its onward pedestrian links to the town also. Many spaces in the edge of centre car parks are used by residents overnight and on Sundays, preventing use by visitors to the town centre. The various public realm and redevelopment proposals currently underway and/or planned for the town centre will also significantly improve the quality of Dartford’s overall parking offer. It will also result in a much cleaner, safer and simplified road layout, as well creating more attractive and connected public spaces in the heart of the town.

DIGITAL CONNECTIVITY & MARKETING

- 5.55 The Council’s 2018 Framework is clear that for the Town Centre to maintain its competitiveness, the strategy for driving local economic growth “*must embrace digital innovation as an opportunity and not a threat*”. Dartford is delivering an innovative and connected town centre through public Wi-Fi and Smart-Tech. There is further potential to support Government initiatives to roll out 5G. As reported in the Framework, this is helping to cross-promote shops and services, increase dwell times and ultimately support the experience of picking up ‘click-and-collect’ orders placed with online retailers. The same Wi-Fi system will also provide links to local community information providers, services and local media organisations. Local schools, churches and charities can provide information about fundraising events that normally could not be publicised to such a wide audience.
- 5.56 The Council is supporting these initiatives by seeking to deliver public spaces and land uses where these innovations can be utilised, and where people can adapt to new ways of using the town centre. The digital innovations can also be utilised to:

⁴² Dartford Town Centre Framework SPD (2018); paragraph 3.45

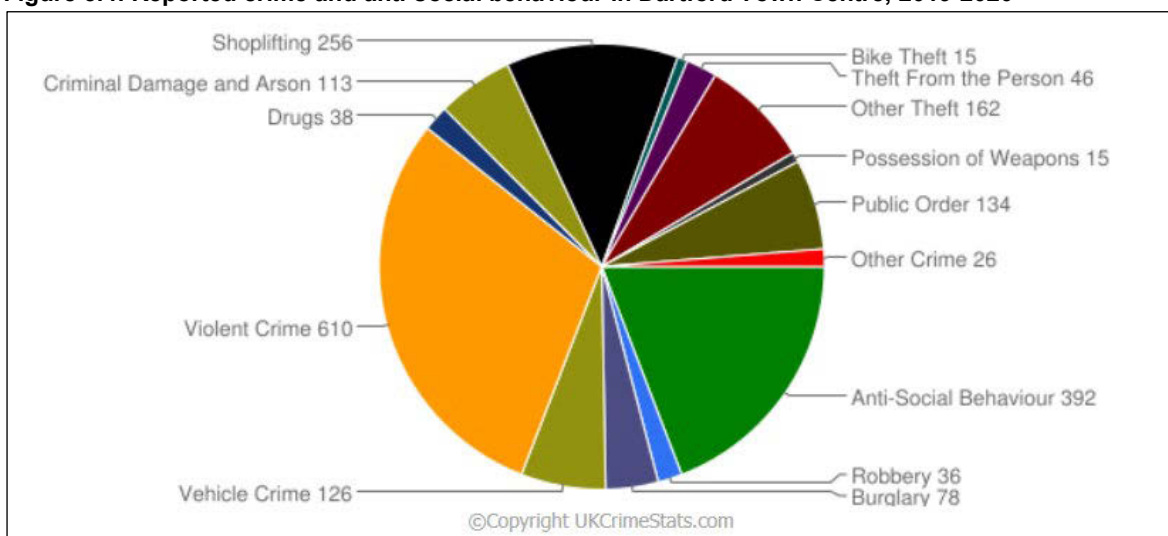
- improve integration between the town’s transport systems to provide ‘real time’ travel and parking information, and signpost walking and cycling routes;
- monitor the town centre footfall, bus congestion, car movements and journey times in order to inform decisions for future transport and public realm improvements; and
- support local SMEs, retail chains, market traders and public services to collaborate, using digital innovation to connect customers to the High Street and drive local economic growth.

5.57 This digital innovation is complemented by the ‘We Love Dartford’ social media site.

SAFETY & CRIME

5.58 The figure below shows the latest reported different incidents of crime and anti-social behaviour in Dartford Town Centre as reported by UKCrimeStats for the period March 2019 to February 2020.

Figure 5.4: Reported crime and anti-social behaviour in Dartford Town Centre, 2019-2020



5.59 The safest perceived areas in the Town Centre are generally the busiest streets/areas measured in terms of footfall and general activity. Those areas where the public realm and some shopfronts in secondary streets are in a poor state create a less welcoming and safe environment. This includes (for the moment) areas and streets close to the Station and along Lowfield Street, which is subject to redevelopment. According to the crime statistics map (Police.uk), the main hotspots for crime within Dartford town centre are the ‘pinch points’ where Market Street, High Street and Spital Street meet, and where drinkers tend to congregate when leaving pubs in the evening.

SUMMARY

5.60 In summary, the healthcheck has identified that Dartford Town Centre has several strengths that help to underpin its overall attraction, vitality and viability. These include its diverse mix of independent and multiple businesses, its street markets, the theatre and Central Park. Dartford’s strategic location and station are also major attractors for people that are looking to live within easy commutable distance of London and other areas. There are therefore significant opportunities to increase the mix and quality of town centre living, providing new residential uses either in, on “top of” or on the edge of the town centre to help increase Dartford’s “captive catchment” population and support existing and new businesses.

5.61 Dartford has also benefitted or is set to benefit from significant new investment and development. These include the new homes and mixed use development on the Lowfield Street site (aka

Copperhouse Green) and in the Northern Gateway regeneration area; the phased public realm works on Market Street (aka Brewery Square); the investment in Central Park and the planned transformation of the Acacia site; and the substantial investment in Fairfield Leisure Centre. In addition to these investments, the plans for the circa £100m regeneration of the town's Westgate area/former Co-op store would provide new residential units, a multi-screen cinema, hotel, and commercial units in the heart of the town centre.

5.62 Notwithstanding its attractions and strengths, and the recent positive (delivered and committed) investments in the Town Centre over recent years, Dartford also has a number of weaknesses. For example:

- it has an under-provision of food and convenience outlets compared with national figures;
- its comparison offer is falling, albeit in line with national trends;
- its retail offer is also predominantly value-led, which largely reflects the draw and impact of Bluewater as the major focus for high quality fashion and non-food retailing in the Borough;
- it also lacks a cinema and a mix of higher quality cafés, restaurants and bars that would help to strengthen its daytime economy and promote a more diverse evening economy, connected with the theatre and other attractions (although the plans for Westgate would help to address some of the 'gaps' in its cinema and wider commercial leisure provision); and
- like many other towns and shopping centres in the UK, Dartford is also facing threats from the predicted growth in online shopping and the impact of wider economic and retail trends, including COVID19, on household shopping and leisure preferences.

5.63 As described in Section 4, these market trends have had a significant impact on the UK's shopping centre sector over recent years, which have been further compounded by the impact of the pandemic and the series of lockdowns. Of Dartford's three shopping centres, Prospect Place is the most modern and provides the larger format units required by multiple retailers. However, both the Priors and Orchards Shopping Centres are dated by modern standards and would benefit from new investment in their environments and offer through repurposing and/or redevelopment.

5.64 The town is also facing sustained and increasing challenges from existing and planned centres, shopping and leisure destinations both within and outside the Borough. We review this nature and strength of these challenges in more detail in the following sections based on the results of the in-centre and household surveys.

6. DARTFORD TOWN CENTRE: STREET SURVEY

6.1 This section sets out the key headline findings of the face-to-face street interview surveys conducted in Dartford Town Centre in January/February 2020. These survey results supplement the health check and provide further robust evidence as to the relative attraction and performance of Dartford for those people who live, work, shop and use the town centre for a wide range of activities. It also highlights the strengths and attractions of competing shopping locations.

SURVEY METHOD

6.2 NEMS Market Research was commissioned to conduct an independent face-to-face survey amongst a sample of visitors to Dartford Town Centre to help inform the findings of the health check assessment. The interviews were conducted between Wednesday 29th January and Tuesday 11th February 2020 by trained professional interviewers. In total some 502 face-to-face interviews were carried out at different pre-determined locations across the Town Centre on different days of the week, as agreed with the Council.

Figure 6.1: Location of Interviews

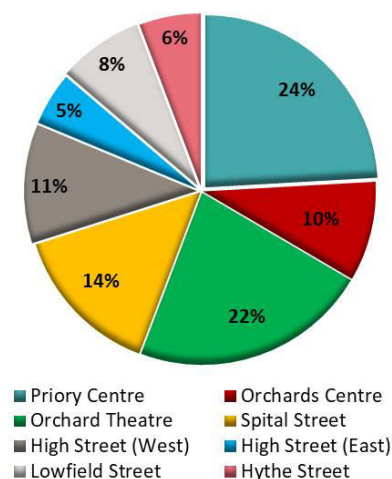
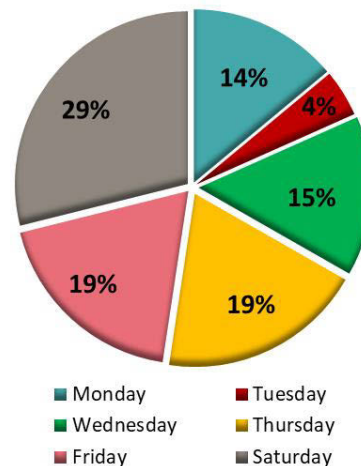


Figure 6.2: Days of week



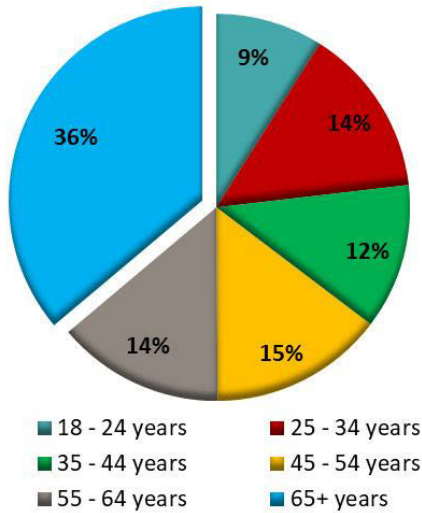
6.3 The main aims and objectives of the survey were wide-ranging and included identifying: (i) the main purpose for visiting the town centre on the day of their interview; (ii) what people “liked” and “disliked” about the centre; and (iii) what improvements, if any, would make them visit more often. The research method, survey questionnaire and detailed tabulations are set out in Appendix C to this study. The results have been cross-tabulated by each gender, age and socio-economic profile.

RESPONDENT PROFILE

6.4 Of the 502 people interviewed, 360 (71.7%) were female and 142 (28.3%) were male.

6.5 As Figure 6.3 shows, there was a relatively good distribution across the different age groups. Some 36% of respondents were aged 65 years or more, 9% were aged between 18-24 years and 14% were between 25-34 years. In general terms the older and younger age profiles have the highest disposable incomes.

Figure 6.3: Age Profile of Respondents



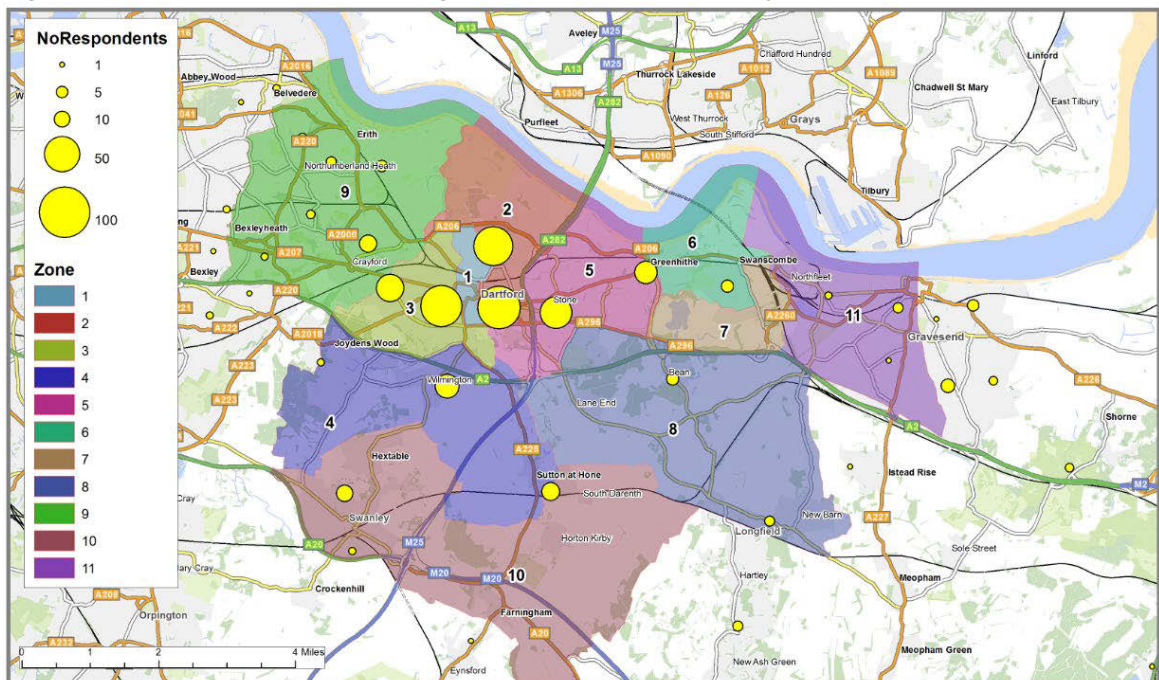
6.6 Of those interviewed approximately 61% owned at least one car and 39% did not own a car. Of the car owners, some 45% had one car, 14% had two and 2% owned three or more cars.

CATCHMENT & JOURNEY TIMES

6.7 The majority of respondents (94%) on the day they were interviewed had travelled to the Town Centre from their homes (question 5). A small proportion had travelled from work (3.6%), school (1%) or elsewhere (1.4%).

6.8 Dartford has a relatively localised catchment area. This is illustrated by the plan below, which shows the origins of visitors to the Town Centre on the days they were interviewed based on their postcode geography.

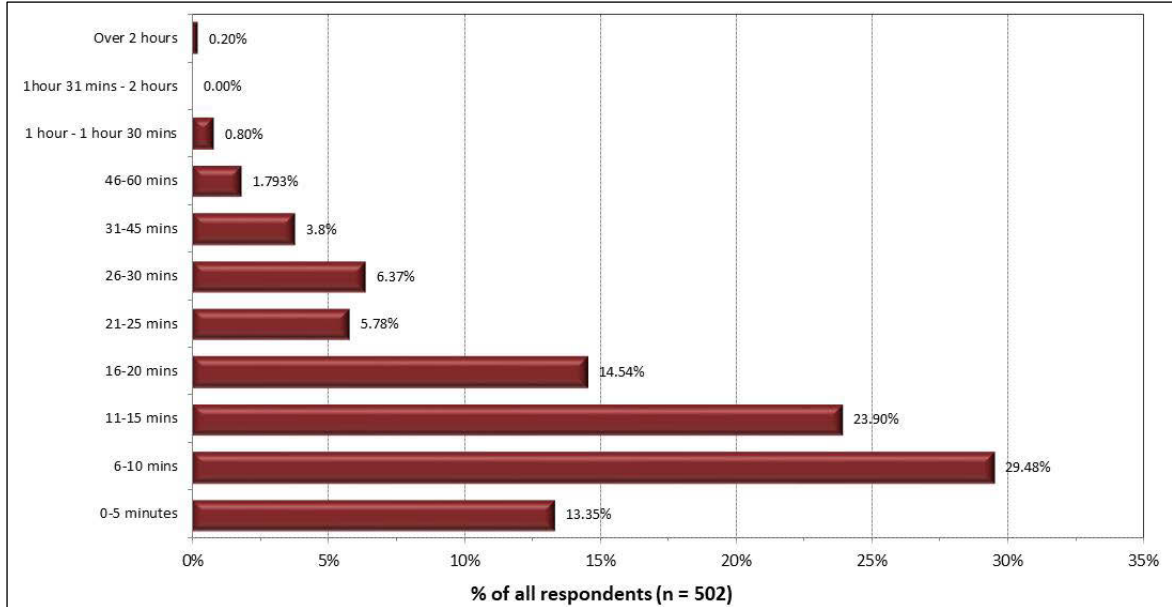
Figure 6.4: Dartford Town Centre – origins of respondents to survey



6.9 As the plan shows the majority of respondents live in Dartford Borough, and specifically in Zones 1, 2, 3 and 5 closest to the Town Centre.

6.10 The town’s local catchment is further confirmed by the relatively short average journey times to the Town Centre. In response to question 8, some 42.8% of respondents had journey times of up to ten minutes, and some two-thirds travelled 15 minutes or less.

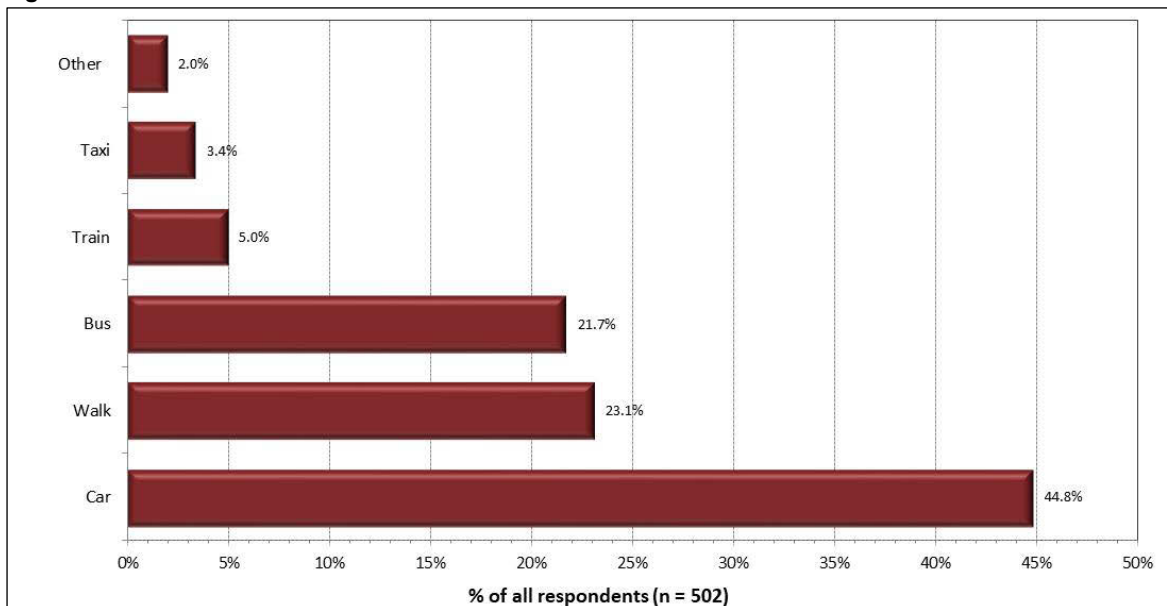
Figure 6.5: Travel/Journey Times



MODE OF TRAVEL

6.11 In response to question 7, 45% of those interviewed had travelled to the Town Centre by car. Of the remainder, some 23% walked and 21.7% travelled by bus. Others came by train on the day of the interview (5%), and a smaller proportion by taxi (3.4%) or other modes (e.g. bicycle, motorcycle, etc.).

Figure 6.6: Mode of Travel



MAIN CAR PARKS

6.12 Of the 44.8% (225 respondents) who travelled to Dartford by car (either as a driver or passenger), some 89.4% parked in the town centre’s main public and private car parks (question 9). The most popular car parks were:

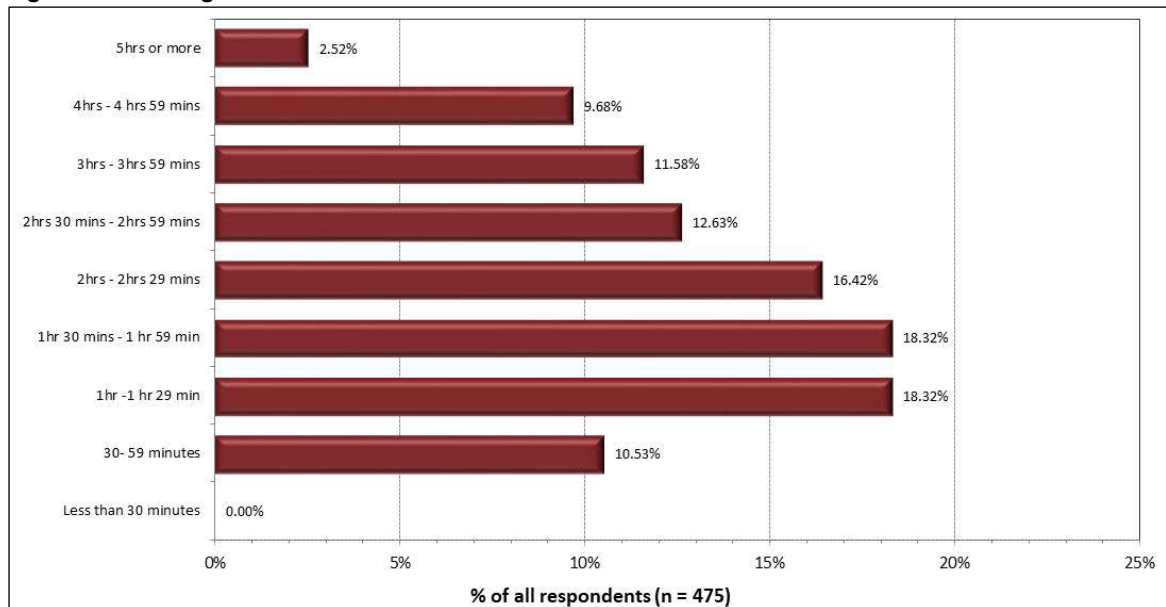
Sainsbury’s Car Park (23.4%)	Prospect Place (4%)
Priory Centre Car Park (22.9%)	Westgate Car Park (3.5%)
Orchards Shopping Centre Car Park (14.1%)	Train Station (1.8%)
Aldi Car Park (14.1%)	Overy Street Car Park (1.3%)

6.13 A small proportion (7%) also used on-street parking on the day they were interviewed. The most mentioned on-street car parks were Spital Street (2.2%), Market Street (1.3%) and Orchard Street (1.3%).

DWELL TIMES

6.14 The length of time that people stay in a town or shopping centre is commonly referred to as “*dwell time*”. It provides a good indication of the relative attraction and strength of the centre’s shopping, leisure and wider offer. It is generally the case that larger cities, towns and shopping centres with a diverse choice and mix of shops, leisure, workspace and other uses will generate longer dwell times than smaller centres. It also follows that if people spend a longer time in a centre then they will generally spend more money. The figure below shows the average dwell time of respondents to the street interview survey.

Figure 6.7: Average Dwell Times



Notes: Excludes 27 “null responses” (i.e. the “don’t knows”).

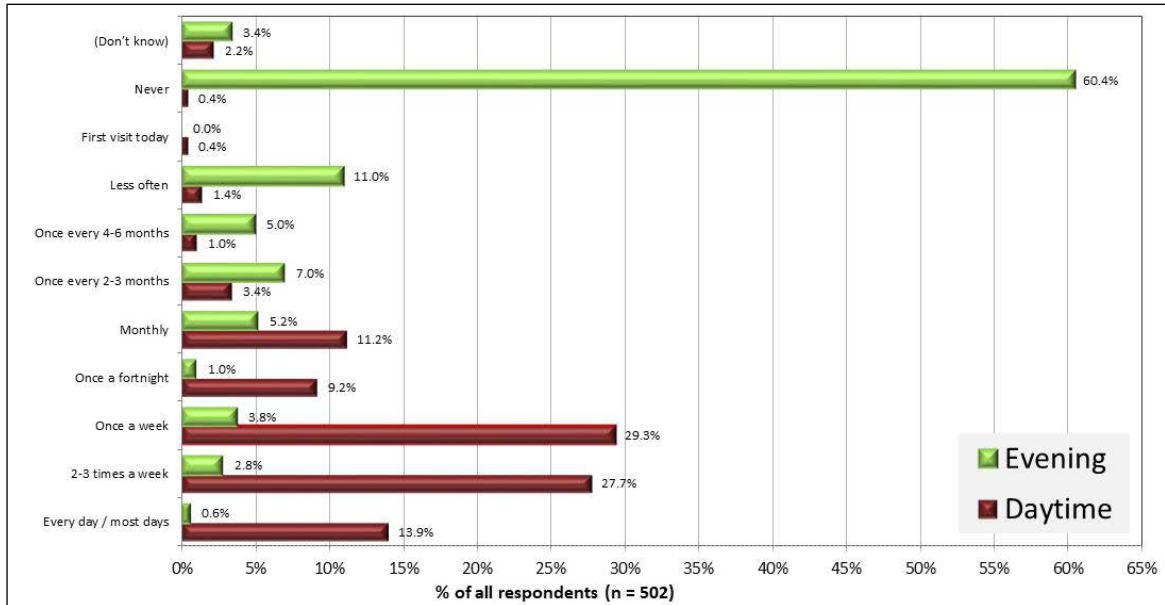
6.15 On average, one in ten (10.5%) respondents spent up to one hour in the Town Centre, 36.6% spent 1-2 hours and 29% spent 2-3 hours. A significant proportion (23.8%) also spent over three hours in the Town Centre.

6.16 In our experience the value in this key performance indicator – as for others – will be to carry out the street interview survey on a regular basis (i.e. annually) to help monitor the impact of new investment and regeneration schemes on Dartford Town Centre’s catchment, journey and dwell times, etc.

FREQUENCY OF TRIPS

6.17 Respondents were asked how often they visited Dartford Town Centre during the daytime and evenings/night-time. The figure below summarises the responses.

Figure 6.8: Frequency of Trips to Dartford Town Centre - Daytime and Evenings

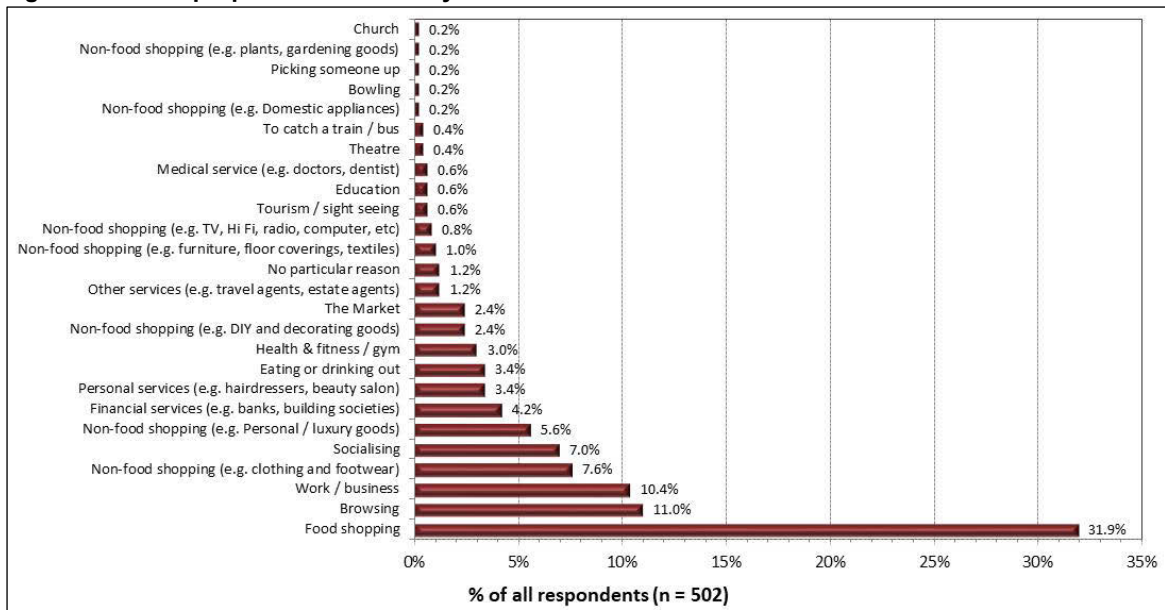


6.18 The figure shows the higher frequency of trips to Dartford during the day compared with evening visits. The results should be interpreted with caution, as it is generally the case that daytime street surveys can only provide a partial picture of actual evening trips and activity.. Notwithstanding this, some 71% of those interviewed visit the Town Centre at least once a week during the day and 42% visit at least twice a week. In comparison, only 7% of respondents visit the Town Centre in the evenings at least once a week. The majority (60.4%) never visit the Town Centre in the evenings. This suggests that there is potential to retain more daytime visitors and attract more people into Dartford during the early evenings and night-time.

WHY VISIT THE TOWN CENTRE?

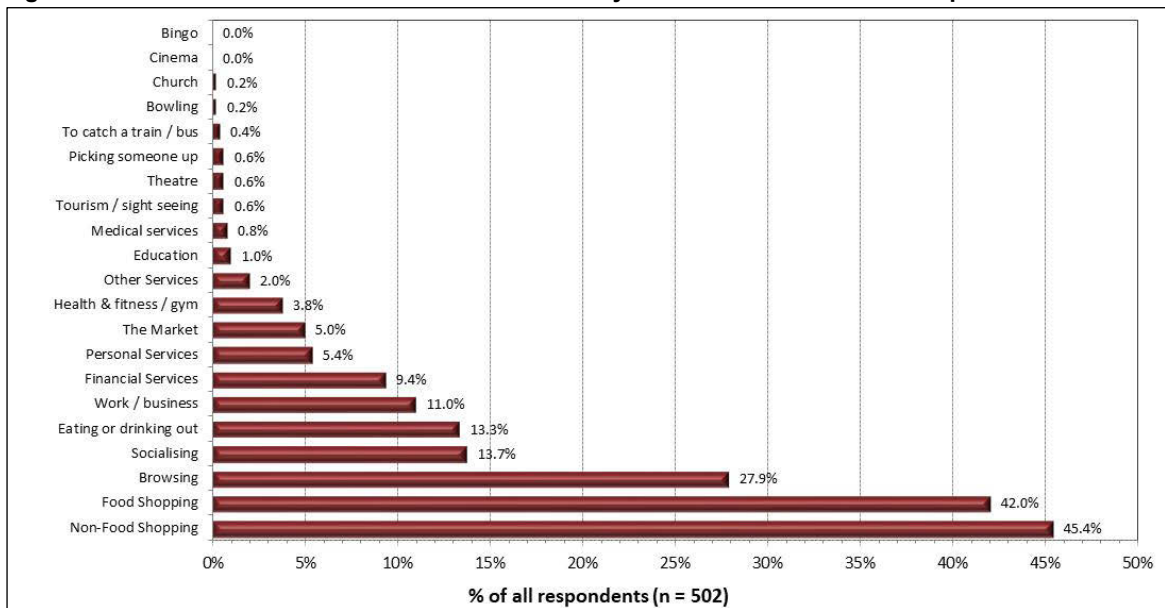
6.19 The survey asked respondents the main purpose of their visit to Dartford on the day of their interview (question 1), and whether there was any other reason for their visit (question 2). As the figure below shows, their main reasons for visiting were for food / grocery shopping (31.9%); browsing / window shopping (11%); work / business (10.4%); fashion (clothing and footwear) shopping (7.6%); and socialising (7%). A further 10.2% were also non-food shopping for other goods (e.g. DIY, electrical, furniture, household goods, etc.). The market was also identified by 2.4% of respondents as the main reason for their trip.

Figure 6.9: Main purpose of visit on day of interview



6.20 The figure below shows the combined response to questions 1 and 2. It confirms non-food and food shopping are the main “drivers” of trips, but that browsing, socialising, eating/drinking out and work / business reasons are also important reasons for visiting the Town Centre.

Figure 6.10: “Main” and “other” reason for visit on day of interview – combined responses

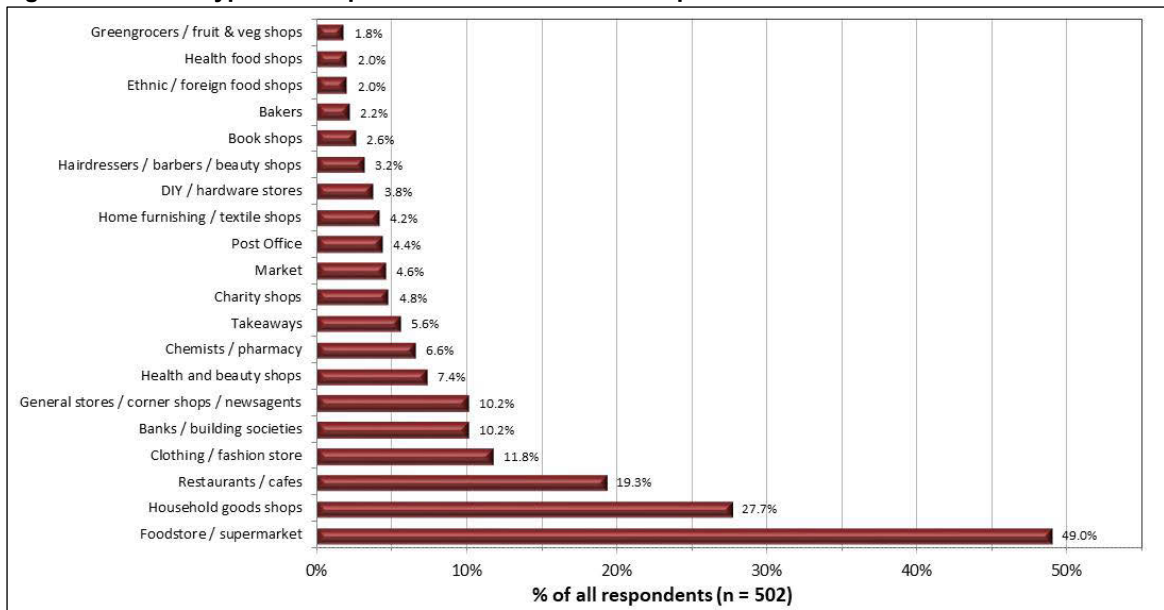


6.21 In summary, the responses confirm that although shopping is important to Dartford’s overall attraction, the town is also visited for a wide range of other uses and activities, including for work, socialising, eating and drinking out, and for health and fitness.

MAIN TYPES OF SHOPS & SERVICES VISITED

6.22 In response to question 12, almost half (49%) of those interviewed indicated that they were mainly visiting foodstores/supermarkets on the day of their visit. The other main types of shops and services visited included: household goods (27.7%) and clothing/footwear shops (11.8%); restaurants and cafés (19.3%); banks and building societies (10.2%); and general stores / newsagents / corners shops (10.2%).

Figure 6.11: Main types of shops and services visited on trip

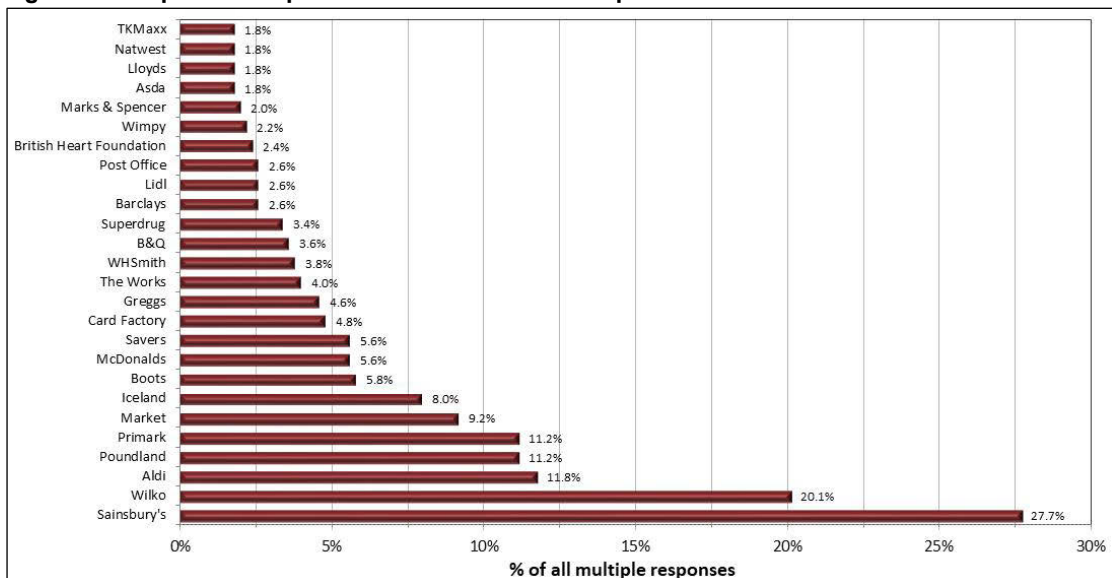


6.23 The responses also confirm the “long tail” of other shops and services visited on the day people were interviewed.

SPECIFIC SHOPS & SERVICES VISITED

6.24 Question 13 asked all those interviewed what specific shops and services they had visited or intended to visit on the day of their interview. As the figure below shows, some 27.7% identified Sainsbury’s, followed by Wilko (20.1%), Aldi (11.8%), Poundland (11.2%), Primark (11.2%), the Street Market (9.2%) and Iceland (8%).

Figure 6.12: Specific shops and services visited on trip

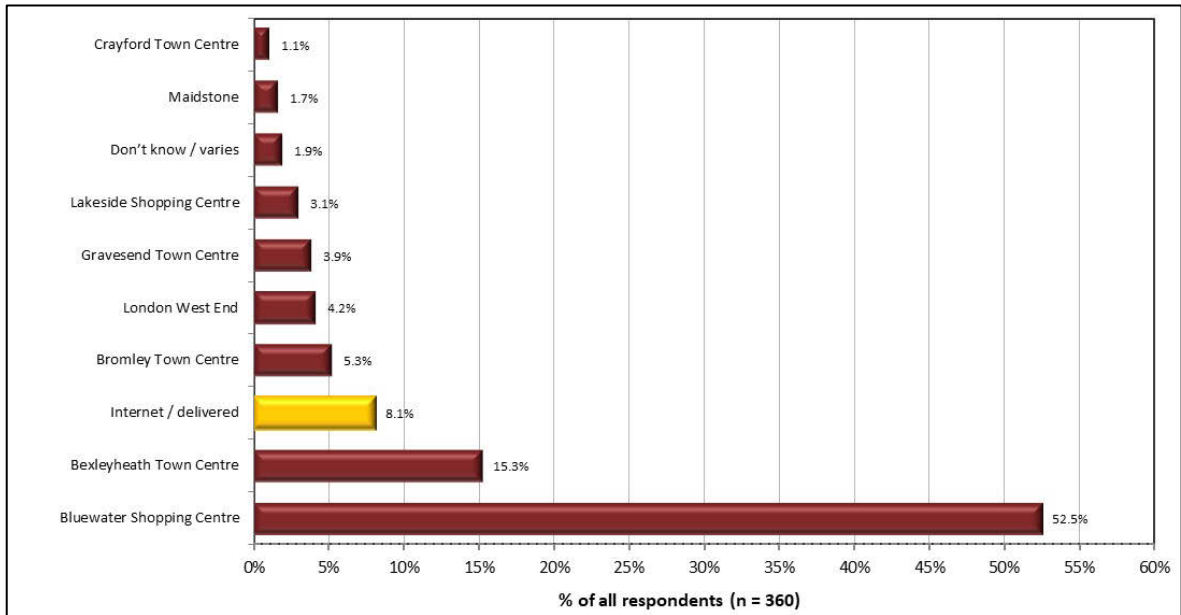


6.25 The town’s shops are clearly a major anchor and attraction to Dartford’s overall retail and service offer. McDonalds (5.6%), and Greggs (4.6%) are the most popular places for something to eat and drink. The Post Office/WH Smith (6.4%) and Barclays Bank (2.6%) are also important destinations.

IS DARTFORD THE FIRST CHOICE FOR COMPARISON SHOPPING?

6.26 Question 18 asked those interviewed whether Dartford was their first choice for clothing and footwear shopping, and other comparison goods purchases. In response some 28.3% (142 respondents) indicated that the Town Centre was their “first choice”. The figure below sets out the “first choice” shopping destination for the 72% (360 respondents) who do not shop in Dartford (question 19).

Figure 6.13: First choice shopping destination for respondents who do not shop in Dartford



6.27 In summary Bluewater is by far and away the most popular shopping destination, with over half of respondents (52.5%) indicating that it was their “*first choice*” for comparison goods shopping. Bexleyheath (15.3%) was the second most popular shopping destination, followed by online shopping (8.1%), Bromley Town Centre (5.3%), the West End (4.2%), Gravesend Town Centre (3.9%) and Lakeside (3.1%).

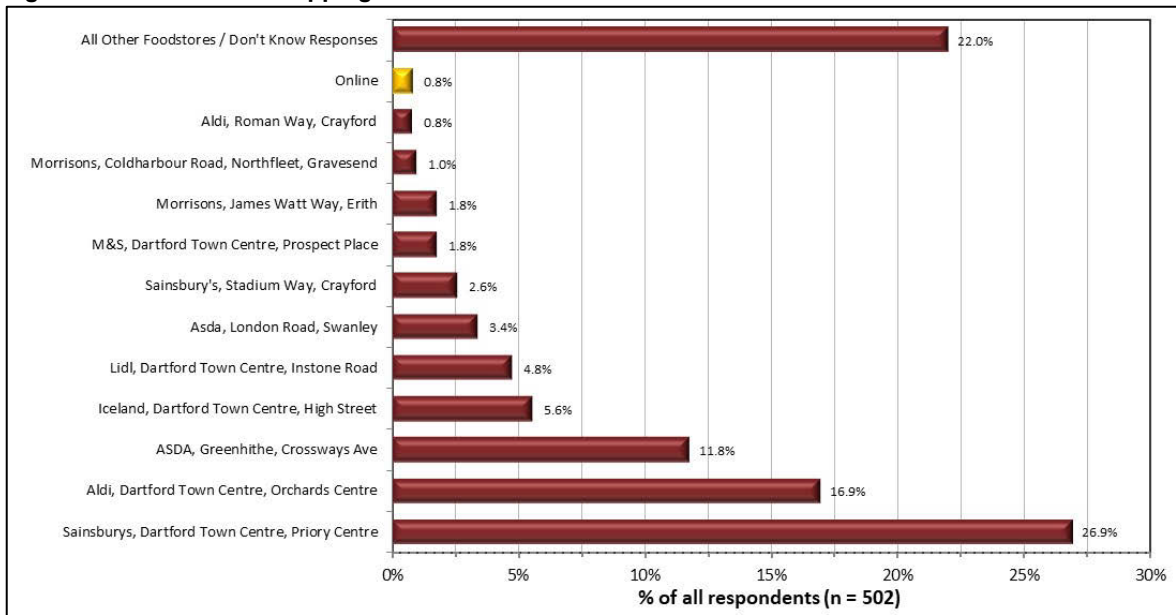
6.28 Question 20 asked the 28% (142 respondents) who identified Dartford as their “first choice” shopping destination which specific non-food shops they normally visit. Considered alongside the responses to question 13 above, the ‘top 10’ most popular non-food shops mentioned were:

Primark (59.2%)	Peacocks (29.6%)	Asda Living (27.5%)
Wilkinsons (54.9%)	TK Maxx (29.6%)	Card Factory (26.1%)
Poundland (46.5%)	Savers Ltd (28.9%)	Superdrug (23.9%)
Boots the Chemist (33.1%)		

WHERE DO PEOPLE NORMALLY CARRY OUT THEIR MAIN FOOD SHOP?

6.29 Question 14 asked those interviewed where they normally undertake their main weekly and/or fortnightly (“bulk”) food shopping purchases. The figure below sets out the main food shopping destinations, excluding the “*don't know*” and “*null*” responses (9.4% of respondents).

Figure 6.14: Main food shopping destinations

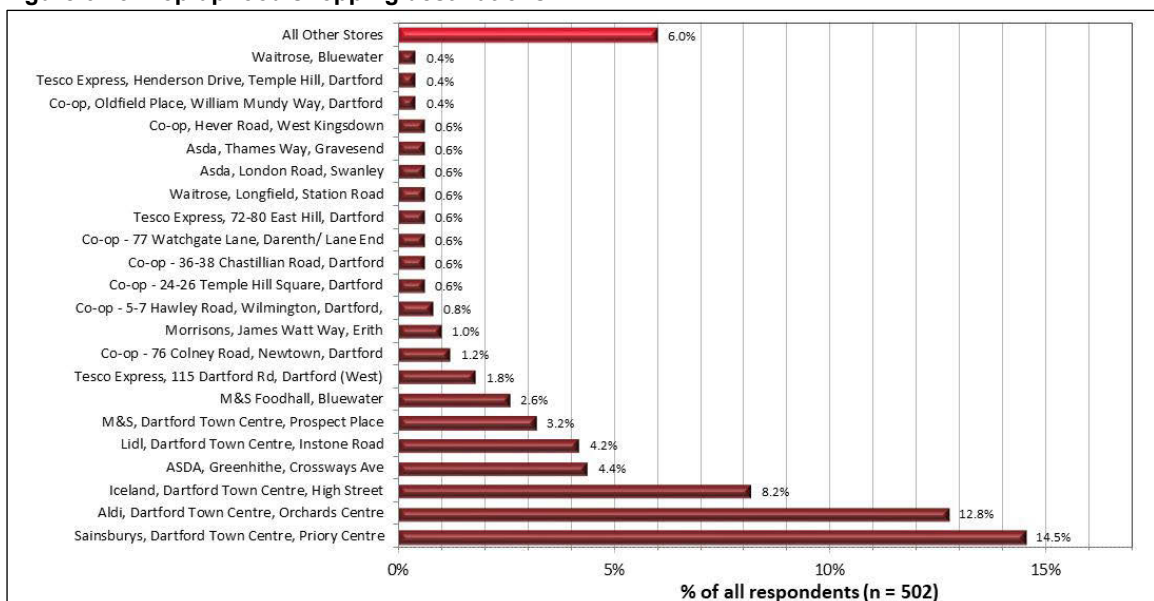


6.30 As the figure shows Sainsbury's (26.9%) and Aldi (16.9%) in Dartford Town Centre are the main foodstores visited by almost 44% of all respondents. Iceland (5.6%) and Lidl (4.8%) are also popular for main "bulk" food shopping purchases in the Town Centre, along with M&S in Prospect Place (1.8%). In total some 56% of those interviewed normally carry out their main food shopping in the Town Centre. Other popular foodstores include the out-of-centre Asda store in Greenhithe (11.8%), Asda in Swanley (3.4%) and Sainsbury's in Crayford (2.6%). Only a small proportion of those interviewed (0.8%) indicated that they do their main "bulk" food shopping online.

WHERE DO PEOPLE CARRY OUT THEIR "TOP-UP" FOOD SHOP?

6.31 Question 14 also asked where households normally undertake their more frequent, day-to-day "top-up" food shopping purchases. In response, some 16.5% indicated that they do not normally carry out "top-up" food shopping and a further 16.9% indicated they "didn't know" or it "varied". Excluding these responses, the figure below sets out the main "top-up" food shopping destinations for those interviewed.

Figure 6.15: Top-up food shopping destinations



6.32 In total Dartford Town Centre is achieving a 42.8% market share of “top-up” shopping trips. Sainsbury’s (14.5%) and Aldi (12.8%), Iceland (8.2%), Lidl (4.2%) and M&S (2.6%) are the most popular stores. “Top-up” purchases in these stores are most likely to be “linked” with other reasons for visiting Dartford (see below); for example, as part of wider shopping or leisure activities, or by those who work in and around the town centre. Other popular foodstores include the smaller food and convenience stores in the Borough’s District Centres, including Waitrose in Longfield, Co-op in Temple Hill and Tesco Express in Dartford West.

DO RESPONDENTS LINK THEIR FOOD SHOP WITH OTHER ACTIVITIES?

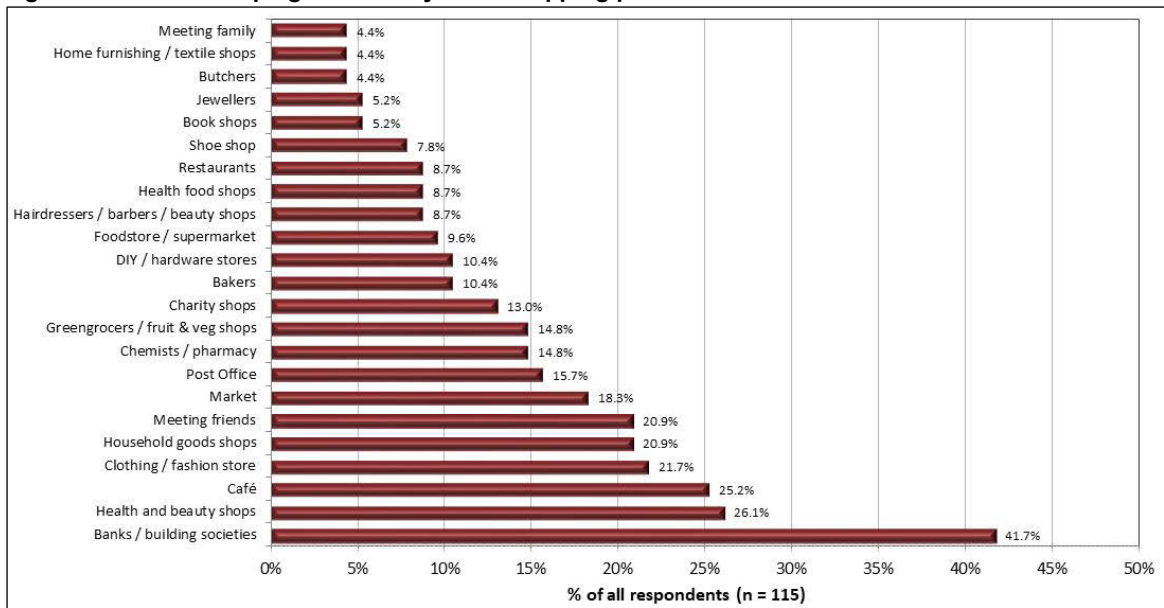
6.33 The responses to the street interview survey further underline the importance of food shopping and food stores to Dartford’s overall vitality and viability, helping to generate trips, footfall and turnover for the Town Centre. Foodstores also have an important “secondary” role inasmuch as they help to generate linked trips and expenditure to other stores and businesses as part of the same food shopping trips. These “linked trips” can also make a significant contribution to the overall vitality and viability of Town Centres such as Dartford.

6.34 To help explore and examine the potential importance and impact of “linked trips” for Dartford, question 16 asked those respondents who normally carry out their “main” and/or “top-up” food shopping purchases in the Town Centre whether they also normally combined this with trips to other shops and businesses. In response, 35.4% indicated that they normally carry out “linked trips”, 44% did not and the remaining 20.6% were either unsure or indicated that it varied. Although the propensity for linked trips will vary from store to store depending on their location and the strength of their pedestrian connections to other shops and stores in the town centre, we consider that a linked trip conversion rate of approximately one in three is relatively good, although there is clearly scope to increase the number of linked trips.

6.35 Further to this, the figure below shows the responses to question 17, which asked what shops, business and facilities the 35.4% (115 respondents) normally visited as part of their food shop.

6.36 The majority of respondents visit a bank or building society in the Town Centre (41.7%), followed by health and beauty shops (26.1%), cafés (25.3%) and a mixture of non-food shopping, principally for clothing and fashion (20.9%) and household (20.9%) goods. Visiting the market (18.3%) and post office (15.7%) were also significant, as well as socialising generally with friends and family, and visiting other smaller food and convenience stores.

Figure 6.16: Linked trips generated by food shopping purchases

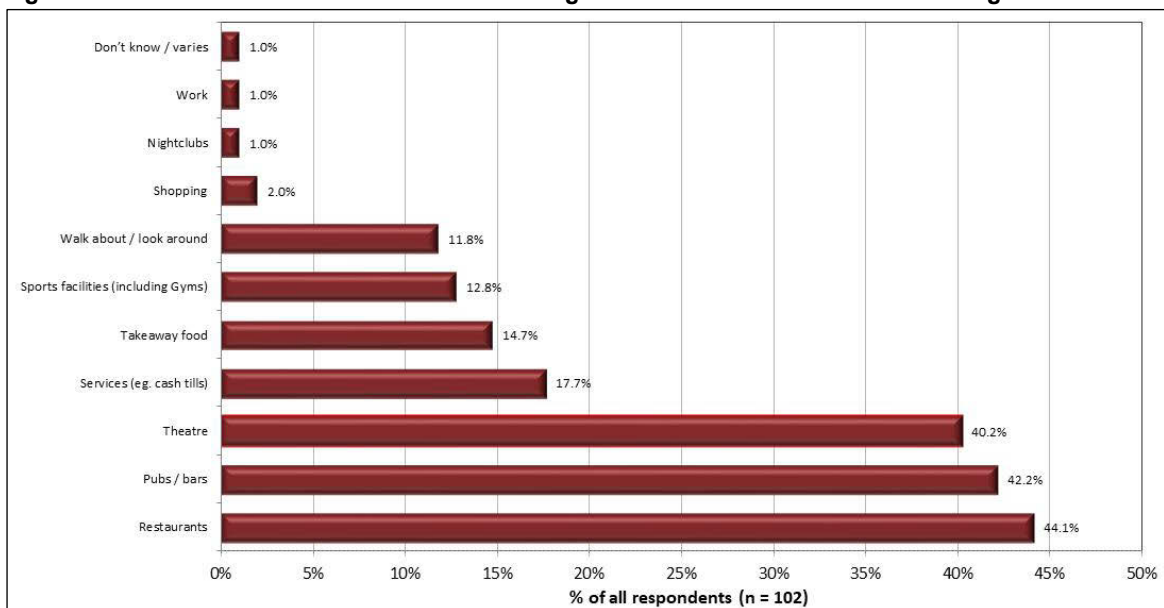


EVENING ECONOMY AND ATTRACTIONS

6.37 As described above, some 60.4% (303 respondents) of those interviewed indicated that they never visit Dartford Town Centre during the evening. Only 7.2% stated that they visit at least once a week, which compares with the 71% of respondents who regularly visit the Town Centre during the daytime. A further 6.2% visit at least once or twice a month, which compares with the 20.4% who visit the Town Centre during the daytime. Overall approximately one out of five respondents (20.3%) indicated that they visit the Town Centre in the evenings at least once every 2-3 months.

6.38 Question 24 specifically asked these people what are the main attractions and reasons for visiting? As the figure below shows the Town Centre's main attractions are its restaurants (44.1%), pubs and bars (42.2%) and the theatre (40.2%).

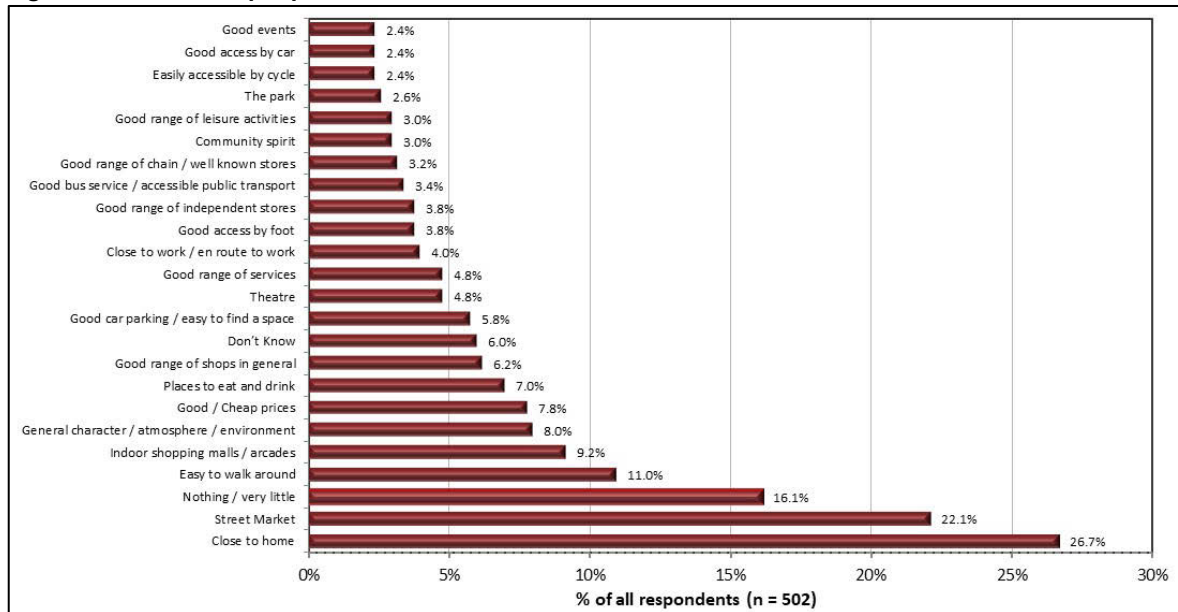
Figure 6.17: What are the main reasons for visiting Dartford Town Centre in the evenings?



WHAT DO PEOPLE LIKE ABOUT DARTFORD?

6.39 The figure below sets out the headline results of what people most “like” about Dartford Town Centre (question 25).

Figure 6.18: What do people like about Dartford Town Centre?



6.40 Aside from those that could think of “nothing/very little” they “liked” about the Town Centre, a significant proportion identified that it is close / convenient to where they either live (26.7%) or work (4%). A significant proportion of respondents (22.1%) also “liked” the Market and the shopping malls (9.2%). The other most mentioned responses included:

- **Environment:** the fact that the centre is compact and “easy to walk around” (11%), and has a good “general character / atmosphere” (8%).
- **Shops and services:** the “good range” of shops generally and services was also mentioned by a total of 11% of respondents. A further 7% (total) liked the range of independents and chain stores
- **Theatre:** identified by 4.8% of respondents.
- **Places to eat and drink:** restaurants, cafés and pubs/bars were mentioned by 7% of all respondents.
- **Good access:** by foot (3.8%), bus (3.4%), car (2.4%) and bicycle (2.4%).
- **Car parking:** 4.8% also identified the town has good car parking provision and it was easy to find a parking space, and 2.4% indicated there was good access by car.

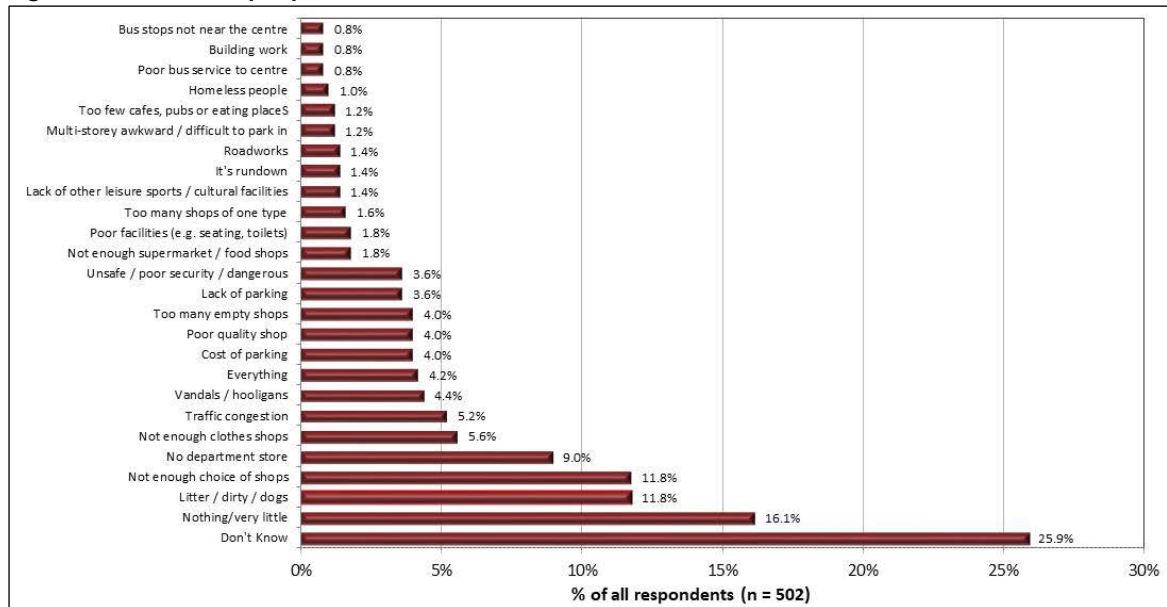
WHAT DO PEOPLE DISLIKE ABOUT DARTFORD?

6.41 The figure below sets out what people “dislike” about Dartford Town Centre (question 26). In summary, 25.9% of respondents answered that there was “nothing/very little” they disliked, and a further 16.1% “didn’t know”. Of the remainder, the main “dislikes” included:

- **Shops:** A significant proportion mentioned that there were not enough shops (11.8%), no department store (9%) and not enough clothes shops (5.6%). Others identified that there were too many empty shops (4%), “poor quality shops” (4%) and too many shops “of one type” (1.6%).

- **Traffic congestion and parking:** The cost and general lack of parking was mentioned by 4% and 3.6% of respondents respectively. Some 5.2% also identified traffic congestion across the Town Centre.
- **Environment:** some 11.8% identified problems with litter and a “dirty” environment, “vandals / hooligans” (4.4%), issues with safety/security (3.6%) and a lack of facilities (1.8%). 1.4% also indicated the centre was “rundown”.

Figure 6.19: What do people dislike about Dartford Town Centre?

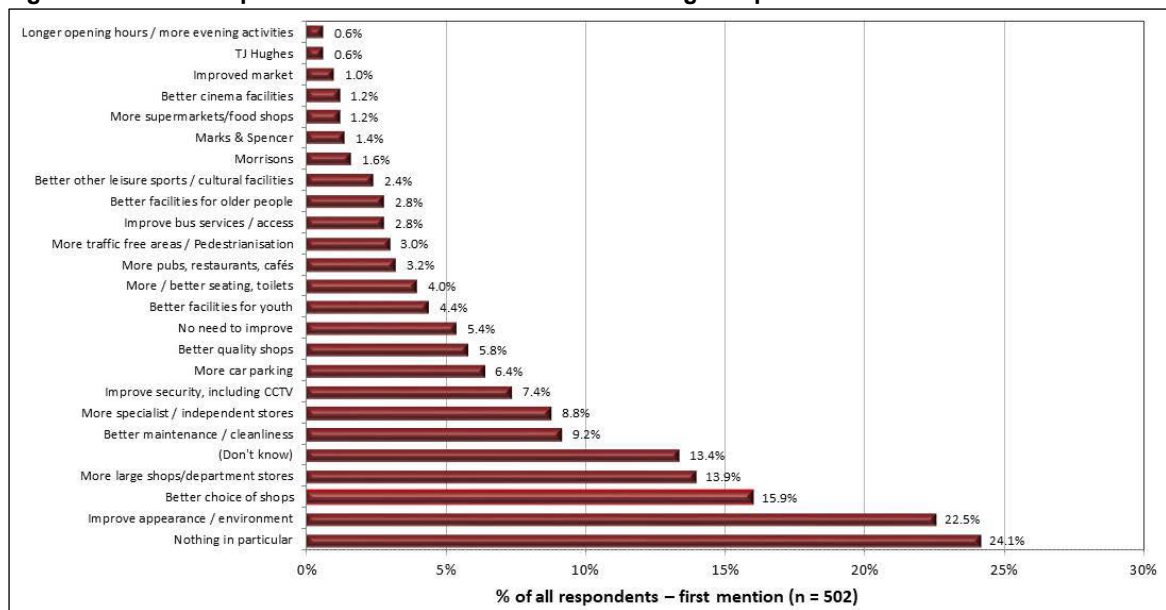


WHAT IMPROVEMENTS COULD MAKE PEOPLE VISIT MORE OFTEN

- 6.42 Question 27 asked those interviewed what three improvements to the Town Centre would make them visit more often than they currently do.
- 6.43 In response, a high proportion of respondents could not think of anything in particular that would make them visit more often. For example, for their first response some 22.5% indicated that there was “nothing in particular” and a further 8% indicated they “did not know”.
- 6.44 The figure below shows the first improvement mentioned by respondents when questioned.
- 6.45 The main “improvements” identified are:

- **Environment:** improvements to the town centre’s appearance/environment (22.5%) was the main response. Other related improvements included mentions for better maintenance/cleanliness (9.2%), more/better seating/toilets (4%) and more traffic-free areas/pedestrianisation (3%).
- **Shops:** A better choice of shops (15.9%), more large shops/department stores (13.9%), more specialist/independent stores (8.8%), better quality shops (5.8%) and more supermarkets/food stores (1.2%). A number of respondents also mentioned specific retailers, including Morrisons (1.6%) and Marks and Spencer (1.4%).
- **Parking:** more parking (6.4%) was the most mentioned improvement, with a smaller proportion identifying the need for free/cheaper parking (0.4%).

Figure 6.20: What improvements to Dartford would encourage respondents to visit more often?



- **Leisure and Evening Economy:** more cafés/pubs/restaurants (3.2%), a cinema (1.2%), better other leisure, sports and cultural activities (2.4%) and longer opening hours and more evening activities (0.6%).
- **Security and Signage:** 7.4% mentioned the need for improvements to security (including CCTV).
- **Other:** included better facilities for the young (4.4%) and older people (1.5%)

6.46 Overall, in response to question 27 (i.e. either as their first, second or third answer) those interviewed generally identified that more and better shops (both multiples and independents) and improvements to the town centre’s appearance and environment could potentially encourage them to visit the Town Centre more often than they currently do.

SUMMARY

6.47 In summary, the in-centre survey results show:

- Dartford has a relatively localised catchment, with approximately two-thirds of respondents travelling 15 minutes or less to the town centre on the day they were interviewed.
- Although the majority travelled to the centre by car, a high proportion also walked or came by bus.
- For those travelling by car the majority (46.3%) chose to park in the Priory or Orchards shopping centres, or in the Aldi (14.1%) and Sainsbury’s (23.4%) car parks.
- The majority (36.6%) of respondents were spent between 1-2 hours in the town centre, with a further 29% spending between 2-3 hours.
- Dartford is attracting frequent daytime trips – 71% of those interviewed visited at least once a week – but this is not translating into evening trips.
- Those who do visit in the town in the evening are attracted by the restaurants, bars and theatre.
- The main reason people visit Dartford is for shopping, and particularly for food purchases.
- Sainsbury’s and Aldi are the main shops visited. Wilko, Poundland, Primark and the market are also popular.

- Bluewater is the most popular shopping destination, with over half of respondents (52.5%) indicating that it was their “*first choice*” for comparison goods shopping. Bexleyheath (15.3%) was the second most popular, followed by online shopping (8.1%), Bromley Town Centre (5.3%), the West End (4.2%), Gravesend Town Centre (3.9%) and Lakeside (3.1%).
- Some 35.4% link their food shopping with trips to other shops, services and facilities. Although this is a relatively good conversion rate, there is scope to increase the number of linked trips.
- When asked what they most “*like*” about the town centre, the majority indicated that it was close/ convenient to where they live and work (31.7%), and they also “*liked*” the market and shopping malls.
- In terms of what they “*disliked*”, the majority (42%) could not identify anything. Of the remainder, the “*dislikes*” were focussed on the lack of shops and poor quality shops, traffic congestion and lack of parking, and the fact that the town centre environment was “*dirty*” or “*unsafe*” in their view.
- Although the majority (30.5%) of respondents could not think of any improvements to the town centre that would make them visit more often, others mentioned the need for improvements to the environment, more/better quality shops and more/cheaper parking.

7. DISTRICT CENTRES: HEALTHCHECK

- 7.1 As described in Section 2 there is a defined network of six District Centres and sixteen Neighbourhood Centres across the Borough that serve the wider more frequent shopping, service, health, leisure and community needs of their more local resident catchment populations. As the DDPP states (paragraph 12.47) these centres are important as they help to create a: “...sense of place and social cohesion of local communities, and help to reduce car dependency by providing services close to homes”⁴³.
- 7.2 The six defined District Centres function as important community hubs, accessible by public transport and centrally located within residential areas or at prominent points like main roads. They provide a range of retail uses such as local supermarkets and pharmacies, as well as food and drink premises. They also include community facilities that draw people in, such as libraries, doctor’s surgeries and/or schools.
- 7.3 The sixteen defined Neighbourhood Centres differ in terms of their scale, offer, roles and function. In general terms they can be characterised as small shopping parades, or clusters of local commercial services which provide walkable provision for the day-to-day needs of communities. In these locations diversification is generally appropriate, but a convenience retail role is important for more frequent “top-up” food and convenience purchases.
- 7.4 This section focuses on the relative health and performance of the District Centres only, as the Council’s brief did not cover an assessment of the smaller, lower tier, Neighbourhood Centres.

DIVERSITY OF USES

- 7.5 The table below shows the number and diversity of uses across the Borough’s six main District Centres based on the latest audit conducted by the Council in May 2019.

Table 7.1: District Centres – Diversity of Outlets by Use Class (May 2019)

	LONGFIELD		HIGH STREET - SWANSCOMBE		DARTFORD EAST		DARTFORD WEST		TEMPLE HILL		HAWLEY ROAD		TOTAL	AVERAGE
A1 - Convenience Goods	5	10.6%	2	6.3%	2	9.5%	2	8.0%	4	21.1%	2	11.1%	17	10.5%
A1 - Comparison Goods	7	14.9%	5	15.6%	2	9.5%	2	8.0%	2	10.5%			18	11.1%
A1 - Retail Service	13	27.7%	8	25.0%	6	28.6%	7	28.0%	5	26.3%	4	22.2%	43	26.5%
A2 - Financial and Professional Services	6	12.8%	5	15.6%	2	9.5%							13	8.0%
A3 - Cafés and Restaurants	4	8.5%	2	6.3%					1	5.3%	1	5.6%	8	4.9%
A4 - Drinking Establishments	1	2.1%	1	3.1%	1	4.8%	2	8.0%			2	11.1%	7	4.3%
A5 - Takeaways	6	12.8%	3	9.4%	3	14.3%	6	24.0%	2	10.5%	3	16.7%	23	14.2%
CLASS A USES ONLY - SUB TOTAL:	42	89.4%	26	81.3%	16	76.2%	19	76.0%	14	73.7%	12	66.7%	129	79.6%
B1 - Business / Offices					1	4.8%	1	4.0%					2	1.2%
C1 - Hotels														
D1 - Non-residential Institutions	1	2.1%	3	9.4%	1	4.8%	2	8.0%	2	10.5%	3	16.7%	12	7.4%
D2 - Assembly & Leisure														
SG - Sui Generis			2	6.3%	2	9.5%	3	12.0%	3	15.8%	3	16.7%	13	8.0%
Vacant	1	2.1%	1	3.1%	1	4.8%							3	1.9%
Other	3	6.4%											3	1.9%
TOTAL:	47	100.0%	32	100.0%	21	100.0%	25	100.0%	19	100.0%	18	100.0%	162	100.0%

Source: Dartford Borough Council⁴⁴.

- 7.6 The main headlines are:

⁴³ DBC (2016) Local Shopping Report 2015/16. See Chapter 4

⁴⁴ The table show outlets only and not frontages. For example, one outlet may extend across a number of frontages as measured by the Council in their audits. The table also excludes Class C3 – Dwelling Houses. It should be noted that Dartford East (11), Swanscombe (7) and Dartford West (5) had the most dwelling houses within their defined frontages.

- Longfield is the largest District Centre in the Borough (47 outlets) and Hawley Road/Lowfield Street District Centre is the smallest (18).
- Longfield also has the most Class A outlets (42) and Hawley Road has the fewest (12).
- Longfield also has the highest representation of Class A uses (just over 89%) as a proportion of its total outlets, and Hawley Road has the lowest representation (66.7%).
- Longfield has the most food/convenience goods outlets of all the District Centres (5), followed by Temple Hill Square (4). The other District Centres all have two each.
- Longfield has the most Class A1 (Retail Services), Class A2 (Financial and Professional Services), Class A3 (Cafés and Restaurants) and Class A5 (Takeaways).
- Hawley Road does not have any comparison goods outlets.
- Dartford West, Temple Hill and Hawley Road do not have any Class A2 uses.
- Dartford West and Dartford East do not have any Class A3 uses, as defined by the Council.
- Temple Hill does not have any Class A4 uses.
- All the District Centres either have no vacancies (Temple Hill, Dartford East and Hawley Road), or just one vacancy (Longfield, Swanscombe and Dartford West).

7.7 The following provides an overview of the strengths and weaknesses in the shopping, leisure and overall offer of the main District Centres.

LONGFIELD

7.8 Longfield has a good number and diversity of uses. The centre is located some six miles (10 km) south-east of Dartford on the edge of the Borough, and six miles to the south-west of Gravesend. It was identified as the first District Centre in the Core Strategy and serves the needs of residents in several surrounding villages both within and outside Dartford Borough.

7.9 The centre's shops, services and other main facilities are located along Station Road, at the junction with Main Road to the north and the station to the South. The frontages are shown on the Policies Map and this has been reproduced below for ease of reference⁴⁵.

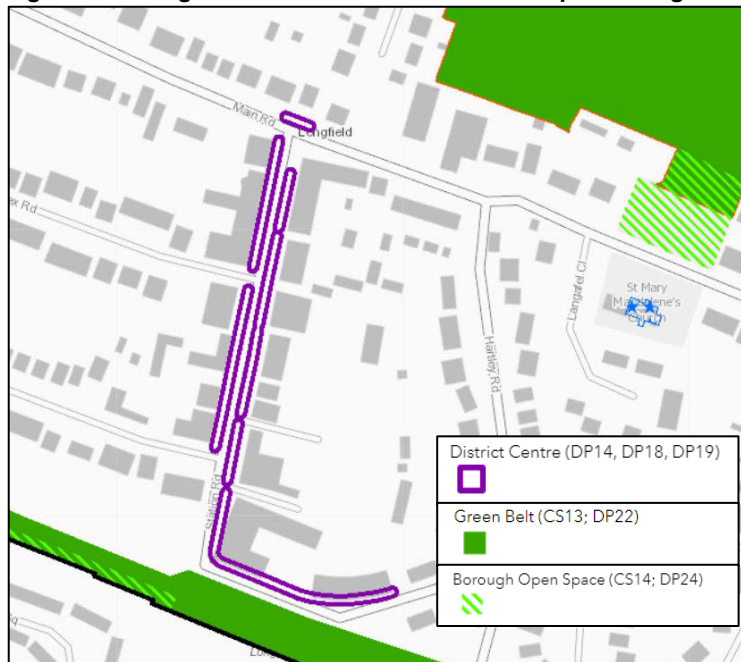
7.10 The specific streets and addresses identified on the Policies Map are:

5–65 Station Road
2–36 Station Road

83–97 Station Road
48 Main Road

⁴⁵ Frontage policy includes the full site boundaries fronting the highway, even if the shop is set well back or the site not in current shop/services use.

Figure 7.1: Longfield District Centre: Policies Map - Frontages



Source: Dartford Borough Council. ©Crown Copyright and database right 2019

7.11 As Table 7.1 shows, there are some 47 outlets in the District Centre, of which 42 (89.4%) are defined as being in Class A use. In summary:

- Waitrose anchors the centre's food and convenience offer at 63 Station Road. The store is served by a car park that offers 2-hours free parking.
- There are four other smaller convenience goods outlets; namely a Co-op convenience store, off licence, butchers (Boyson) and bakers (Henry's).
- There are 7 comparison goods outlets including: Ash Carpet Centre, Family Kitchens and Longfield Hardware.
- There is a strong representation of Class A1 retail services, with 12 recorded businesses. These include a post office, dry cleaners, travel agency, pharmacy, hairdressers, barbers and opticians.
- The centre also has a relatively good provision of mainly independent Class A3-A5 uses, including a mix of Indian restaurants, cafés and take-aways. There is a Domino's pizza takeaway in the centre, which is the only national multiple. The Railway Tavern is the only public house in the defined frontage area.
- Longfield also has a library, doctor's surgery and vets.

7.12 According to the Council's figures there was only one recorded vacant outlet in the centre. Vacancy levels in the centre have been consistently low since 2015.

7.13 Just outside the defined centre on the Main Road is St Mary Magdalene's Church, which was built in 1343 and is a Grade II* listed building.

7.14 The District Centre benefits from good accessibility by all modes of travel. It is within relatively easy and convenient walking distance for its local residents. For those travelling longer distances it is served by a railway station operated by Southeastern with three trains per hour running during the week to London Victoria (via Bromley South), two trains per hour to Dover Priory and one train per hour to Ramsgate. The station is served by an 88-space car park located to the south of the railway line off Park Drive. At the time of finalising this study the daily parking charges were £4.90. Official

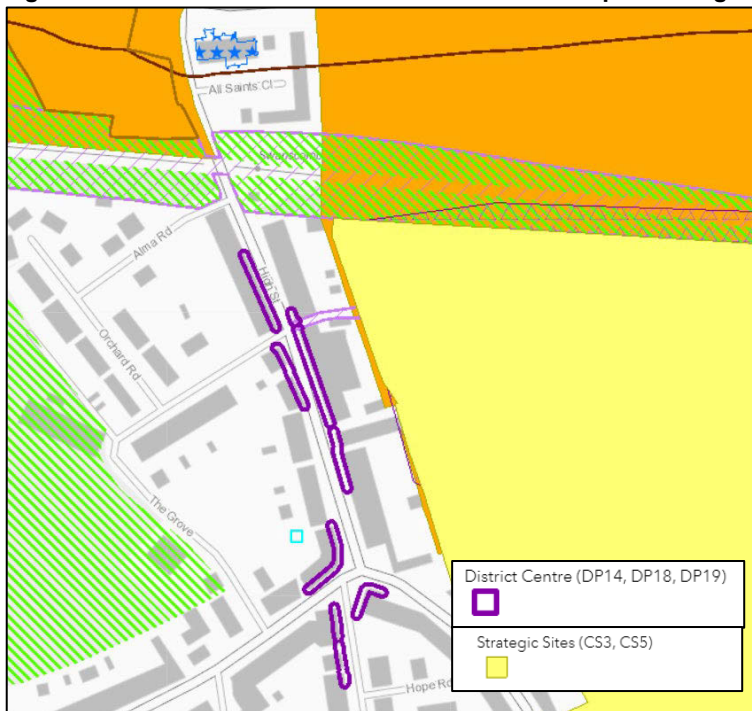
statistics⁴⁶ indicate that the annual passenger usage has increased from circa 565,000 in 2013/14 to 605,000 in 2017/18 (+7%). It follows that the pedestrian footfall generated by the train station benefits the centre's existing shops, business and facilities through linked trips and expenditure.

- 7.15 There are also a number of regular bus routes that provide connections to Dartford, Bluewater and Greenhithe (numbers 423, 433, 474, 475 and 489).
- 7.16 In our judgement the overall environment is good, but it would benefit from investment in the public realm, pavement and frontages along the length of Station Road.
- 7.17 The Core Strategy (paragraph 3.32) identified that the centre appears to be performing well, and its continuing viability "*will enable rural residents to meet their daily and weekly shopping needs close to home*".

HIGH STREET SWANSCOMBE

- 7.18 Swanscombe is located some 5 miles east of Dartford Town Centre, 4 miles north-west of Gravesend and 3 miles east of Bluewater within the civil parish of Swanscombe and Greenhithe.
- 7.19 Its main shops, services and other facilities are situated along its linear high street. The extent of the defined frontages are shown on the Policies Map and this has been reproduced below for ease of reference.

Figure 7.2: Swanscombe District Centre: Policies Map - Frontages



7.20 The specific streets and addresses identified on the Policies Map are:

- | | |
|-------------------------------|--|
| 1-6 The Parade High Street | 23-57 High Street |
| 40-58 High Street | The Old Fire Station & Church Road Hall, Church Road |
| Methodist Chapel, Milton Road | 2-4 Stanhope Road |

⁴⁶ Source: Office of Rail and Road statistics. Annual estimated passenger usage based on sales of tickets in stated financial year(s) which end or originate at Longfield. Please note that the methodology may vary year on year.

- 7.21 As Table 7.1 shows, Swanscombe High Street has 32 outlets and is the second largest District Centre after Longfield. Some 26 (81%) of outlets recorded by the Council are defined as being in Class A use. The key mix of uses include:
- **Two food and convenience outlets:** namely a Co-op supermarket (including a post office counter) at 29-35 High Street and an off licence at 62 High Street. These two outlets represent 6.3% of total outlets in the centre, which is below the average for all the District Centres of 10.5%. This suggests that there is an under-provision of food and convenience outlets in the centre.
 - **Five comparison goods outlets:** including a charity and pet shop.
 - **Eight retail services:** half of these (4 outlets) are hairdressers. The other services include a laundrette and dry cleaners.
 - **Two cafés** (Lil's and Fire Station), one public house (The Wheatsheaf) and three take-aways (Fish Bar, Best Kebab and Peking Palace).
- 7.22 Within the centre's defined frontages there is also a dental surgery (23 High Street). There is no doctor's surgery or library. The Methodist Church and Church Hall on Church Road form an important part of the District Centre's offer.
- 7.23 According to the Council's figures there was only one vacant outlet in the centre at May 2019. This unit at 45 High Street has been vacant since circa 2016/17 and was previously occupied by Vikoy Computer Repair Shop.
- 7.24 The centre's economy benefits from the Swanscombe railway station located to the north of the High Street, which is operated by Southeastern and Thameslink. Trains run through the day to Charing Cross (via Sidcup), Luton (via St Pancras), Gravesend and Rainham. Official statistics⁴⁷ indicated that annual rail passenger usage of the station increased from approximately 143,000 in 2013/14 to 176,000 in 2017/18 (+23%).
- 7.25 In terms of its accessibility and parking, the High Street is single carriageway with limited on-street parking. This results in congestion at peak period along the length of the High Street. As a result the Grove Car Park is an important car park serving the High Street, providing circa 75 parking spaces. However it has been operating at full capacity for a number of years due to the attraction of free parking for commuters and other users. In an attempt to manage the situation for the whole community and to try and deter commuter parking and increase the opportunity for users of the shops the Town Council tested a Pay-and-Display Scheme during 2018/19. The trial allowed for two hours free parking, a £2 charge for the next 2-4 hours and no parking after 4 hours. All monies from the car park will be used to maintain the facility and to cover the cost of the management and enforcement of the parking. The options for the future management and operation of Grove Car Park are currently under review following the results of the trial.
- 7.26 In our judgement the overall High Street environment is unattractive. It is characterised by poor shop frontages, a number of which are shuttered during the daytime creating "dead frontages". The High Street's offer is also "broken up" by residential dwellings along its length. The public realm and street paving is also poor, and there is limited street furniture. It lacks pavements on both sides for part of its length, with a particular "pinch point" at the railway bridge. Access from rail services to the town is also hindered by platform access within the station only being possible via long flights of stairs.

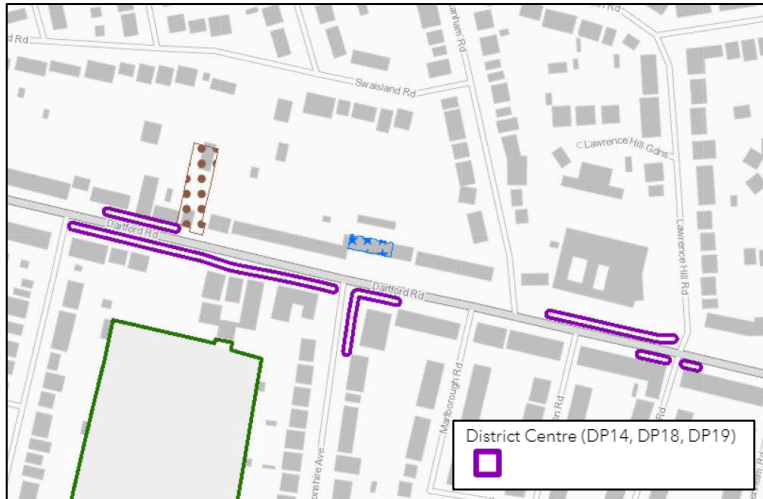
⁴⁷ Sourced from Office of Rail and Road statistics. Annual estimated passenger usage based on sales of tickets in stated financial year(s) which end or originate at Swanscombe. Methodology may vary year on year.

7.27 Other facilities and attractions outside of the defined frontages include the All Saints Church located to the north of the railway station, which opened in in 1894.

DARTFORD WEST

7.28 The centre's shops, services and other main facilities are located along the busy Dartford Road (A226). The extent of the frontages are shown on the Policies Map and this has been reproduced below for ease of reference.

Figure 7.3: Dartford West District Centre: Policies Map - Frontages



7.29 The specific streets and addresses identified on the Policies Map are:

33-43 Dartford Road
84-98 Dartford Road

105 – 143 Dartford Road
West Hill County Primary School

7.30 As Table 7.1 shows, there are some 25 outlets, of which 19 (76%) are defined as being in Class A use. Overall Dartford West has a relatively good mix of uses and retail, service and other facilities:

- **Food and convenience offer:** a Tesco Express (115 Dartford Road), which forms part of the Esso garage, and a small independent convenience store (43 Dartford Road).
- **Comparison goods:** limited to White Glass Shop and Living Reef Aquatics.
- **Retail services:** 7 recorded businesses, including 4 hairdressers, a dry cleaners and a sandwich shop.
- Although the centre has **no cafés and restaurants** (Class A3) it does have two popular public houses. The Rising Sun Harvester (105 Dartford Road) provides food in a family-orientated restaurant and The Ship is a locally-owned traditional pub at 92 Dartford Road.
- There is also a relatively large local choice of Class A5 (takeaway) uses including: the Britannia Fish Bar and Grill, Ming Tak Inn and Pizza Time.
- The centre has a dentist, but there is no library, doctor's surgery, vets or other community facilities within the defined frontages. A number of schools are found in the wider area.

7.31 According to the Council's figures there was only one recorded vacant outlet in the centre at May 2019. This is the former Town and Country Estates unit at 143 Dartford Road, on the corner of Havelock Road. This unit has been vacant since at least 2015, when the Council's first carried out the centre audits. As a result the shop frontage is in a poor state of repair, as is the area to the front and side. Notwithstanding this, vacancy levels in the centre have been consistently low since 2015.

- 7.32 The busy Dartford Road is a major bus corridor, resulting in a negative impact on the overall shopping and pedestrian environment, but it does nevertheless generate trips and footfall for the centre. The limited on and off-street parking also means that the local shops and services will struggle to attract passing trade. The frontages and public realm at 137-143 Dartford Road are particularly poor and would benefit from investment in the pavement and street furniture. The long-term vacant unit at 143 Dartford Road also detracts from the overall environment.
- 7.33 There is a marked separation between the shops, services and facilities located to the east of Dartford West and the five outlets at 33-43 Dartford Road (namely the Dartford Convenience Store, Blue Sky Takeaway, the dentist, Frida's Hair Studio and the dry cleaners) and the school on the opposite side of the road. In our judgement the shops, services and facilities defined as comprising Dartford West District Centre function more as distinct neighbourhood parades, including residential dwellings. The Centre would benefit from environmental improvements to improve its appeal and operation, but it has nevertheless maintained its overall viability and includes a mix of facilities providing services for local residents.

DARTFORD EAST

- 7.34 The centre's shops, services and other main facilities are located along the busy East Hill and The Brent (A226). The extent of the frontages are shown on the Policies Map and this has been reproduced below for ease of reference.

Figure 7.4: Dartford East District Centre: Policies Map – Frontages



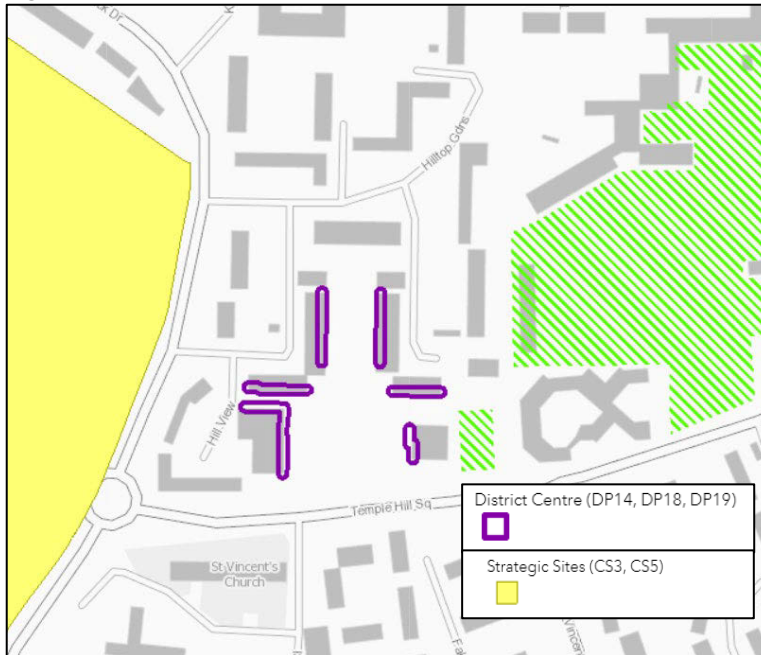
- 7.35 As the figure shows the District Centre comprises East Hill (68A-106 East Hill and 75 East Hill) and The Brent (18-20 The Brent and 1-21 The Brent). East Hill and The Brent are distinct shopping and service areas, separated by residential uses and East Hill Cemetery, but we understand that there is strong pedestrian and vehicular movement between the two areas that means the shops and businesses are well connected.
- 7.36 As Table 7.1 shows, there are some 21 outlets in the District Centre, of which 16 (76%) are defined as being in Class A use. Overall Dartford East has a relatively good mix of uses and retail, service and other facilities:
- **Convenience stores:** Tesco Express anchors East Hill's (no.72-80) food/convenience offer and benefits from some on-street parking. The Nisa convenience store anchors the shops and facilities on The Brent (no.9-13) and includes a post office counter.

- **Comparison outlets:** There were two stores in the centre in May 2019 (as defined by the Council's audit). Both of these are located on The Brent, although we understand that the Antiques and Second Hand Shop (20 The Brent) has since closed and will be replaced by a café.
 - **Retail services:** there are 6 recorded businesses, including 4 hairdressers and Brent Pharmacy (15 The Brent). The representation is split equally between The Brent and East Hill, although East Hill does not have a dedicated pharmacy.
 - **Cafés and restaurants:** Dartford East had no cafés and restaurants (Class A3) at the time of the May 2019 survey. However, as described above, a café will replace the former second hand and antique shop at 20 The Brent.
 - The Woodman (106 East Hill) was the only **public house** in the centre in May 2019, but this has since closed and we understand it is unlikely to reopen.
 - The **three takeaways** include a fish and chips shop (1 The Brent) and pizza takeaway (19 The Brent). The House on the Hill is the only takeaway on East Hill (68B).
 - Within the Dartford East defined frontages there is no doctor's surgery, dentist or library.
- 7.37 Although there is no doctor's surgery, the Livingstone Community Hospital (NHS Primary Care Trust) is located in East Hill opposite Tesco Express. The Pilgrims Way Surgery is located outside the defined frontages on Pilgrims Way and also comprises doctors, paramedics, nurses, health care assistants and other staff.
- 7.38 According to the Council's figures there were no recorded vacant outlets in the centre at May 2019, and there have been no vacancies since the Council's first audit in 2015.
- 7.39 The shops, services and facilities benefit from frontage on to the busy A226 (East Hill and The Brent), which connects Dartford with Bluewater to the east for vehicles and buses. However the single carriageway means there is limited on-street parking to capture passing car-borne trade. Cars tend to park directly outside the shops and facilities on The Brent, which has a negative impact on the environment and streetscape. In contrast there is dedicated on-street parking off East Hill, which benefits both the businesses and the overall environment. In our judgement East Hill provides a much more attractive and safer environment for shoppers and visitors.

TEMPLE HILL SQUARE

- 7.40 Temple Hill Square is located some 0.6 miles to the north east of Dartford Town Centre and within 0.4 miles of Dartford mainline railway station. The A2/M2 lies 1.9 miles to south and the M25 and Dartford River Crossing lies within 3.4 miles to the south east. The centre is also located on the edge of the Northern Gateway Strategic Site.
- 7.41 The centre's shops, services and other main facilities are located around a pedestrianised square with parking provision for circa 70 cars and a further 8 family/disabled places. The Temple Hill community Centre and Library also benefit from dedicated car parking.
- 7.42 The extent of the frontages are shown on the Policies Map and this has been reproduced below for ease of reference.

Figure 7.5: Temple Hill Square District Centre: Policies Map - Frontages



7.43 The defined frontages comprise 1-49 and 2-50 Temple Square, and include Temple Hill Library, Home Start, the Youth Centre and Dartford Gym

7.44 As Table 7.1 shows, the centre has some 19 outlets, of which 14 (74%) are defined as being in Class A use. Overall Temple Hill has a good mix of uses and retail, service and other facilities in a pleasant, well-managed and pedestrianised environment. The key mix of uses include:

- The centre's **food and convenience offer** is anchored by a Co-op supermarket and includes a newsagent, small convenience store and off licence.
- The centre has just **two comparison goods outlets** as defined by the Council (Daysol Pharmacy and Gold Star Mobility).
- There is a good representation of **retail services**, with 5 recorded businesses. These include two hairdressers, a laundrette and dry cleaners.
- There is one **café** (Temple Square Café) and **two takeaways** (Britannia Fish Bar and Haldi Indian Takeaway).
- There are **no public houses** within the defined frontages.

7.45 Within the Dartford East defined frontages there is no doctor's surgery or dentist. The other main facilities include the library and community centre, Home Start, gym and youth centre.

7.46 Temple Hill Community Centre is managed by the Council and is equipped for corporate functions (conferences and training sessions) as well as social events. The Centre has a large hall that holds up to 170 seated guests, with a full size stage and bar area. It also has a separate lounge area that seats an additional 40 guests and is equipped with its own screen.

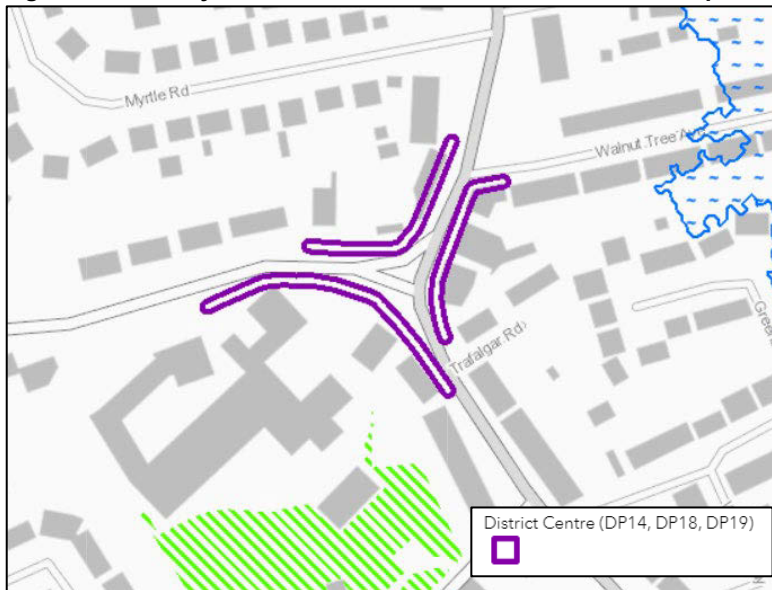
7.47 According to the Council's figures there were no recorded vacant outlets in the centre at May 2019. As far as we are aware there have been no significant vacancies in the centre since the Council's first audit in 2015.

7.48 Other facilities and services in close proximity to the centre include schools (Temple Hill Primary Academy and St Anselm's Catholic Primary School) and churches (St Vincent's RC Church) that help to generate some linked trips to the centre.

HAWLEY ROAD/LOWFIELD STREET

7.49 Hawley Road/Lowfield Street is located less than one mile to the south of Dartford Town Centre along Lowfield Street (A225). The extent of the defined frontages are shown on the Policies Map, which is reproduced below for ease of reference.

Figure 7.6: Hawley Rd/Lowfield St District Centre: Policies Map - Frontages



7.50 The specific streets and addresses identified on the Policies Map are:

1–17 Hawley Road	Scout Hall, Oakfield Lane
291–301 Lowfield Street	6 Hawley Road (Orange Tree PH)
Primary School & Children's Centre, Oakfield Lane	

7.51 As Table 7.1 shows it is the smallest District Centre in the Borough, with 18 outlets recorded by the Council in May 2019. The key mix of uses are as follows:

- The centre's **food and convenience offer** is anchored by a small Co-op supermarket (5-7 Hawley Road). There is also a small Costcutter adjacent to Co-op at 293 Lowfield Street.
- There are no defined **comparison goods outlets** in the centre.
- The four retail services include three hairdressers and a massage therapist (Natural Remedy Centre).
- There is **one café** (Café de Rumpy), **two public houses** (The Cressy Arms and Orange Tree) and **three takeaways** (a fish and chip shop, Chinese and Indian takeaway).

7.52 The other main facilities and attractions within the defined frontages that help to generate trips and footfall include a Beauty Clinic (Le Visage), a dog grooming business (Hair of the Dog), Oakfield Lane County Primary School, Oakland Children's Centre and Scout Group (8th Dartford). There is no library, community centre or gym.

- 7.53 According to the Council's figures there were no recorded vacant outlets in the centre at May 2019. As far as we are aware there have been no recorded vacancies in the centre since the Council's first audit in 2015.
- 7.54 The main shops and facilities are located along the busy Hawley Rd/Lowfield St, which has resulted in a poor pedestrian environment. This is further exacerbated by narrow and poorly maintained pavements and public realm, particularly on the eastern side of the street. There is also limited on-street and off-street car parking, which makes it difficult to attract expenditure from passing car-borne trade. There is, however, a car park to the north of the centre, off Walnut Tree Avenue, which provides circa 25-30 free parking spaces; supporting passing trade opportunities.

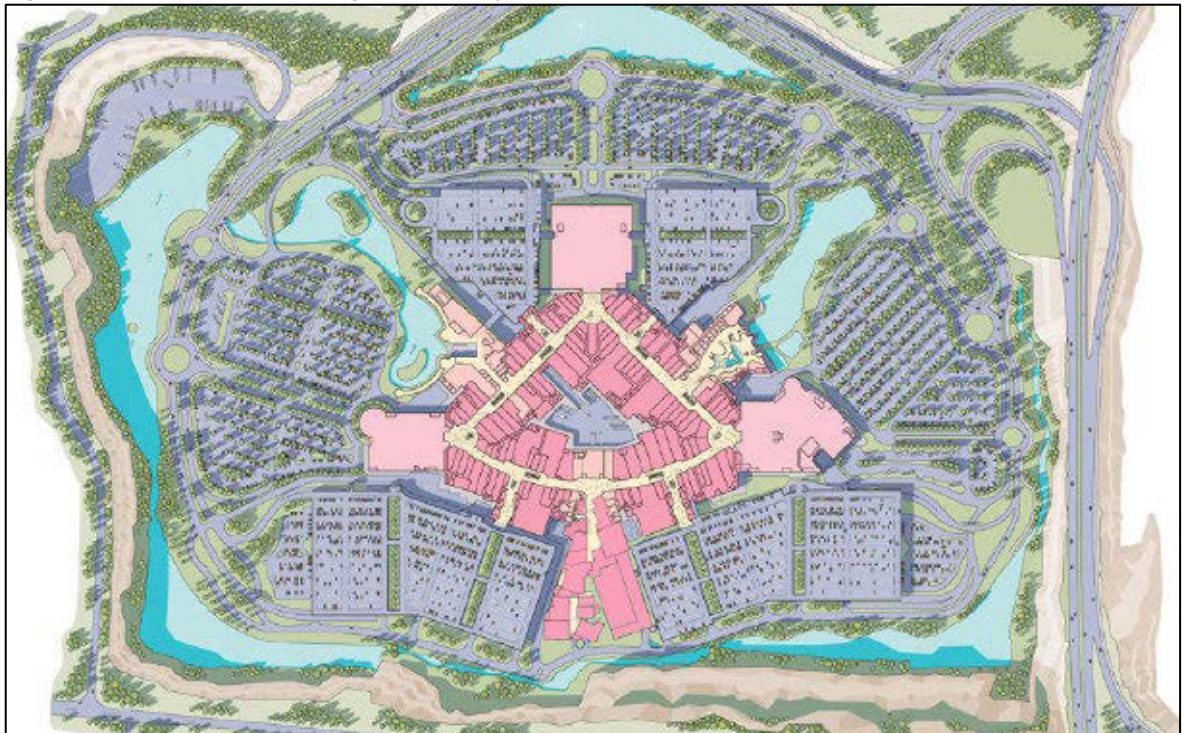
SUMMARY

- 7.55 In summary the Borough's six defined District Centres serve the wider more essential and frequent ("day-to-day") shopping, service, health, leisure and community needs of their mainly local resident catchment populations.
- 7.56 The District Centres provide a range of retail, service and food/beverage uses, alongside wider health, education and community facilities that help to underpin their overall vitality and viability (for example, libraries, doctor's surgeries and/or schools).
- 7.57 The centres vary in terms of the scale, choice and quality of their offer, ranging from Longfield, which is the largest District Centre, to Hawley Road/Lowfield Street, which is the smallest.
- 7.58 At the time of our review and audit all the centres appeared to be healthy and viable; for example they all had one or less vacant units.
- 7.59 Overall we conclude that the District Centres are all performing important roles and functions in the Borough's hierarchy, mainly meeting the day-to-day needs of their local communities.
- 7.60 Notwithstanding this, some of the centres would benefit from investment in their built and street environments (for example, Longfield, High Street Swanscombe and Hawley Road/Lowfield Street).
- 7.61 Others would benefit from improved or better managed on-street and/or off-street parking (for example, Dartford West and Dartford East).
- 7.62 Suitable residential use above and potentially behind ground floor shops is also supported, along with mixed use redevelopment where it contributes to the provision of sustainable local shops and overall objectives for District Centres, in line with policy

8. BLUEWATER SHOPPING CENTRE

- 8.1 Bluewater opened in March 1999 in a 97 hectare former chalk quarry in Greenhithe. It is located approximately 22 miles to the east of London, five miles to the east of Dartford town centre, five miles to the west of Gravesend town centre and approximately one mile east of the M25. It is bounded to its south by the A296, the B255 to its east and the A226 to the north. Beyond Bluewater's perimeter road (Bluewater Parkway) there are residential areas to the north and east, with open space and Darenth Wood to the south, beyond the A296. Eastern Quarry is located to the east and forms part of Ebbsfleet Garden City (see Section 3).
- 8.2 Bluewater is jointly owned by Aberdeen Standard Investment, GIC Real Estate, Land Securities, Lend Lease Retail Partnership, M&G Real Estate and Royal London Asset Management. It is one of the UK's largest shopping and leisure destinations, with over 320 shops, cafés and restaurants arranged over two levels in a triangular circuit, with a department store (John Lewis, Marks & Spencer and House of Fraser) anchoring each corner of the 'triangle'. Each is connected by three distinct shopping malls: The Guildhall, The Rose Gallery and The Thames Walk. These malls have distinct themes and their retail offer is predominantly dominated by multiple retailers. Thames Walk broadly provides mainly high-end fashion retail; the Rose Gallery is more family-focused, with some major high street retailers; and Guildhall is characterised by high street fashion, cafés and entertainment uses.

Figure 8.1: Bluewater Shopping Centre - Layout



- 8.3 In addition to the retail facilities, Bluewater has three 'leisure villages' - East Village, West Village and South Village - that together provide alternative complementary attractions to the shops, including the 17-screen cinema.
- 8.4 The centre is served by some 13,000 managed car parking spaces and employs over 7,500 people (full and part-time). A large proportion of those working in the centre live in Dartford and Gravesham Boroughs. In addition Bluewater's 'Learning Shop' provides on-site employment and training, in partnership with Land Securities, North West College and Job Centre Plus. Many of Bluewater's

retailers use the Learning Shop exclusively for staff recruitment and training, and it has become a blueprint for similar schemes across the UK

PLANNING HISTORY

- 8.5 Outline planning permission for Bluewater was granted by the Secretary of State on 11 May 1990 (ref: DA/88/0336). The outline consent placed restrictions on the scale of retail and leisure floorspace and on the types of goods to be sold. The gross lettable retail floorspace permitted by the original outline consent was restricted to 118,450 sqm, with a minimum of 11,613 sqm devoted to recreation and leisure uses. The consent also restricted the level of floorspace to be used for the sale of food and convenience goods to 11,148 sqm gross. These restrictions sought to control the impact of the development and to ensure that an appropriate mix and balance of uses was provided.
- 8.6 Since the centre opened in March 1999 it has been subject to a number of planning applications and permissions, mainly relating to minor consents for changes of use and extensions to the retail and catering. The most relevant of recent consents are highlighted in the table below.:

Table 8.1: Bluewater – Significant Planning Permissions, 2013-2019

Date Permission Granted:	Planning Application Reference:	Summary:
August 2013	DA/12/01464/OUT	Permission for the outline application for redevelopment of the West Village to provide additional retail floorspace of up to 30,500 m ² (a 22% increase to the existing centre).
May 2016	16/0037/COU	Permission to change the use of the Glow Events space (the events venue at the South Village) to a cinema and other family-orientated leisure uses. These have all been built out. Glow is no longer operating and the area was converted to additional leisure space.
January 2016	15/01503/FUL	Permission for a two-storey rear extension to H&M (MSU5) by 1,374 sqm (GEA) to provide a larger store.
June 2017	16/01207/OUT	Permission granted to outline application to extend and alter the West Village area to provide retail and related uses (A1-A5); reconfiguration of existing car/coach parking areas; reconfiguration of existing lake, open space and public realm; alteration of existing pedestrian links within the site; infrastructure and associated works. The permission allows for up to 30,000 sqm Gross External Area (GEA) of new Class A1-A5 floorspace (under condition 30). This represents a 20% increase on Bluewater's existing floorspace and superseded the 2013 consent (DA/12/01464/OUT). Notwithstanding the reconfiguration of the existing car parking, the total number of spaces are retained at approximately 13,000.
August 2019	DA/18/01377/FUL	Permission for site clearance, building operations and other operational works to the existing cliffs to enable the erection of an adventure centre comprising a reception building, aerial trekking course, 360 vertigo swings, skydiving machine, zip wire, zip wire start tower and landing platform, 'giant swing', adventure platform and external rock climbing wall, with associated hard and soft landscaping. Condition 14 of the permissions restricts the maximum numbers of users of the Adventure Park activities to 50,000 in any calendar year, unless otherwise agreed in writing with the Local Planning Authority. The applicant is required to maintain records to monitor the number of users and these shall be provided to the Local Planning Authority within 28 days of the receipt of a written request for the details.

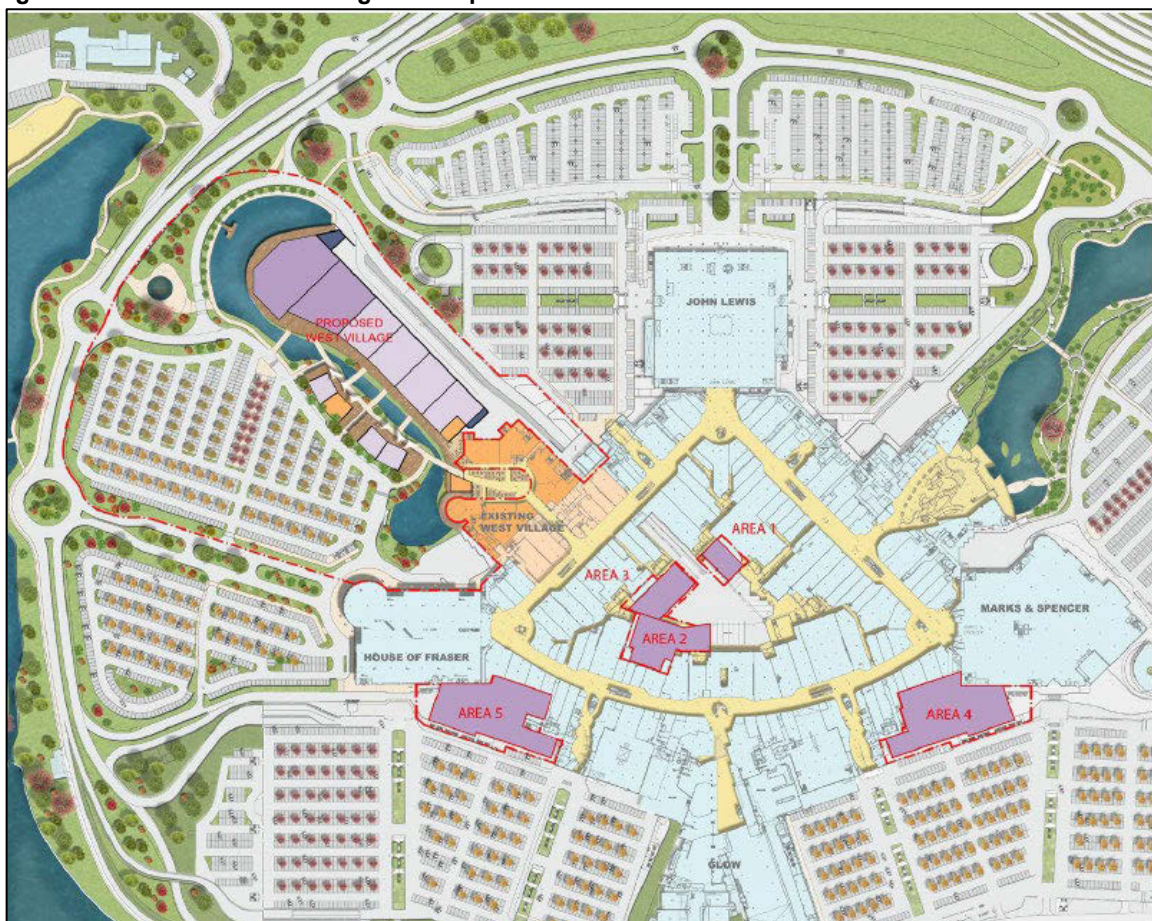
Source: Various planning applications and supporting documents.

- 8.7 The application to extend and alter the West Village (reference: 16/01207/OUT) was submitted in outline to provide the necessary flexibility for the detailed design of the scheme at a later date⁴⁸. To help mitigate any potential significant adverse impacts on centres the June 2017 permission was conditioned to provide for: a minimum of 51% and a maximum of 28,500 sqm for Class A1 comparison goods retail (condition 32); and a maximum of 2,500 sqm for Class A3-A5 uses (condition 33). Under condition 31 Class A1 convenience goods retail is restricted to 1% of the net additional floorspace permitted. In other words the permission does not allow for the bulk of the floorspace to be taken up by a large food superstore.

⁴⁸ The Parameter Plans, Development Framework and Design and Access Statement provided the framework within which future reserved matters applications will be submitted.

- 8.8 The owners stated that the new retail floorspace was needed to improve and complement the range of existing shopping and catering facilities at Bluewater and to extend some of the existing units to create space for Major Space Users (MSUs). In turn, this would enable the centre to maintain and support its position in the retail hierarchy and to “positively evolve” as a specialist regional comparison shopping centre. Forecasts indicated that the extension would create up to 2,600 job opportunities, many of which would be available to local people.
- 8.9 The Council has confirmed that some 4,267 sqm gross of Class A1 retail floorspace has been built out to date (ref. 17/01202/REM). This leaves a residual 24,233 sqm gross of Class A1 retail with permission that had not been implemented at the time of preparing this assessment (out of the total maximum Class A1 floorspace allowed under Condition 32 of 28,500 sqm gross). It should be noted that the remaining permitted retail floorspace has necessarily been treated as a commitment as part of the retail capacity assessment set out in Section 10. Notwithstanding this, the floorspace may not be developed out as planned due to the impact of economic and market trends on retailer demand for space, which has been further exacerbated by the impact of COVID-19. The plan below provides an illustration of the outline proposal, as set out in the *Design and Access Statement (DAS)* submitted in support of the application.

Figure 8.2: Bluewater West Village Masterplan



- 8.10 The August 2019 permission allows for a new outdoor adventure centre (reference: DA/18/01377/FUL) on a 5.1ha site covering the lakes and cliffs located along the shopping centre’s western boundary, To be known as ‘*Bluewater Hangloose*’ the adventure centre comprises of a reception building (522sqm) and a range of outdoor adrenalin activities, including:

- ‘Skywire’ – a 680m zip line will traverse most of the site, starting from a tower located in the north to the cliff face in the south;
 - ‘Gravity’ – a giant swing capable of reaching a height of approximately 53 metres;
 - ‘Adventure Platform’ - a series of timber platforms cantilevered off the southern cliff face, with an airbag located at ground level below. The platforms will form the base for four activities known as ‘Gorilla Slide’, ‘Free Fall’, ‘Big Air’ and ‘Base Jump’.
 - ‘Climbing wall’ – a climbing wall constructed into the cliff-face;
 - ‘Skytrek’ – an aerial trekking course;
 - ‘Skydiver’ – a Skydiving machine;
 - ‘360 Vertigo Swings’- a series of unique swings; and
 - ‘VR Extreme’ – an indoor virtual reality experience.
- 8.11 Visitors to Bluewater Hangloose will utilise the existing car parks at Bluewater and access the adventure centre via a designated footpath and underpass beneath Bluewater Parkway. Access to the Skywire tower will only be available via mini-bus along the Cliff Reach internal service road.
- 8.12 The centre has also diversified its offer through the provision of permanent and temporary leisure uses. These have included consents for the temporary erection of an Ice Rink and Christmas Grotto since 2008; and an urban beach, fairground rides, attractions, food and drink stalls and associated facilities during the Summer periods since 2017⁴⁹. The August 2016 permission also allowed the change of use of the former Glow Events venue (Use Class D1), to a cinema and other family-orientated leisure uses (Use Class D2), restaurant facilities (Use Class A3). Various non-material amendments have subsequently been approved to the Glow planning permission.

POLICY CONTEXT

- 8.13 As described in Section 2, the 2011 Core Strategy differentiates between the roles of Bluewater and Dartford Town centre. Bluewater is identified as providing “*specialist comparison shopping*” services, supplemented by top-up convenience shopping and leisure uses, whereas Dartford’s role is focussed more on “*weekly convenience and comparison shopping*”.
- 8.14 Applications for new development and floorspace at Bluewater are subject to **Policy CS12** (5&6) of the Core Strategy. The boundary of the centre is defined on the Policies Map and has been drawn to focus on the retail and directly related (parking, servicing and immediate access) lands at Bluewater.
- 8.15 Whilst the Core Strategy recognised that any growth at Bluewater had the potential to impact on neighbouring town centres, it also identified that if Bluewater is prevented from developing and improving its offer to remain competitive, this was: “*...likely to result in the centre losing out to its regional level competitors with the consequence that local residents travel further to access regional level facilities and/or Bluewater competes more directly with the quality of offer in neighbouring town centres, reducing their local market share*” (paragraph 3.31).

⁴⁹ The most recent applications for a temporary Christmas Grotto and Ice Rink on the area adjacent to the Red Car Park, The Village, and for an urban beach, etc., on land at Western Car Par were submitted in May 2020 (references: 20/00523/FUL & 20/00549/FUL) and approved by the Council in July 2020.

8.16 The DDPP (paragraph 12.14) considered that the principle of retail impact assessment and cooperating with other authorities, as set out in the Core Strategy, was appropriate to ensuring a regional shopping function is maintained that is distinct from town centres in the wider area.

TOTAL FLOORSPACE

8.17 According to Experian GOAD⁵⁰ Bluewater currently has a total gross floorspace of 153,327 sqm (1,650,400 sqft). It has experienced a 5.6% increase in its total floorspace from 145,226 sqm gross in 2009 due to recent new development in the centre. There are some 323 retail and service outlets in the shopping centre, which is equivalent to an average unit size of 475 sqm (5,110 sqft).

8.18 The table below shows that Bluewater is the 4th largest RSC in the UK, after the two Westfield Centres in Stratford and Shepherds Bush, and Metro Centre.

Table 8.2: Regional Shopping Centres – Total Gross Floorspace

			Year Opened		Total Floorspace	
				Gross sqft	Gross sqm	
Westfield - Shepherds Bush	London	2008		2,410,000		223,896
Metro Centre	Newcastle	1986		2,080,000		193,238
Westfield - Stratford City	London	2008		1,830,000		170,012
Bluewater*	Dartford	1999		1,650,400		153,327
Trafford Centre	Manchester	1998		1,600,000		148,645
Merry Hill	Birmingham	1986		1,540,000		143,071
Lakeside	Thurrock	1990		1,410,000		130,993
Meadowhall	Sheffield	1990		1,340,000		124,490
Brent Cross	London	1976		840,000		78,038
Cribbs Causeway	Bristol	1998		790,000		73,393
AVERAGE:				1,549,040		143,910

Sources: All floorspace figures are sourced from PMA PROMIS Reports, apart from *Bluewater's gross floorspace which has been sourced from Experian Goad.

DIVERSITY OF OFFER: RETAIL AND SERVICE PROVISION

8.19 As the table below shows, Bluewater's retail offer is dominated by **comparison goods** retailing. Its 191 outlets represent some 59% of the centre's total outlets, which is significantly above the Experian GOAD national average of 29.2%. The total comparison goods floorspace of 114,605 sqm represents some three-quarters (75%) of total floorspace, which is also above the national average figure of 33.6%.

8.20 The planning condition that restricts the development of **convenience goods** retail floorspace is reflected by the fact that Bluewater's 16 outlets (1,254 sqm) represent approximately 5% of all units and 0.8% of total floorspace. This compares with the national averages of 9.2% and 15.4% respectively. It should be noted however that the Experian GOAD audits do not account for the food hall in M&S and the Waitrose (circa 1,858 sqm) in John Lewis. Aside from M&S and Waitrose the centre's offer is mainly characterised by small scale food and convenience.

⁵⁰ Experian Goad Category Reports (June 2009 and November 2015).

Table 8.3: Bluewater: Retail and Service Composition by Outlets and Floorspace, 2009-19

	2009			2015			2019		
	Number	% of Total Outlets	UK Average	Number	% of Total Outlets	UK Average	Number	% of Total Outlets	UK Average
Convenience	15	4.2%	8.8%	12	3.5%	8.6%	16	5.0%	9.2%
Comparison	237	66.2%	34.3%	229	67.4%	32.0%	191	59.1%	29.3%
Service	75	20.9%	45.8%	84	24.7%	48.2%	88	27.2%	49.5%
Other						0.1%			0.1%
Vacant	31	8.7%	10.9%	15	4.4%	11.2%	28	8.7%	11.9%
TOTAL	358	100%	100%	340	100%	100%	323	100%	100.0%

	2009			2015			2019		
	Goad Floorspace (sqm)	% of Total Space	UK Average	Goad Floorspace (sqm)	% of Total Space	UK Average	Goad Floorspace (sqm)	% of Total Space	UK Average
Convenience	799	0.6%	14.0%	715	0.5%	15.2%	1,254	0.8%	15.4%
Comparison	115,943	79.8%	38.0%	118,925	77.5%	35.9%	114,605	74.7%	33.6%
Service	21,135	14.6%	39.0%	32,117	20.9%	39.9%	32,470	21.2%	39.9%
Other						0.1%			0.1%
Vacant	7,349	5.1%	9.0%	1,682	1.1%	9.0%	4,998	3.3%	10.5%
TOTAL	145,226	100%	100%	153,439	100%	100%	153,327	100%	100%

Source: Experian Goad Category Reports. Figures may not sum due to rounding

Notes: The floorspace figures are derived from Experian Goad Plans and these only show the footprint floorspace and the site area without the building lines. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres.

8.21 Bluewater has an estimated 88 **retail, leisure and financial service** outlets trading from a total floorspace of 32,470 sqm. Its overall provision is also significantly below the Experian GOAD national averages.

RETAILER REPRESENTATION

8.22 Bluewater has a high quality choice of national multiple retailers, services and leisure operators trading from modern format stores. The Experian GOAD figures indicate that there are some 230 multiple retailers in the centre (equivalent to almost 71% of total outlets), trading from a total floorspace of 130,204 sqm (equivalent to 85% of total floorspace).

8.23 The table below shows the representation of multiple retailers (food and non-food) and café/restaurants in the selected RSCs based on the latest PMA PROMIS Reports. Bluewater is ranked above the other RSCs in terms of its total number of non-food and café/restaurant multiples.

Table 8.4: Regional Shopping Centres - Multiple Representation

		Number of Non-Food Multiples	Number of Food Multiples	Number of Food & Beverage Multiples	TOTAL
Bluewater	Dartford	188	1	48	237
Westfield - Shepherds Bush	London	166	2	36	204
Westfield - Stratford City	London	166	2	36	204
Meadowhall	Sheffield	161	0	36	197
Trafford Centre	Manchester	127	0	35	162
Lakeside	Thurrock	125	2	38	165
Metro Centre	Newcastle	119	1	41	161
Merry Hill	Birmingham	98	1	22	121
Cribbs Causeway	Bristol	95	1	27	123
Brent Cross	London	78	1	18	97
AVERAGE:		132	1	34	167

Source: PMA Promis Reports (2020)

8.24 The major multiples are mainly concentrated in larger format units in the Guildhall, Thames Walk and Upper Rose Gallery malls. Some of the key multiple retailers and cafés/restaurants represented at the time of finalising this study included:

- **Department / Variety Stores:** include John Lewis, Marks & Spencer and Primark.
- **Fashion Multiples:** All Saints, H&M, Dune, Next, New Look, JD Sports, Zara, Gap, Urban Outfitters, Hollister, Kurt Geiger, Hugo Boss, LK Bennett, Monsoon, Russell and Bromley, Ted Baker, White Stuff and River Island.
- **Non-Fashion Multiples:** Apple, Boots, Dyson, Ernest Jones, Hotel Chocolat, Molton Brown, Waterstones, WH Smith.
- **Foodstores:** Little Waitrose and Marks and Spencer food hall
- **Cafés / Restaurants:** Ask, Bills, Costa, Cote, Five Guys, KFC, McDonald’s, Nando’s, Pizza Express, Pret a Manger, Starbucks and Wagamama.

8.25 The table below compares Bluewater’s main anchor department and variety stores with other comparable regional shopping centres. It shows that Trafford Centre, Manchester, has the most anchor stores (six) and Bluewater’s provision is broadly comparable to other centres.

Table 8.5: Regional Shopping Centres – Anchor Department and Variety Stores

		Department / Variety Stores						
		John Lewis	Selfridges	Fenwick	Debenhams	House of Fraser	Marks & Spencer	Primark
Bluewater	Dartford							
Westfield - Shepherds Bush	London							
Westfield - Stratford City	London							
Meadowhall	Sheffield							
Trafford Centre	Manchester							
Lakeside	Thurrock							
Metro Centre	Newcastle							
Merry Hill	Birmingham							
Cribbs Causeway	Bristol							
Brent Cross	London							

Source: PMA PROMIS Reports (2020).

DIVERSITY OF OFFER: COMMERCIAL LEISURE PROVISION

8.26 Bluewater’s commercial leisure offer is provided in three distinct areas:

- **Wintergarden (East Village):** is accessed from the Rose Gallery at the lower floor and is geared towards children and families including McDonalds, KFC, Pizza Hut and Nandos among others.
- **Town Square (West Village):** is accessed from the Guildhall at the lower floor, and is geared towards ‘lifestyle’ and higher order leisure operators.
- **Water Circus (South Village):** the 17-screen Showcase Cinema du Lux cinema anchors the South Village and is complemented by a choice of cafés and restaurants. The 2016 permission allowed the extension of the cinema into the former Glow exhibition space. The South Village also has an indoor climbing wall and accommodates a temporary ‘Winter Wonderland’ over the Christmas period, with a Ferris Wheel, Ice Rink and German Market.

8.27 In addition, and as described above, Bluewater also has permission for a new outdoor adventure centre - ‘Bluewater Hangloose’ – comprising a range of outdoor adrenalin activities, including a 680m zip line, a climbing wall and Skydiving machine. It also hosts several temporary leisure uses and attractions during the Summer and Christmas periods, including an urban beach.

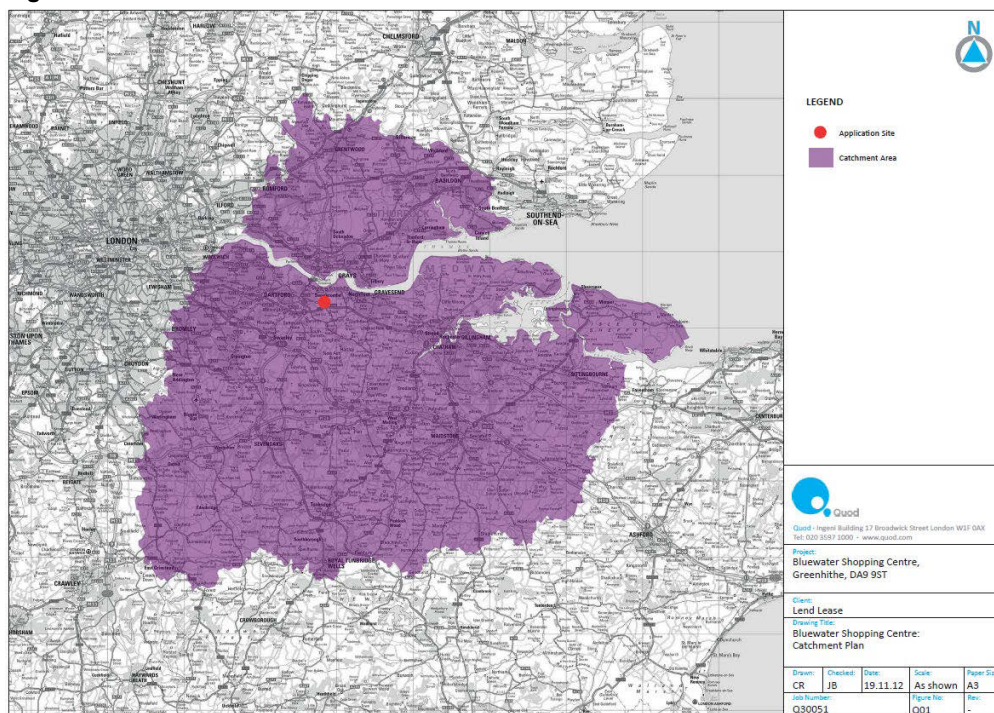
8.28 A more detailed breakdown of Bluewater’s food and beverage offer based on Experian GOAD data shows that it has some:

- 25 restaurants, which represent 7.7% of total outlets in the centre (above the national average figure of 4.8%);
- 15 fast food and takeaway outlets, which is equivalent to 4.6% of total outlets (below the national average of 5.8%); and
- 14 cafés, which equivalent to 4.3% of total outlets (slightly below the national average of 4.8%).

CATCHMENT & TRADING CHARACTERISTICS

8.29 Bluewater draws its shoppers and trade from a wide catchment area. The plan below shows the broad extent of this catchment area based on in-centre surveys undertaken by CACI. This informed the Retail Impact Assessment (RIA) submitted in support of planning application 16/01207/OUT.

Figure 8.3: Bluewater Catchment Area



Source: West Village Bluewater – Evolution: Retail Impact Assessment (October 2016), Appendix 1.

8.30 According to the retail assessment submitted in support of the planning application, Bluewater was estimated to be achieving a comparison goods turnover of circa £850m in 2016⁵¹.

VACANCY LEVELS

8.31 The number of vacancies recorded in the centre fell from 31 units in July 2010, to 15 in November 2015. They have since increased to 28 according to the latest Experian GOAD audit, although this may reflect the impact of new development and closures in the centre resulting in short term vacancies. Notwithstanding the rise in vacancies since 2015, the estimated vacancy level of 8.7% in 2019 was below the UK average at the time of 11.9% (see Table 8.3)⁵². Total vacant floorspace (4.998 sqm) represented some 3.3% of total floorspace and was also significantly below the national average figure of 10.5%.

⁵¹ West Village Bluewater – Evolution: Retail Impact Assessment (October 2016), paragraph 6.19.

⁵² This figure was recorded before the impact of the COVID-19 pandemic.

MARKET DEMAND

- 8.32 The 2010 DRCLS identified that there were some 48 recorded requirements in December 2009, equivalent to demand for between 14,795 sqm and 36,887 sqm. Those operators at the time with reported interest in taking space in the centre included Esprit, Bose, Ann Summers, Uniqlo, Rituals, Desire by Debenhams, Zara Home, Letterbox, Viet Grill, Café Rouge, Strada, Subway and Gourmet Burger Kitchen (GBK). Ann Summers, Uniqlo, Rituals, Café Rouge and GBK have all since taken space in the centre. Recent openings include Primark, Ribble Cycles, Ori Café, Levi's Women and Polo Ralph Lauren.
- 8.33 As described above, the rationale behind the 2016 outline application (16/01207/OUT) - which was granted permission in June 2017 - was that Bluewater needed to provide larger format shop units to meet the demand from modern retailers. The most recent published requirements list is summarised in the table below.

Table 8.6: Published requirements for Bluewater

Operator	Use Class	Size (sq ft)		Size (sq m)	
		(min)	(max)	(min)	(max)
1 Deichmann	A1	4,000	6,000	372	557
2 Subway	A1	200	1,200	19	111
3 Patisserie Valerie	A1	1,000	2,000	93	186
4 Hawkins Bazaar	A1	1,600	3,000	149	279
5 The Works	A1	1,750	2,500	163	232
6 Guess	A1	3,000	5,000	279	465
7 Warren James	A1	700	700	65	65
8 Simit Sarayi	A1	500	3,000	46	279
9 Calendar Club	A1	800	2,000	74	186
10 Holland & Barrett	A1	900	7,000	84	650
11 Dr Martens	A1	1,000	2,000	93	186
12 Hope & Glory	A1	600	1,000	56	93
13 Little Dessert Shop	A1/A3	1,500	2,500	139	232
14 German Doner Kebab	A3	250	2,500	23	232
15 Lokkum Bar & Grill	A3	2,500	2,500	232	232
16 Paramount Lebanese Kitchen	A3	1,500	3,000	139	279
17 The White Brasserie	A4	2,500	4,000	232	372
TOTAL:		24,300	49,900	2,258	4,636

Source: Retailer Requirement List as at March 2019.

- 8.34 The table shows that there are some 17 recorded requirements from A1-A4 operators. In total these operators have a minimum floorspace requirement of 2,258 sqm and a maximum requirement of 4,636 sqm. However these published requirements should be treated with caution, and could be higher for Bluewater, as most high profile retailers and operators with an interest in taking space in the centre would not normally choose to advertise their requirements as it could impact on their negotiating position with the owners.

COMMERCIAL RENTS & YIELDS

- 8.35 The latest PMA PROMIS report indicates that Bluewater achieved an estimated Prime Zone A retail rent in mid-2020 of approximately £3,552 per sqm (£330 per sqft). This represents a 15.4% fall in rental levels from the £4,198 per sqm (£390 per sqft) achieved in 2017 and a 20% fall from the highest reported rents in 2008 of £4,467 per sqm.
- 8.36 This fall in rental levels need to be considered in the context of the wider trends impacting on the retail sector as a whole and shopping centres specifically. As reported in Section 4 prime retail rents achieved across many UK towns and cities have fallen significantly in recent years. Initially this

reflected the wider malaise impacting the UK retail sector because of both the diversion of retail sales to online, and the combined impact of rising costs and the pressure to discount on retailer profitability. Most recently the impact of COVID-19 pandemic has accelerated these structural changes.

- 8.37 At the end of 2019, for example, PMA estimated that prime retail rents across the top 200 UK towns and cities were, on average, 13.5% below levels reported at end-2017. Despite the dearth of open market evidence PMA estimate that in the six-month period to mid-2020 Prime Zone A rents fell further by an average of 10%. The retail market and rents will be further impacted by rent renegotiations as occupiers seek to reduce their occupational costs. In this context the reported fall in Bluewater's Prime Zone A rent of -15% since 2017 is below the PMA reported average rate of decline of -22.1%.
- 8.38 Comparisons with other RSCs across the UK show that Bluewater is ranked 6th out of ten in terms of its current Prime Zone A rents. The -15.4% fall in its prime rents between 2017-2020 is below the average of -17.6% for all ten RSCs. Those centres that have experienced the most marked fall in rental levels include Lakeside (-30%), Cribbs Causeway (-25%) and Brent Cross (-19.1%).

Table 8.7: Regional Shopping Centres – Change in Prime Zone A Rental Levels

		Estimated Prime Zone A Rents (£ per sqm)			Change (%)	
		2020	2017	2013	2017-20	2013-20
Westfield - Shepherds Bush	London	£4,844	£5,490	£4,306	-11.8%	12.5%
Trafford Centre	Manchester	£4,144	£4,844	£4,306	-14.4%	-3.8%
Westfield - Stratford City	London	£4,123	£4,951	£3,229	-16.7%	27.7%
Brent Cross	London	£3,875	£4,790	£4,790	-19.1%	-19.1%
Meadowhall	Sheffield	£3,714	£4,413	£4,036	-15.9%	-8.0%
Bluewater	Dartford	£3,552	£4,198	£3,875	-15.4%	-8.3%
Lakeside	Thurrock	£2,637	£3,767	£3,767	-30.0%	-30.0%
Metro Centre	Newcastle	£2,583	£2,960	£3,498	-12.7%	-26.2%
Cribbs Causeway	Bristol	£2,422	£3,229	£3,229	-25.0%	-25.0%
Merry Hill	Birmingham	£1,830	£2,153	£2,045	-15.0%	-10.5%
AVERAGE:		£3,372	£4,080	£3,708	-17.6%	-9.1%

Source: PMA PROMIS Reports (2020)

- 8.39 There is no current information on retail yields for Bluewater.

FOOTFALL

- 8.40 It was recently reported by the owners that Bluewater generates a total annual footfall of approximately 26 million. The areas with the highest pedestrian flows were on the Upper and Lower levels of the Guildhall, Thames Walk and Upper Rose Gallery malls. In general terms the movement between the shopping malls is well signposted and easily navigable.

ACCESSIBILITY & PARKING

- 8.41 Bluewater benefits from good accessibility by car and bus.
- 8.42 The centre is easily accessible by public transport. Good rail connections to Bluewater are available from Greenhithe and Ebbsfleet stations. Greenhithe provides connections to local destinations in Kent and onwards to London and Charing Cross. Ebbsfleet is served by high speed services between London St Pancras and destinations further afield in Kent. Both stations are accessible from Fastrack bus services, which provide high quality, local access between Bluewater, Dartford, Ebbsfleet and Gravesend. The journey to Bluewater takes approximately 15 minutes from Ebbsfleet International, 20 minutes from Dartford and 25 minutes to Gravesend.

- 8.43 Greenhithe Station is the closest station to Bluewater and shuttle bus services are available from this station. Transport for London also operates a range of buses in and around Dartford. Bluewater has strong accessibility by road due to its close proximity to the A2, A296 and A206.
- 8.44 However pedestrian and cycle access to Bluewater is poor. There are very limited walking/cycling routes down into the quarry. Furthermore, the environment immediately surrounding the shopping centre is vehicle dominated with a girdle of roads and car parking around the shopping centre, making access into the shopping centre on foot/bike very difficult.
- 8.45 The direct Fastrack route being provided as part of development in Ebbsfleet Garden City will run across Eastern Quarry between Ebbsfleet Station and Bluewater. A tunnel through the chalk spine separating Bluewater from the new residential communities in Ebbsfleet Garden City is due to be implemented by 2022. This should also provide a pedestrian/cycle route that will make a positive addition to sustainable transport options.
- 8.46 The centre is served by approximately 13,000 car parking spaces. These are distributed around the retail areas in seven individual car parking zones (four of which are decked). Access to the car parks is provided via a ring road, Bluewater Parkway, around the perimeter of the site.

ENVIRONMENT

- 8.47 Bluewater is a managed covered shopping centre and benefits from a clean, well maintained and high-quality environment and public realm. There is a good provision of places to sit and planted areas within the malls add to the overall quality of the environment. Wayfinding/signage around the centre is generally clear and these are supplemented by information points. Outside of the covered malls the centre also benefits from the attraction of lakes and play area set in natural landscaped grounds.

PERCEPTIONS OF SAFETY AND OCCURRENCE OF CRIME

- 8.48 The centre is well managed and is a safe environment with good CCTV and security surveillance.

SUMMARY

- 8.49 In summary Bluewater is classified as a *Specialist Regional Shopping Centre* by the Dartford Core Strategy. Its main Strengths, Weaknesses, Opportunities and Threats include the following:

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ○ A catchment area that extends across a wide area, well beyond the Borough area. ○ Strong, high quality comparison goods offer, significantly above the national UK average. ○ Good leisure provision, including a 17-screen cinema, trampoline park and other attractions. ○ Vacancy levels below the UK average. ○ Strong representation of national retailers and anchor stores. ○ Good accessibility by road and rail, and good car parking provision. ○ Strong pedestrian flows. ○ High quality, well maintained shopping environment. ○ Although Prime Zone A rents have fallen in the centre, in line with national trends, it significantly outperform other centres in the area and across the UK. 	<ul style="list-style-type: none"> ○ High modal share by car ○ Significant traffic congestion on access roads; particularly at Christmas and other peak periods. ○ Lack of hotels

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ○ Lakes and parkland setting ○ Investment in Fastrack ○ Part implemented consent, circa 25,000 sqm remaining of new retail floorspace. ○ Potential for new hotels and conferencing / flexible venue space. ○ Outdoor leisure attractions and facilities. 	<ul style="list-style-type: none"> ○ Structural changes to retail and leisure sectors due to impact of online shopping and leisure alternatives (e.g. deliveroo, uber eats, etc.). ○ Fall in market demand and business failures impacting on retail and food and beverage operators. ○ Competition from Westfield Stratford and Lakeside. ○ Potential threat from new Leisure Resort.

9. CATCHMENT, COMPETITION & MARKET SHARES

9.1 This section first describes the extent of the study area and zones defined as the framework for the household telephone interview survey. It then sets out the headline results of the survey-derived market share analysis for convenience and comparison goods shopping. The more detailed tabulations are provided in Appendix B.

STUDY (CATCHMENT) AREA DEFINITION

9.2 The definition of a robust Study (Catchment) Area is an important starting point for retail and town centre assessments (see Appendix A1). The study area and zones provide the sampling framework for the household telephone interview survey. The zone-by-zone approach enables more detailed analysis of shopping patterns, market shares and expenditure flows for the purpose of the retail capacity assessment, in accordance with good practice.

9.3 In this case the Study Area and Zones have been defined based on Electoral Ward boundaries. This Ward-based approach differs from previous studies for the Council where the Study Area was defined using postcode sector boundaries. In our judgement the Ward-based approach is preferred in this case as it facilitates easier like-for-like comparison with the Council's other evidence-based studies and the (ward-based) population projections.

9.4 As the plan in Appendix A1 shows the Study Area has been sub-divided into 11 zones (based on Ward geography). This covers the Borough Area and broadly approximates to the primary catchment areas from which Dartford Town Centre and the Borough's main District and Neighbourhood Centres draw the majority of their shoppers and trade. The exception to this is Bluewater Shopping Centre which has a much wider catchment and trade draw (see Section 5).

9.5 To help inform our analysis and summary of the headline market shares we have grouped the 11 zones into the following broad geographic areas.

- **DARTFORD WEST (Zones 1-5):** broadly covers the west of the Borough area and represent Dartford Town Centre's primary catchment (i.e. the area from which it should draw the majority of its shoppers and trade). The other main District Centres in this area are Temple Hill Square, Dartford West, Dartford East and Hawley Road / Lowfield Street.
- **DARTFORD EAST (Zones 6-8):** covers the east of the Borough. Bluewater is the main centre in this area, along with Swanscombe High Street and Longfield District Centres. Ebbsfleet is also located in Zone 7.
- **OUTSIDE BOROUGH (Zones 9-11):** Zone 9 to the west covers part of the London Borough of Bexley and includes the main centres of Erith and Bexleyheath. Zone 10 to the south covers part of Sevenoaks District Council and the main centres include Swanley and Farningham. Zone 11 covers Gravesend Borough in part and the western side of Gravesend's residential urban area and town centre.

CATCHMENT POPULATION AND EXPENDITURE

9.6 The 2019 population and expenditure estimates are set out in Appendix A2 and summarised in the table below. The population figures have been sourced from DBC based on government housing requirements (see Section 10) and the average retail (comparison and convenience) expenditure per person by zone has been sourced using LSH's in-house Experian *Micromarketer Generation 3* (MMG3) Geographic Information System (GIS). All comparison and convenience goods expenditure

figures are expressed in 2017 prices. No allowance is made at this stage for the market share of 'Special Forms of Trading'⁵³ (SFT), including online expenditure.

Table 9.1: 2019 Catchment Population and Available Retail Expenditure (£ millions)

ZONES	2019 Population	Available Retail Expenditure (£ million): including Special Forms of Trading		
		Comparison Goods	Convenience Goods	TOTAL
1	2,645	£10.58	£6.39	£16.97
2	17,941	£67.67	£38.44	£106.11
3	23,529	£98.94	£54.30	£153.23
4	16,736	£82.10	£41.65	£123.75
5	19,998	£81.98	£45.08	£127.07
6	14,470	£53.66	£31.56	£85.22
7	1,566	£8.38	£3.99	£12.37
8	12,815	£67.68	£33.47	£101.15
9	79,641	£299.97	£170.89	£470.86
10	27,004	£122.11	£65.93	£188.04
11	43,601	£160.10	£93.12	£253.22
TOTAL:	259,946	£1,053.18	£584.81	£1,620.20

1-5 (DARTFORD WEST)	80,849	£333.60	£186.70	£527.13
6-8 (DARTFORD EAST)	28,851	£126.30	£69.10	£198.74
9-11 (OUTSIDE BOROUGH)	150,246	£571.60	£332.90	£912.12

Source: Appendix A2, Tables 1-5.

Notes: 2019 Borough population figures (zones 1-8) sourced from Dartford Borough Council. Population figures outside of Borough (Zones 9-11) sourced from Experian Business Strategies – 'Retail Area Planner Population and Expenditure Datasets'. Available expenditure per zones derived from average expenditure per capita figures sourced from Experian Business Strategies MMG3 reports.

9.7 The forecast growth in the Study Area population and expenditure by zones is described in detail in Section 10.

HOUSEHOLD TELEPHONE INTERVIEW SURVEY

9.8 The research methodology, questionnaire and full 'weighted' survey results are set out in Appendix B to this study.

9.9 NEMS Market Research (NEMS) carried out telephone interviews in October/ November 2019 of some 1,019 households. These were conducted with the person responsible for the main household shop. NEMS subsequently weighted the responses across the Study Area and Zones by the zonal populations to ensure that the results of respondents in more sparsely/heavily populated areas were not under or over represented by the market share analysis.

9.10 The survey results help to identify broad patterns and preferences for different types of retail (convenience and comparison goods) shopping purchases as well as the impact of SFT/online shopping on expenditure of different categories of food and non-food goods. The survey findings are used to inform the baseline market share analysis and the centre/store turnover estimates that underpin the quantitative retail capacity assessment. The market share analysis is set out in

⁵³ Special Forms of Trading comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

Appendix A3 for convenience goods and Appendix A4 for comparison goods. At this stage the market share analysis includes expenditure on ‘*Special Forms of Trading*’⁵⁴ (SFT), but excludes all ‘null’/‘void’ responses. It should be noted that SFT is excluded for the economic capacity assessment in line with standard approaches (see Section 10).

MARKET SHARE ANALYSIS

Comparison Goods

- 9.11 Comparison goods are generally defined as items purchased less frequently and include clothing, footwear, household and recreational goods. The household survey (Appendix B) comprised questions on the following main groupings of non-food expenditure⁵⁵:

Table 9.2: Main Categories of Comparison Goods Expenditure

Household Survey Question:	Where do households normally shop for:	See Appendix A4
Q12	Main clothing & footwear (fashion) items	Table 2
Q13	Other clothing & footwear (fashion) items	Table 3
Q15	CDs, vinyl, DVDs, Blurays, etc. (excluding gaming)	Table 4
Q16	Audio-visual, photographic, computer and other domestic electrical goods	Table 5
Q17	Books, stationery and drawing materials	Table 6
Q18	Games & toys, pets and pet products, hobby items, sport clothing / footwear and equipment, camping goods, bicycles and musical instruments	Table 7
Q19	Furniture, carpets, other floor coverings and household textiles	Table 8
Q20	DIY goods, decorating supplies and garden products	Table 9
Q21	Personal care, other medical and pharmaceutical products and therapeutic appliances	Table 10
Q22	All other goods including jewellery & watches, glassware, china, tableware and household utensils, and other personal effects	Table 11

- 9.12 Table 1 (Appendix A4) sets out the market shares for **all** comparison goods expenditure allocated to the main centres and stores, weighted by the different expenditure categories.
- 9.13 In summary the market share analysis shows **SFT** (including internet purchases) accounts for a 19.5% market share of all comparison goods expenditure within the widely defined Study Area; ranging from a high of 26.3% in Zone 9 to a low of 8.2% in Zone 8.
- 9.14 The market shares for the different retail expenditure categories also highlight the different impacts of online shopping on different types of goods and purchases (see Tables 2-10). The table below summarises the key findings:

⁵⁴ Special Forms of Trading comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

⁵⁵ As defined by Experian Business Strategies

Table 9.3: SFT Market Shares by Retail Expenditure Category

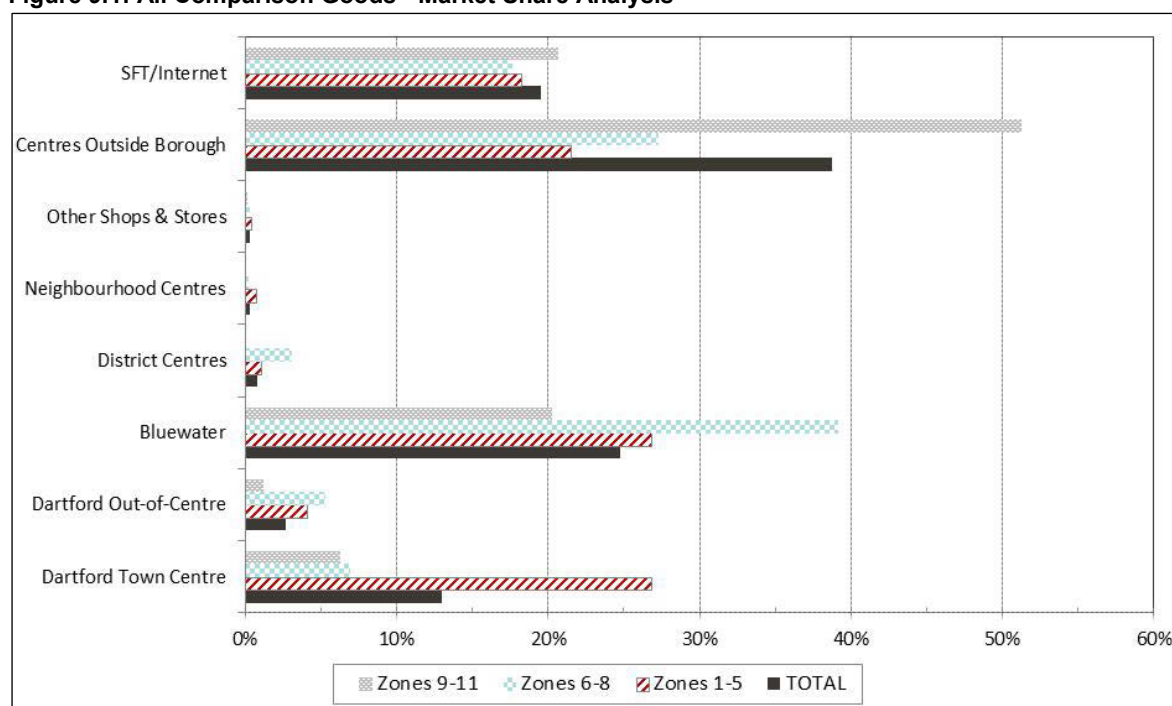
		Zones 1 5	Zones 6 8	TOTAL:
Q12	Main clothing & footwear (fashion) items	17.6%	10.6%	18.6%
Q13	Other clothing & footwear (fashion) items	16.9%	23.9%	18.7%
Q15	CDs, vinyl, DVDs, Blu-ray, etc. (excluding gaming)	45.6%	49.5%	51.0%
Q16	Audio-visual, photographic, computer and other domestic electrical	24.0%	21.6%	28.7%
Q17	Books, stationery and drawing materials	29.6%	33.1%	30.9%
Q18	Games/toys, pets/pet products, hobby items, sport clothing / footwear /equipment, camping, bicycles and musical instruments	30.1%	28.5%	29.4%
Q19	Furniture, carpets, other floor coverings and household textiles	16.4%	15.4%	20.1%
Q20	DIY goods, decorating supplies and garden products	1.8%	3.1%	3.4%
Q21	Personal care, other medica/ pharmaceutical/ therapeutic appliances	5.8%	7.5%	5.5%
Q22	All other goods including jewellery & watches, glassware, china, tableware and household utensils, and other personal effects	15.8%	19.2%	14.5%

9.15 As the table shows SFT/online shopping accounts for a relatively high market share of expenditure on recording media (e.g. CD, DVDs, records, etc.), electrical items, books, games, toys, etc.. This explains the decline in (physical) retailers selling these types of goods from traditional high streets and shopping locations over the last decade (see Section 4).

9.16 In contrast, SFT/online currently accounts for a smaller proportion of total expenditure on DIY/decorating/garden products and personal care/medical products/etc.. The latter is important to the relative health of centres, as they generally include a pharmacy amongst their retail and service offer.

9.17 The figure below summarises the market shares for all comparison goods shopping across the total Study Area. It also shows the market shares for centres and stores in Zones 1-5 (Dartford Borough West), 6-8 (Dartford Borough East) and 9-11 (Outside Borough Area).

Figure 9.1: All Comparison Goods - Market Share Analysis



Source: Appendix A4, Table 1

9.18 The main headlines for the Borough's centres and stores are as follows:

- **Dartford Town Centre:** is achieving a 13% market share across the total Study Area and 21.4% within the Borough. Its market share is highest within Zones 1-5 (26.9%) and significantly lower in Zones 6-8 (6.9%) and 9-11 (6.3%) due to the impact of competing centres and shopping locations.
- **District Centres:** are achieving a market share of 0.8% across the Study Area and 1.6% in the Borough. The highest market share achieved by the District Centres in Zones 6-8 of 3.1% is largely accounted for by Longfield (2.1%). Swanscombe is achieving a 0.9% market share in Zones 6-8.
- **Neighbourhood Centres:** have a limited market share across the Study Area (0.3%) and within the Borough (0.6%). This reflects their role as principally meeting the more frequent convenience and service needs of their local (walkable) catchment populations and passing car-borne trade.
- **Bluewater:** is capturing almost one-quarter (24.8%) of comparison goods expenditure in the Study Area and 30.3% in the Borough. Its market share ranges from a high of 71.8% in Zone 8 to 21.2% in Zone 9. However, even in Zone 9 it is achieving the second highest market share of any centre and/or shopping location after Bexleyheath (40.4%).
- **Out-of-Centre Stores:** The Borough's out-of-centre stores and shopping locations selling non-food goods are Wickes (Overy Street), Homebase/Argos (Princes Road), Dartford Heath Retail Park (Dunelm, Halfords, Jollyes Pets and Topps Tiles) and Asda (Crossways Boulevard, Greenhithe). Together they are achieving a total market share of 4.4% within the Borough and 2.6% across the Study Area. The market shares range from 5.3% in Zones 6-8, to 4.1% in Zones 1-5 and 1.2% in Zones 9-11.

9.19 Overall the Borough's centres and stores are achieving a 58.8% market share within the Borough and 41.7% across the wider Study Area. Bluewater accounts for the majority of this market share in the Borough (30.3%), followed by Dartford Town Centre (21.4%). The Borough's other out-of-centre stores and shopping locations have a more limited share. After taking account of the market share of SFT/internet shopping in the Borough area (18.1%), this means that some 23.1% of expenditure is "leaking" to other centres and stores outside the Borough.

9.20 Dartford Borough's centres and stores are achieving higher 'retention levels' of 60.2% in Zones 1-5 and 55% in Zones 6-8. The market share outside the Borough (Zones 9-11) is also relatively high at 28%, but this is explained by Bluewater's wide catchment and market share in Zones 9 (21.2%), 10 (50.4%) and 11 (49.5%).

9.21 The market shares of the main competing locations are shown in the table below.

Table 9.4: Market Shares of Competing Centres/Stores

Centre / Stores	Dartford West (Zones 1 5)	Dartford East (Zones 6 8)	Outside Borough (Zones 9 11)	TOTAL (Zones 1 11)	BOROUGH AREA (Zones 1 8)
Crayford	12.4%	3.8%	9.2%	9.6%	10.0%
Gravesend	0.8%	12.3%	10.2%	7.4%	4.0%
Bexleyheath	1.4%	0.4%	12.5%	7.4%	1.1%
Lakeside	3.0%	4.7%	3.7%	3.6%	3.5%
Swanley	0.6%	0%	3.6%	2.2%	0.4%
Erith	0.1%	0%	3.3%	1.8%	0%
All Stores Outside Borough	3.2%	6.1%	8.8%	6.6%	4.0%
TOTAL:	21.5%	27.3%	51.3%	38.7%	19.1%

Source: Appendix A4, Table 1

9.22 In summary the table shows:

- **Crayford:** is achieving the highest market share of all the competing centres and shopping locations, with the highest penetration in Zones 1-5 (12.4%). Located in the London Borough of Bexley, and immediately west of Dartford, the Tower Retail Park on the Crayford Road (A207) is the main draw and is owned by Nuveen Retail Estate. It has a total estimated gross floorspace of 14,865 sqm⁵⁶ and its tenants include: Next (927 sqm), Currys/PC World, Boots, Smyths Toys (1,160 sqm), Poundland, Sports Direct (792 sqm), Hobbycraft and Pets at Home⁵⁷. Other popular stores in Crayford include Wickes and Asda opposite the retail park.
- **Gravesend:** is ranked second with Bexleyheath in terms of its market share (7.4%) across the Study Area and has the highest penetration in Zones 6-8 (12.3%). Apart from the shops and stores in the town centre, the other main shopping destinations include Imperial Retail Park on Thomas Way, which is owned by Orchard Street Investment Management LLP. The retail park has a total estimated gross floorspace of 11,973 sqm and the main tenants include: B&Q, Harveys, Carpetright, Lidl, Poundland, Pets at Home and Halfords.
- **Bexleyheath:** is also achieving a market share across the total Study Area of 7.4% and has the highest share in Zones 9-11 (12.5%). Located in the London Borough of Bexley the town centre's retail offer is anchored by the Broadway Shopping Centre, which is owned by New River. The centre has over 65 retail, leisure and service outlets trading from a total gross floorspace of circa 48,282 sqm gross and is served by over 1,300 car parking spaces. The main retailers include: Argos, Boots (1,858 sqm gross), H&M (1,858 sqm), M&S (7,897 sqm), Monsoon, New Look, River Island, TK Maxx, WH Smith/Post Office and Wilko.
- **Lakeside:** is achieving the fourth highest market share (3.6%) of the competing centres and shopping destinations in the Study Area. It is a large out-of-town shopping centre located in West Thurrock, in the borough of Thurrock, Essex. It was constructed on the site of a former chalk quarry and opened before Bluewater in October 1990. The shopping centre has over 250 shops trading from a total estimated floorspace of 133,200 sqm, and over 50 cafés and restaurant, served by some 12,000 car parking space. In addition to the shopping centre there are a number of retail parks that together form one of the largest shopping destinations in Europe, with almost 240,000 sqm of total estimated retail floorspace. The shopping centre was rebranded as 'Intu Lakeside' in 2013.
- **Swanley:** is located on the A20, approximately 1 mile from junction 3 of the M25 in Sevenoaks District, just south of Dartford Borough's southern boundary. It is achieving a market share of 2.2% across the total Study Area, but has a limited share of comparison goods expenditure in Dartford Borough. The town centre's retail offer is anchored by the Swanley Shopping Centre which extends to circa 7,884 sqm gross and is owned by Development Securities Plc. The shopping centre's main tenants include: Asda, Iceland, Boots and Superdrug.
- **Erith:** has a market share of 1.8% across the total Study Area and also has a limited market share in Dartford Borough. The town is located in the London Borough of Bexley and its retail offer is dominated by the Riverside Shopping Centre which has over 35 retailers trading from a total floorspace of 15,329 sqm, served by some 147 parking spaces (the neighbouring Morrisons car park also provides some 670 parking spaces). The centre is owned by Evolve Estates and its main tenants include: Matalan, Iceland, Wilko and Argos.

9.23 The market share analysis confirms the significant impact that online shopping has had on comparison goods shopping patterns and purchases, and on specific retail expenditure categories across the Study Area (see Table 8.3). This is further illustrated by the fact that the market share of

⁵⁶ Source: All floorspace figures quoted for competing centres have been sourced from 'Completely Retail'

⁵⁷ The tenant mix of the competing shopping locations was accurate as at June 2020

online shopping in Zones 1-5 of 18.3% is broadly equivalent to two-thirds of Dartford Town Centre's market share of 26.9%.

- 9.24 As the table below shows, the analysis also confirms the strong attraction and draw of Bluewater for different types of comparison goods purchases compared with Dartford Town Centre.

Table 9.5: Market Shares of Dartford TC, Bluewater and Online in Total Study Area (Zones 1-11)

	Centre / Stores	Dartford TC	Bluewater	SFT/Online
Q12	Main clothing & footwear (fashion) items	12.0%	42.4%	18.6%
Q13	Other clothing & footwear (fashion) items	13.0%	27.0%	18.7%
Q15	CDs, vinyl, DVDs, Blurays, etc. (excluding gaming)	6.8%	20.4%	51.0%
Q16	A-V, photographic, computer & other electrical goods	3.5%	23.7%	28.7%
Q17	Books, stationery and drawing materials	16.7%	21.8%	30.9%
Q18	Games/toys, pet products, hobbies, sport, etc.	7.4%	13.7%	29.4%
Q19	Furniture, carpets, household textiles, etc.	16.5%	15.7%	20.1%
Q20	DIY goods, decorating supplies and garden products	43.6%	0.9%	3.4%
Q21	Personal care, pharmaceutical products, etc.	15.7%	13.4%	5.5%
Q22	All other goods	11.1%	46%	14.5%

Source: Appendix A4, Tables 2-11

- 9.25 Notwithstanding the impact of Bluewater and online shopping on retail expenditure purchases across the Study Area and different Zones, Dartford Town Centre is achieving relatively competitive market shares for purchases of furniture, carpets, household textiles, DIY goods, personal care, medical and pharmaceutical products. It is therefore important for the Town Centre's overall vitality and viability to consolidate and strengthen its market shares in these retail expenditure categories and, where feasible, to maintain and improve its market share across the other categories.

Convenience Goods

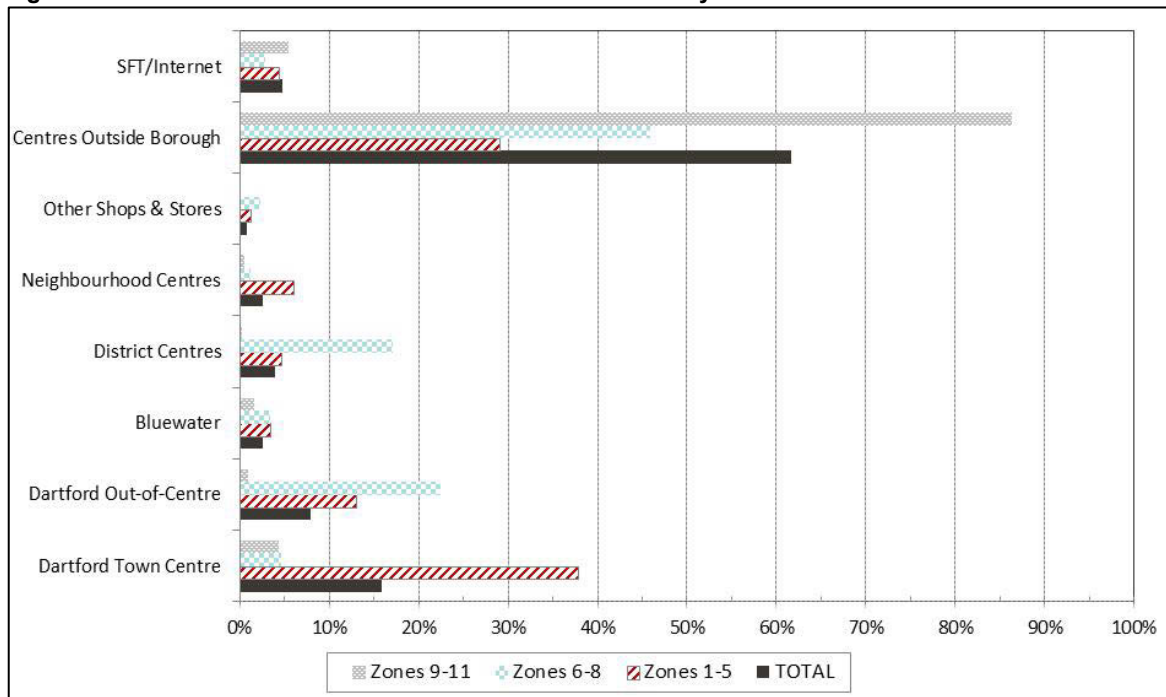
- 9.26 Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing-up liquid, kitchen roll, bin bags, etc.). The total survey-derived market share (%) analysis for all convenience goods shopping is set out in Table 1 (Appendix A3).
- 9.27 The overall market shares have been derived from the assessment of the ('primary') responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. In order to prevent food shopping patterns being 'skewed' by larger superstores and food stores in the Study Area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified (i.e. the 'secondary' responses).
- 9.28 The market shares for the different types of main and top-up food shopping are set out in detail in Tables 2-5 (Appendix A3). The 'primary' and 'secondary' responses for the different types of food shopping have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have applied the following reasonable weightings informed by the survey findings and other studies conducted by LSH over a number of years:

- 60% for main 'bulk' shopping;
- 15% for secondary main 'bulk' shopping
- 15% for primary 'top-up' shopping;
- 10% for secondary 'top-up' shopping

9.29 In summary the market share analysis for all convenience goods shows **SFT** (including internet purchases) accounts for a 4.8% market share.

9.30 The figure below summarises the market shares for all main and ‘top-up’ food shopping across the total study area. It also shows the market shares for centres and stores in Zones 1-5 (Dartford Borough West), 6-8 (Dartford Borough East) and 9-11 (Outside Borough Area).

Figure 9.2: All Food/Convenience Goods - Market Share Analysis



Source: Appendix A3, Table 1

9.31 The main headlines for the Borough’s centres and stores are as follows:

- **Dartford Town Centre:** is achieving a 15.9% market share across the total Study Area and 28.9% share within the Borough area. Its market share is highest within Zones 1-5 (37.9%) and drops significantly in Zones 6-8 (4.6%) and Zones 9-11 (4.4%) due to the impact of competing stores. Sainsbury’s in the Priory Centre and Aldi in the Orchards Shopping Centre have the highest market shares of 14.6% and 11.5% respectively in Zones 1-5.
- **District Centres:** are achieving a market share of 3.9% across the Study Area and 8.1% within the Borough. Longfield accounts for the highest market share (14.3%) achieved by the District Centres in total Zones 6-8 (17.2%), and Waitrose is the main attraction.
- **Neighbourhood Centres:** have a 2.5% market share across the Study Area and 4.8% within the Borough. The convenience stores in the neighbourhood centres at Chastilian Road, Colney Road/St Vincents Road, Henderson Drive (Temple Hill), London Road (Stone) and Birchwood Drive (Joydens Wood) are all achieving relatively good market shares of 0.8% to 1.4% in Zones 1-5.
- **Bluewater:** has a more limited food and convenience store offer, principally comprising Little Waitrose and the food hall in Marks & Spencer. This is reflected by its market share of 2.5% across the total Study Area and 3.5% within the Borough.
- **Ebbfleet:** the new small Co-op convenience store on Talbot Lane is achieving a total market share of 0.5% in Zones 6-8 and 0.2% in the Borough area.
- **Out-of-Centre Stores:** the Asda store at Crossways Boulevard, Greenhithe, is the Borough’s only out-of-centre superstore and it is achieving a total market share of 7.8% across the Study

Area and 15.5% within the Borough. Its market share is highest in Zones 6-9 (22.5%) and Zones 1-5 (13%). The Asda 'Click-and-Collect' store at Sandpit Road recorded a low market share of 0.1% across the Study Area according to the survey results.

- 9.32 Overall the Borough's food and convenience stores are achieving a 62.4% market share within the Borough (Zones 1-8) and 33.6% across the wider defined Study Area (Zones 1-11). Market shares are highest in zones to west of the Borough (66.5% in Zones 1-5) than the east (51.3% in Zones 6-8). This reflects the under-provision of food and convenience stores in the eastern half of the Borough, which includes Ebbsfleet and Bluewater.
- 9.33 It is estimated that some 33.6% of expenditure available within the Borough is currently going to other stores outside the Borough. It follows that this "leakage" of expenditure is higher in Dartford East (45.8%) than in Dartford West (29.1%). The main competing locations and their respective market shares are summarised in the table below:

Table 9.6: Market Shares of Competing Centres/Stores

Centre / Stores	Dartford West (Zones 1 5)	Dartford East (Zones 6 8)	Outside Borough (Zones 9 11)	TOTAL (Zones 1 11)	BOROUGH AREA (Zones 1 8)
Crayford	13.8%	0.7%	20.1%	15.5%	10.3%
Gravesend	2.1%	18.9%	13.1%	10.0%	6.7%
Swanley	6.0%	0.9%	14.5%	9.9%	4.6%
Erith	0.7%	0.3%	14.2%	7.8%	0.6%
Bexleyheath	1.0%	0.2%	11.4%	6.4%	0.8%
Northfleet	1.4%	22.0%	3.6%	5.2%	7.0%
All Stores Outside Borough	4.1%	2.8%	9.4%	6.8%	3.7%
TOTAL:	29.1%	45.8%	86.4%	61.6%	33.6%

Source: Appendix A3, Table 1

- In **Crayford** the Aldi (Roman Way) and Sainsbury's (Stadium Way) stores are achieving higher combined market shares than all other centres across the total Study Area and specifically in Zones 1-5 and 9-11.
 - In **Gravesend/Northfleet** the Asda (Thames Way Imperial Retail Park), Morrisons (Coldharbour Road), Sainsbury's (Wingfield Bank) and, to a lesser, degree Aldi (London Road) and Lidl (Thames Way Imperial Retail Park) account for the relatively high total market shares in Zones 6-8 (40.9%) and Zones 9-11 (16.7%).
 - The most popular stores in **Swanley**, **Erith** and **Bexleyheath** measured by their market shares are Asda (London Road), Morrisons (James Watt Way) and Asda (Broadway) respectively.
- 9.34 In summary, the market share analysis shows that the Borough (Zones 1-8) is retaining 62.4% of available convenience goods expenditure, 33.6% is going to other stores outside the Borough and the residual (4%) comprises online purchases. For some of the Borough's residents those stores located outside the Borough will inevitably be more convenient and accessible to where they live and/or work. This is particularly the case for those living towards the edge of the Borough area.
- 9.35 Notwithstanding this, the market share analysis does highlight a potential qualitative 'gap' in the Borough's foodstore and convenience provision; principally towards the east side of the Borough area covered by Zones 6-8 (which includes Ebbsfleet). The analysis shows that the level of expenditure "leakage" from Zones 6-8 of 45.8% is higher than from Zones 1-5 of 29.1%. This need for new, more sustainable food and convenience store provision to the east of the Borough will be further "*intensified*" by the significant new existing and planned residential and population growth focussed on Eastern Quarry and Ebbsfleet Central (see Section 3).

10. RETAIL CAPACITY ASSESSMENT

10.1 This section sets out the results of the economic retail capacity ('need') assessment for new retail (comparison and convenience goods) floorspace in the Dartford Borough area, including Ebbsfleet. The forecasts cover the period from 2020 to 2036 and are broken down into five year periods (i.e. 2025, 2030, 2035, and 2036). This economic assessment updates and supersedes the capacity findings of the Council's previous evidence-based study published in 2010.

APPROACH: THE CREAT^e MODEL

10.2 The **CREAT^e** economic model has been specifically designed, developed and tested by the LSH team over more than 25 years in accordance with good practice to assess the capacity for new retail (convenience and comparison goods) floorspace. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional and regional level. It has also withstood critical review and examination at numerous appeal, Local Plan and CPO inquiries.

10.3 In brief, the **CREAT^e** (Excel-based) model adopts a transparent '*step-by-step*' approach in which all the key assumptions and forecasts can be easily tested. The model is underpinned by the findings of the household survey, which provides robust profiles of current shopping patterns, market shares and the trading/turnover performance of existing centres, shops and stores.

10.4 At the outset it has necessarily been assumed for the purpose of the capacity assessment that the local retail market in Dartford Borough is broadly in '*equilibrium*' at the base year. In other words, taken together, all existing centres/stores are broadly assumed to be trading in line with expected average ('benchmark') turnover levels, and are not "*over-trading*" or "*under-trading*"⁵⁸. This is a reasonable and robust approach in this case as it reflects the impact of the economic downturn, the significant growth in online sales and the potential impact of COVID-19 on the trading levels and viability of retailers and businesses across the UK. It also reflects the outputs of the health checks and surveys for Dartford Town Centre and the Borough's other main District Centres. For example, there is no evidence of any strong latent demand from retailers for new floorspace across the Borough as a whole, or for its town, district and local centres, that would indicate there is a current under-supply of floorspace.

10.5 For the purpose of this strategic study any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in '**current**' (survey-derived) turnover levels and the growth in '**benchmark**' turnovers based on applying robust year-on-year '**productivity**' ('turnover efficiency') growth rates to all existing and new retail floorspace⁵⁹. This is a standard and accepted approach for all retail capacity and impact assessments carried out to inform both plan-making and decision-taking.

10.6 It is important to restate that medium to long term forecasts should be treated with caution, as they will be influenced by changes in economic, demographic and market trends. As a result we advise that greater weight should be placed on the short term forecasts carried out over a **five-year period** (in compliance with paragraph 004 of the *Planning Practice Guidance*⁶⁰). Notwithstanding this, it is

⁵⁸ Although retailers in the Borough's centres and shopping locations will inevitably trade above or below their company 'benchmark' averages, it is not possible (or a requirement) for strategic studies to assess each retailer's individual trading performance. In general terms "over-trading" normally occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity) in the retail market. However, where individual retailers claim to be "over-trading" this should always be supported by robust corroborating evidence demonstrating overcrowding and congestion in stores and associated car parking, rather than simply by comparison with a retailer's company average turnover.

⁵⁹ Section 4 sets out the forecast growth in annual 'productivity' levels based on the latest Experian Retail Planner Briefing Note.

⁶⁰ PPG Reference ID: 2b-004020190722

also accepted that in preparing town centre strategies local authorities will also need to take account of the forecast capacity for new retail floorspace over the plan period to inform its policy-making and site allocations. The NPPF (paragraph 85) states that local planning authorities should meet the need for retail and town centre uses over a **ten-year period**. Therefore, whilst this study does assess retail capacity up to 2036, the focus should be on forecasts over the next 5-10 year period (i.e. to 2025 and 2030).

- 10.7 The updated capacity forecasts set out in this section provide the Council with a broad guide to assess the (quantitative) need for new retail floorspace in the Borough and its main centres. In turn, this will inform whether it is necessary to identify and allocate sites to meet any forecast need over the lifetime of the development plan. This is in accordance with the advice set out in the NPPF. It follows that the allocation of sites will depend on a range of key considerations, including their suitability, viability and availability to meet the forecast need and, where central sites are not available, to assess the potential to expand existing centres and town centre boundaries.
- 10.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the **CREAT^e** Model in this case are described in more detail below.

POPULATION & EXPENDITURE PROJECTIONS

Baseline Population & Projections

- 10.9 Retail assessments usually defer to the population estimates and projections sourced from Experian Business Strategies (EBS). In this case Experian's trend-based projections (which draw on ONS 2014-based *Sub-National Population Projections*) underestimate the planned growth in the Borough's population, principally due to the substantial new housing developments focussed around Dartford Town Centre and at Ebbsfleet.
- 10.10 DBC has confirmed that a "strategy-based approach" is preferred in this case (i.e. population projections driven by new residential development), as it better reflects the Borough's ability to accommodate a much higher population growth than the trend-based forecasts. DBC's projections are also comparable to the independent forecasts prepared by Kent County Council.
- 10.11 The most recent population projections prepared by DBC for the Borough area are broken down by the wards that make up Zones 1-8 of the study area, and are informed by the policy-based housing development strategy at the time of preparing this study⁶¹.
- 10.12 In the absence of an adopted full housing trajectory over the forecast period, DBC's approach to development (housing numbers) involved the following steps:
- First, to draw on the detailed 5-year housing land supply projection⁶². This is conservatively based on the new national definition of 'deliverable' and provides a good level of certainty (totalling 4,718 homes in five years). DBC can also demonstrate that the Borough has a proven track record in recent years of projected rates of delivery being very close to actual delivery (i.e. on the ground completions). However it still does not include all sites that may come forward on all permitted sites.

⁶¹For those study area zones located outside the Borough area (i.e. Zones 9-11) we have necessarily deferred to the population estimates and projections sourced from EBS using our in-house Experian-based MMG3 Geographic Information System (MMG3 GIS).

⁶²https://www.dartford.gov.uk/data/assets/pdf_file/0011/850727/191031-App-B-Final-Dartford-Five-Year-Land-Supply-2019Rev.pdf

- Second, housing growth defaults to the average level needed in the remaining period to hit the Government's Local Housing Need figure of 797 dwellings per annum for the period as a whole.

10.13 The projections are therefore based on Government policy and also reflect the local reality that very large sites are underway and expected to continue for the next few years. The plan is for the level of growth to decline from this historically high level⁶³, although there is a possible option (currently not preferred) for higher growth (i.e. above 797 per annum over the period).

10.14 **Although not preferred, we have also tested the impact of this higher population growth scenario on the capacity forecasts at the end of this section.**

10.15 It should be noted at the outset that some variation in housing delivery and population growth either above or below the levels tested by this study will not have a significant impact on the retail capacity forecasts per se. Notwithstanding this, care is always required in interpreting and applying the results of the quantitative capacity assessment due to the dynamic impacts of wider economic and market trends on shopping patterns and expenditure. We therefore advise that the capacity forecasts are regularly monitored and updated.

10.16 Table 10.1 summarises the projected annual and cumulative delivery of new homes in Dartford Borough up to 2036 as provided by the local planning authority.

Table 10.1: Dartford Borough: Projected Delivery of New Homes and Population, 2020-2036

YEAR ENDING MARCH:	PROJECTED NEW HOMES (CUMULATIVE)	PROJECTED POPULATION GROWTH (CUMULATIVE)
2020	872	2,218
2025	5,454	13,840
2030	9,134	23,198
2035	12,814	32,481
2036	13,550	34,221

Source: Dartford Borough Council (December 2019). Population based on assumed average household sizes⁶⁴. Also takes account of assumed institutional/non-C3 accommodation and projected population growth.

10.17 Table 1 (Appendix A2) to this study sets out the total estimated growth in the study area population based on DBC's population projections. The table below summarises the forecast growth for the Borough (Zones 1-8) and total Study Area.

Table 10.2: Baseline Population Projections – Total Study Area and Zones (2019-2036)

	Baseline Population & Projections						Growth: 2019-36:	
	2019	2020	2025	2030	2035	2036	%	No.
Zones 1-5 DARTFORD	80,849	81,606	85,392	87,718	90,037	90,499	11.9%	9,650
Zones 6-8 BLUEWATER / EBBSFLEET	28,851	30,436	38,361	45,447	52,504	53,909	86.9%	25,058
BOROUGH AREA TOTAL:	109,700	112,042	123,753	133,165	142,541	144,408	31.6%	34,708
Zones 9-11 OUTSIDE BOROUGH	150,246	151,889	159,934	167,615	174,983	176,393	17.4%	26,147
STUDY AREA - TOTAL:	259,946	263,931	283,687	300,780	317,524	320,801	23.4%	60,855

Source: Dartford Borough Council (December 2019). See Table 1 (Appendix A2).

⁶³ see Dartford Borough Council – new Local Plan Preferred Options Consultation Document

⁶⁴ It should be noted that the Borough has long had declining (but above average) household sizes. Also note that no modification is made for changing household size due to the nature of housing product (e.g. flats versus large houses). Family-sized houses are expected to continue to be a significant part of new homes in Dartford (Preferred Options consultation document) and therefore the population growth due to new homes could be higher than forecast.

10.18 The total Borough area population is forecast to increase by +31.6% (+34,708 people) between 2019 and 2036, from 109,700 to 144,408⁶⁵. The population in the Ebbsfleet/Bluewater area (Zones 6-8) is forecast to increase substantially by +82.3% (+25,058 people), from 28,851 in 2020. Most of this growth is concentrated in Zone 7, which covers Ebbsfleet, where the population is projected to increase by 22,678 people; from 1,566 in 2019 to 24,244 by 2036. This reflects the significant new regeneration and housing development committed, planned and proposed for Ebbsfleet.

Average Expenditure Per Capita Levels

10.19 Tables 2 and 4 (Appendix A2) set out the average retail expenditure per capita estimates and forecasts for convenience and comparison goods respectively.

10.20 The 2019 average expenditure per capita figures have been derived from our in-house MMG3 GIS⁶⁶. The year-on-year growth by zone draws on the latest forecasts by Experian in *Retail Planner Briefing Note 18* (RPBN18), published in October 2020.

10.21 It is standard practice in retail assessments to deduct the current and forecast market shares for non-store retail expenditure (i.e. Special Forms of Trading) from the average expenditure per capita figures over the study period. In line with Experian forecasts, an allowance is normally made to reflect the fact that a proportion of retail sales are sourced from traditional ('physical') stores (such as through 'click-and-collect' channels), rather than from dedicated ('dot com') warehouses.

10.22 To help inform our assessment we have considered the following two different SFT market share scenarios:

- **Scenario 1: Experian-based SFT market shares:** based on Experian's forecasts from 2019 to 2036, as set out in RPBN18 and drawn from ONS data.
- **Scenario 2: Survey-adjusted SFT market shares:** this approach recalibrates the 2019 Experian market shares in line with the average SFT market shares derived from the household survey. The forecast growth in the survey-derived market shares are then extrapolated forward to 2036 in line with Experian's national growth forecasts.

10.23 As Table 2 (Appendix A2) shows the survey-derived market share of 1.4% for **convenience goods** at the base year is lower than the Experian figure of 4.2%. For **comparison goods** the survey-derived SFT market share of 14.7% is also below the national average of 17.6% (see Table 4, Appendix A2).

10.24 In our judgement Experian's higher SFT market shares are most likely to reflect the growth and impact of online shopping on current and future retail expenditure at the local level; particularly as the growth of online shopping by households has been further accelerated by the COVID-19 pandemic. For this reason we consider the capacity forecasts derived from the Experian-based SFT market shares are more robust and are preferred in this case.

10.25 Furthermore, if the growth in SFT's market share is higher than forecast by Experian - which we believe it could be given current trends - then this will further *reduce* the total residual expenditure capacity available to support existing and new floorspace over the forecast period (i.e. more retail expenditure will be spent online than in 'physical' stores).

⁶⁵ Although it should be noted that 2036 population projection is slightly lower than the KCC development strategy-based projection of 147,500.

⁶⁶ All expenditure and turnover figures are expressed in 2017 prices.

Total Available Retail Expenditure

10.26 Tables 3 and 5 (Appendix A2) set out the current and forecast growth in total available expenditure for convenience and comparison goods respectively based on the different SFT market share scenarios. The differences in the forecasts are summarised in the table below.

Table 10.3: Forecast growth in retail expenditure in catchment based on different SFT scenarios (£m)

	2019	2019	2020	2025	2030	2035	2036	GROWTH: 2019-2036	
	Incl SFT	Excluding SFT						%	£m
COMPARISON GOODS - AVAILABLE EXPENDITURE (£m):									
Secenario 1: Experian-based SFT Market Shares	£1,053	£868	£755	£965	£1,152	£1,387	£1,441	66.1%	£574
Secenario 2: Survey-Derived SFT Market Shares	£1,053	£899	£793	£1,017	£1,223	£1,478	£1,536	70.9%	£637
Difference between Scenarios 1 & 2:	£0	-£31	-£37	-£53	-£71	-£91	-£95		-£64
CONVENIENCE GOODS - AVAILABLE EXPENDITURE (£m):									
Secenario 1: Experian-based SFT Market Shares	£585	£560	£603	£612	£648	£687	£694	23.9%	£134
Secenario 2: Survey-Derived SFT Market Shares	£585	£576	£630	£639	£679	£721	£730	26.6%	£153
Difference between Scenarios 1 & 2:	£0.0	-£16	-£27	-£27	-£31	-£35	-£35		-£19

10.27 Experian's higher SFT market share forecasts result in lower retail expenditure growth forecasts for both convenience goods (-£19m) and comparison goods (-£64m) at 2036.

10.28 For the reasons set out above we have assessed the capacity for new retail floorspace in Dartford Borough and its main centres based on Experian's SFT market share forecasts (Scenario 1).

TURNOVER ESTIMATES & FORECASTS

10.29 As described above, retail capacity assessments are generally based on the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers (based on applying robust year-on-year floorspace 'productivity' growth rates). The key assumptions and forecasts are summarised below.

Market Share Analysis (excluding SFT)

10.30 The survey-derived (%) market shares reported in Section 9 have been recalibrated to exclude SFT from both convenience goods (Table 1, Appendix A5) and comparison goods (Table 1, Appendix A6) expenditure over the forecast period.

10.31 The expenditure allocated to existing centres, stores and floorspace at 2019 (Table 2) has then been projected forward to 2020 (Table 3), 2025 (Table 4), 2030 (Table 5), 2035 (Table 6) and 2036 (Table 7) assuming constant market shares. The 'constant market share' approach is standard practice for retail capacity assessments.

10.32 Table 1 (Appendix A5) summarises the convenience goods expenditure allocated to the main centres and stores over the forecast period (excluding 'inflow') based on the recalibrated market share approach. Table 1 (Appendix A6) summarises the (£m) market share analysis for comparison goods.

'Inflow' / Trade Draw from outside Catchment Area

10.33 In order to provide a complete picture of the current and likely future trading (turnover) performance of the main centres and stores in the Borough we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the widely defined study area. The assessment of inflow is not an "exact science" due to the complex nature of overlapping catchments and shopping patterns. In this case our assumptions take account of:

- the scale, quality and mix of each centre's retail (convenience and comparison) offer based on the results of the healthchecks;

- the scale, offer and location of all other centres and stores in Dartford Borough and neighbouring local authority areas;
- the likely competition from centres, stores and shopping facilities outside the study area, informed by the results of the survey-derived market share analysis;
- the likely retail expenditure derived from people visiting the Borough's shops and stores, but who live outside the study area (including tourists, visitors and those on business);
- the likely extent of each centre's catchment (for Dartford Town Centre this is informed, in part, by the results of the in-centre survey); and
- previous studies and relevant retail assessments⁶⁷.

10.34 In summary for the purpose of this economic capacity assessment we have assumed for **comparison goods** that Dartford Town Centre draws approximately 10% of its total turnover from outside the defined catchment area. Bluewater has a much wider catchment area and we estimate that it is achieving a trade draw of approximately 70%. In contrast, the Borough's smaller centres and villages will draw the majority of their trade from their more local resident catchments, with limited 'inflow' from outside the study area.

10.35 For **convenience goods** the market share analysis confirms that households normally carry out their main and top-up food purchases at their more local and accessible stores, and do not generally travel longer distances for food purchases. Based on the location, scale, choice and quality of foodstores both within and outside the Borough area we have assumed a more limited trade draw to centres and stores from outside the widely defined catchment area.

10.36 These trade draw estimates for both convenience and comparison goods are held constant over the forecast period.

Survey-Derived Turnovers

10.37 The assessment of the total turnover of all the main shopping locations within the Catchment Area is derived from the expenditure allocated to centres/stores. This allocation is derived from: (i) the survey-derived market shares; and (ii) informed judgements as to the likely trade draw of each shopping location from outside the defined catchment. The convenience and comparison goods turnover forecasts are set out below.

Convenience Goods

10.38 The total estimated convenience goods turnovers of the Borough's main centres, stores and shopping locations are set out in:

- **Appendix A8 (Table 2):** for Scenario 1 (i.e. Experian's SFT market shares); and
- **Appendix A10 (Table 2):** for Scenario 2 (the survey-derived SFT market shares).

10.39 The Scenario 1 turnover forecasts are summarised in Table 10.4 below.

⁶⁷ Including, for example, the *Retail Impact Assessment* (RIA) prepared by Quod in October 2016 on behalf of Blueco Limited and Bluewater Outer Area Limited in support of application ref: 16/01207/OUT; and the independent appraisal carried out by Carter Jonas ('CJ') in January 2017

Table 10.4: Total Forecast Convenience Goods Turnover of All Centres/Floorspace in Borough (£m)

	Turnover (£ million)					GROWTH (%)	
	2020	2025	2030	2035	2036	2020-30	2020-36
DARTFORD TOWN CENTRE	£98.2	£98.9	£102.6	£106.7	£107.5	5%	9%
BLUEWATER	£53.1	£57.4	£64.1	£71.0	£72.4	21%	36%
DISTRICT CENTRES:	£35.7	£35.2	£36.5	£38.0	£38.2	2%	7%
NEIGHBOURHOOD CENTRES:	£14.9	£15.3	£16.5	£17.8	£18.0	11%	21%
OTHER PARADES / STORES:	£4.8	£6.5	£8.2	£9.9	£10.2	71%	114%
ALL OUT OF CENTRE STORES IN BOROUGH:	£55.6	£59.0	£64.1	£69.5	£70.5	15%	27%
TOTAL ESTIMATED TURNOVER:	£262.3	£272.4	£292.0	£312.8	£316.8	11%	21%

Source: Appendix A8, Table 2.

Notes: All turnover forecasts assume constant market shares within the study area and trade draw from outside the study area.

10.40 As the table shows, under **Scenario 1** Dartford Town Centre's food and convenience stores are estimated to achieve a total turnover of £98.2m in 2020. This is significantly higher than for all the other stores and centres in the Borough area, including Bluewater and the out-of-centre foodstores. The town centre's convenience turnover is forecast to increase by +9% to £107.5m by 2036.

10.41 Dartford Town Centre's total convenience goods turnover is estimated to be slightly higher in 2020 under **Scenario 2** at £102.5; increasing to £112.9m (+10%) by 2036 (Appendix A10, Table 2).

10.42 It should be noted that the retail expenditure generated by new residential developments and population growth across the study area has been allocated to existing centres/stores assuming constant market shares. For example, the expenditure growth generated by the new residential development planned for Ebbsfleet (Zone 7) is allocated to existing centres and stores based on their current market shares within the Ebbsfleet zone. The high-level strategic retail capacity assessment does not predict the potential market shares and impacts of new planned retail floorspace, as these are treated as commitments in the modelling.

Comparison Goods Turnover

10.43 The total estimated comparison goods turnovers of the Borough's main centres, stores and shopping locations under Scenario 1 are set out in Table 2 (Appendix A6) and summarised in Table 10.5 below.

Table 10.5: Total Forecast Comparison Goods Turnover of All Centres/Floorspace in Borough

	Turnover (£ million)					GROWTH (%)	
	2020	2025	2030	2035	2036	2020-30	2020-36
DARTFORD TOWN CENTRE	£133.9	£166.5	£193.1	£226.4	£234.1	44%	75%
BLUEWATER	£773.0	£1,014.1	£1,238.3	£1,519.8	£1,585.0	60%	105%
DISTRICT CENTRES:	£9.0	£10.9	£12.4	£14.2	£14.7	37%	63%
NEIGHBOURHOOD CENTRES:	£2.5	£2.9	£3.3	£3.8	£4.0	36%	61%
OTHER PARADES / STORES:	£2.7	£3.4	£4.2	£5.1	£5.3	57%	100%
ALL OUT OF CENTRE FLOORSPACE IN BOROUGH:	£29.3	£38.7	£47.1	£57.7	£60.2	61%	105%
TOTAL ESTIMATED TURNOVER:	£950.3	£1,236.5	£1,498.4	£1,827.1	£1,903.2	58%	100%

Source: Appendix A6, Table 2.

10.44 Under **Scenario 1** Dartford Town Centre's comparison goods turnover is forecast to increase by +75% (or +4.7% per annum) between 2020 and 2036, from £133.9m to £234.1m. Bluewater's turnover is forecast to increase by +105% (+6.6% per annum), to £1,585m by 2036.

10.45 The lower comparison goods turnovers of the Borough's smaller District and Neighbourhood Centres and other parades/stores reflects their more limited non-food offer and their primary roles as meeting the more frequent essential food/convenience, service and community needs of their local populations.

10.46 Under **Scenario 2** (the lower survey-based SFT market shares) Dartford Town Centre's turnover is forecast to increase from £140.6m in 2020 to £249.5m by 2036 (+77%). Bluewater's comparison goods turnover of £811.4m in 2020 is forecast to increase to £1,689.1m by 2036.

Floorspace Productivity

10.47 As described in Section 4, existing retailers in the current economic and retail climate will need to achieve strong annual floorspace 'productivity' growth rates to absorb increasing costs (including, for example, rising rents, business rates and wages) in order to remain profitable and viable. This is particularly the case as the competition from online retailing increases, as the costs incurred by 'virtual' retailers are significantly lower than for 'physical' retailers. It will also be vital to support the viability of retail businesses as the country and retail sector recovers from the impact of COVID-19 on shopping preferences and retail expenditure. In this context we have assumed the following annual 'productivity' growth rates, informed by the forecasts set out in Experian's latest *Retail Planner Briefing Note* (see Section 4):

- For **comparison goods**: annual growth rates of -14.1% in 2020 to reflect the impact of COVID-19, +10.1% in 2021, +4.5% in 2022, +3% for the period 2023-2027 and +2.9% for 2028-2036.
- For **convenience goods**: annual growth rates of +5.4% for 2020, -4.8% for 2021, +0.7% for 2022 and +0.3% for the period 2023-2036.

10.48 These 'productivity' growth rates have been applied to the baseline survey-derived turnover estimates at 2019 to forecast the 'benchmark' turnovers of the main centres, stores and shopping locations over the study period. It is the difference between the growth in the survey-derived turnovers and the 'benchmark' turnovers that informs the forecasts of retail floorspace capacity.

BASELINE RETAIL CAPACITY (excluding commitments)

10.49 The capacity forecasts for new retail floorspace up to 2036 under **Scenario 1** are set out in:

- Tables 3-9 (Appendix A7) for convenience goods; and
- Tables 3-9 (Appendix A8) for comparison goods⁶⁸.

10.50 The footnotes to Table 3 explain the key steps underpinning the capacity assessment.

10.51 For the reasons set out above, we consider the Scenario 1 capacity forecasts are more robust and realistic in this case, as they reflect the likely higher growth in online shopping's market share of retail expenditure across the Borough up to 2036; particularly when considered in the context of the impact of COVID-19 on household shopping purchases.

10.52 Although the forecast under Scenario 1 are preferred, Appendix A9 also sets out the capacity forecasts derived from **Scenario 2** (survey-derived SFT market shares) by way of comparison.

10.53 It should be noted that at this initial stage we have not assessed the impact of the forecast turnover of known retail floorspace commitments or planned allocations on the overall capacity forecasts.

⁶⁸ Please note that all quoted retail floorspace capacity figures refer to net sales area unless otherwise stated.

Convenience Goods Capacity

10.54 The table below summarises the 'baseline' residual expenditure and floorspace capacity forecasts for convenience goods in Dartford Borough (excluding commitments) under Scenario 1 (Appendix A7), compared with Scenario 2.

Table 10.6: Dartford Borough – Convenience goods capacity forecasts (excluding commitments)

	2020	2025	2030	2035	2036
SCENARIO 1: Experian SFT Market Shares					
Residual Expenditure Capacity (£m):	-	£18.7	£34.4	£51.4	£54.6
Retail Floorspace Capacity (net sq m)	-	1,934	3,507	5,159	5,401
SCENARIO 2: Survey-derived SFT Market Shares					
Residual Expenditure Capacity (£m):	-	£19.3	£37.1	£55.6	£59.2
Retail Floorspace Capacity (net sq m)	-	1,999	3,774	5,577	5,853

10.55 To convert the forecast residual expenditure into a net sales area we have assumed an average sales density (or 'turnover to floorspace ratio') for new convenience goods floorspace of circa £10,000 per sqm in 2020⁶⁹. This average sales density remains relatively constant up to 2036 in line with Experian's forecasts of annual 'productivity' growth. As the table shows:

- **Scenario 1:** forecast capacity for 1,934 sqm net of new convenience floorspace in the Borough at 2025, increasing to 3,507 sqm net by 2030 and 5,401 sqm net by 2036.
- **Scenario 2:** there is a slightly higher forecast capacity for 5,853 sqm net of new convenience goods floorspace by 2036.

Comparison Goods Capacity

10.56 The residual expenditure and floorspace capacity forecasts under Scenarios 1 and 2 (excluding commitments) are summarised below.

Table 10.7: Dartford Borough – Comparison goods capacity forecasts (excluding commitments)

	2020	2025	2030	2035	2036
SCENARIO 1: Experian SFT Market Shares					
Residual Expenditure Capacity (£m):	-	£41.7	£117.4	£233.8	£263.7
Retail Floorspace Capacity (net sq m)	-	5,531	13,464	23,247	25,479
SCENARIO 2: Survey-derived Market Shares					
Residual Expenditure Capacity (£m):	-	£49.8	£141.0	£274.1	£307.3
Retail Floorspace Capacity (net sq m)	-	6,607	16,171	27,249	29,686

10.57 For comparison goods we have assumed that new floorspace will achieve an average sales density of circa £6,000 per sqm in 2020⁷⁰. This turnover level is informed by the latest Mintel 'Retail Rankings'

⁶⁹This average turnover level for new floorspace is informed by the latest Mintel 'Retail Rankings' report, which sets out the published company average turnovers for all the main food and non-food retailers in the UK. In this case the assumed average turnover figure of £10,000 per sqm is broadly the midway point between the higher company average turnovers achieved by the 'top 6' grocers (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose, and Marks and Spencer) and the Limited Assortment Discounters ('LADs') (e.g. Lidl and Aldi), and the lower turnovers recorded by smaller format supermarket operators (e.g. Co-op, Nisa, Budgens, etc.).

⁷⁰ It should be noted that average sales levels will vary between different locations, different retail formats and different operators. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when preparing its development plans and when it comes to assessing and determining applications for different operators and different types of retail floorspace in different locations. For example, 'DIY/bulky goods' retailers generally achieve average sales levels below the turnover figures we have tested.

report, which sets out the published company averages and reported performance of a range of multiple and independent retailers. As the table shows:

- **Scenario 1:** forecast capacity for 5,531 sqm net of new comparison goods floorspace by 2025, increasing to 13,464 sqm net by 2030 and 25,479 sqm net by 2036.
- **Scenario 2:** slightly higher forecast capacity of 6,607 sqm net in 2025, increasing to 16,171 sqm net by 2039 and 29,686 sqm net by 2036.

BASELINE RETAIL CAPACITY (including commitments)

10.58 Having established the 'baseline' position, the next step involves "*building in*" the floorspace and forecast turnover of all known retail commitments in the Borough (see Appendix A10)⁷¹. These commitments will take a "*first slice*" of the forecast retail expenditure capacity.

Retail Commitments

10.59 The following sets out the major planned/committed retail floorspace in the pipeline and/or under construction in **Dartford Town Centre** at the time of preparing this study (for more detail on all the commitments please refer to other sections in this study and the footnotes to the tables in Appendix A10). For the purpose of this assessment we have assumed all the town centre retail commitments will be open and trading by 2025.

- **Lowfield Street (Copperhouse Green)** (Table 1, Appendix A10): The Council approved the application (ref: 16/01919/FUL) in September 2017. The illustrative (ground floor) masterplan for the permitted scheme shows the potential for four Class A1 retail units with a total GEA of 626 sqm and frontage on to Lowfield Street. There are two food and beverage units with a gross area of 142 sqm and 164 sqm respectively. We have assumed that the comparison goods floorspace (336 sqm gross) could achieve a turnover of circa £2m in 2025 and the convenience floorspace (292 sqm) could achieve a turnover of £2.3m.
- **Northern Gateway (Mill Pond)** (Table 2): Since the Council approved application 15/00625/REM in 2015 some 400 sqm has been developed to accommodate a new Co-op convenience store and a further 400 sqm for a new gym. This leaves a residual floorspace of 1,782 sqm to be developed. In the absence of detailed plans for this new space, we have made the reasonable assumption that retail floorspace will account for approximately 30% (535 sqm gross) of this residual commercial floorspace. It is assumed that 50% of this retail space will be set aside for the sale of convenience goods and 50% for comparison goods. On this basis the total forecast comparison goods turnover is £1.6m at 2025 and the forecast convenience goods turnover is £2.1m.

10.60 Section 3 (Tables 3.4-3.5) set out the latest retail floorspace schedules for Ebbsfleet Central and Eastern Quarry as provided by EDC and DBC at the time of preparing this study. We have necessarily applied informed judgements to these floorspace schedules to identify the likely split between convenience and comparison goods retailing (gross/net) that could be delivered over the forecast period. Tables 3 and 4 (Appendix A10) set out our estimates of the likely turnover and phased delivery of the planned retail floorspace. In summary:

- **Ebbsfleet Central** – It is assumed all the retail floorspace will be open and trading by 2036. For the part of the development located in Dartford Borough only, the estimated convenience floorspace (3,837 sqm net) is forecast to achieve a total turnover of £38.4m by 2036 and the comparison floorspace (3,975 sqm net) will achieve a turnover of £41.1m. In total the 10,781

⁷¹ The assessment of planned/committed floorspace and turnover normally focuses on schemes that will deliver circa 250 sqm (gross) or more of net additional Class A1 retail as part of the development.

sqm gross (7,812 sqm net) of planned floorspace is forecast to achieve a total turnover of £79.5m in 2036.

- **Eastern Quarry** – The estimated retail floorspace planned for the three villages could a total amount to 5,850 sqm gross (4,224 sqm net). Of this total floorspace, we estimate that approximately 3,274 sqm gross (2,292 sqm net) will be for convenience goods retailing and 2,576 sqm gross (1,932 sqm net) for comparison goods. The total forecast retail (convenience and comparison) turnover at 2036 is estimated to be £42.9m.

10.61 The other major retail permissions/commitments in the Borough are at Bluewater and Galleon Boulevard, as follows:

- **Bluewater – West Village (Table 5, Appendix A10):** The June 2017 permission for the extension to the West Village allows for up to 30,000 sqm Gross External Area (GEA) of new Class A1-A5 floorspace (also see commentary in Section 8). This 2017 permission was conditioned to provide for: a minimum of 51% and a maximum of 28,500 sqm for Class A1 comparison goods retail (condition 32); and a maximum of 2,500 sqm for Class A3-A5 uses (condition 33). Under condition 31 convenience goods (Class A1) retail is restricted to 1% of the net additional floorspace permitted. Based on the evidence submitted in support of the planning application⁷² and the fact that some 4,267 sqm gross of retail (comparison goods) floorspace has been developed to date, we forecast that the residual comparison goods floorspace could achieve a total turnover of £12.4m in 2025 and the smaller (permissible) convenience goods floorspace could achieve a total turnover of £1.9m. However there is some uncertainty at the time of finalising this study whether the committed floorspace will be delivered as planned due to the impact of recent market trends on the retail sector, which have been further accelerated by the impact of the COVID-19 pandemic.
- **Galleon Boulevard (Crossways Business Park) (Table 4):** The Council approved the reserved matters application for a 3-storey mixed use development comprising a retail unit (91 sqm), a (Class A1/A3) coffee shop (116 sqm GIA), and (Class B1) office units to the upper floors⁷³. For the purpose of this assessment we have assumed that the retail (A1) floorspace will accommodate convenience goods retailing only and could achieve a potential turnover of circa £0.7m in 2025.

10.62 In summary all the known committed retail floorspace in the Borough is forecast to achieve a total comparison goods turnover of circa £138.7m in 2025 and a total convenience turnover of £31m.

Baseline Retail Capacity (including all commitments)

10.63 The Borough-wide capacity forecasts for new retail floorspace up to 2036 - after allowing for all known commitments - are set out in Appendix A11 for convenience goods and comparison goods.

10.64 At this stage we have only modelled the impact of commitments on the forecast capacity under Scenario 1, based on Experian's preferred SFT market share forecasts. The table below summarises the outputs of the retail capacity assessment.

⁷² Retail Impact Assessment (RIA) prepared by Quod in October 2016

⁷³ Planning application 17/00493/REM approved in June 2017, pursuant to permission DA/09/01473/VCON

Table 10.8: Dartford Borough – Retail capacity forecasts (including commitments & Ebbsfleet)

	2020	2025	2030	2035	2036
COMPARISON GOODS:					
Residual Expenditure Capacity (£m):	-	-£83.1	-£33.2	£35.7	£55.7
Retail Floorspace Capacity (net sq m)	-	-11,148	-3,879	3,623	5,483
CONVENIENCE GOODS:					
Residual Expenditure Capacity (£m):	-	-£12.3	-£19.6	-£13.1	-£13.8
Retail Floorspace Capacity (net sq m)	-	-1,272	-1,992	-1,310	-1,366

10.65 After allowing for all known retail commitments the forecasts show for:

- **Convenience goods:** no capacity for new floorspace over the short, medium and long term; and
- **Comparison goods:** no capacity for new floorspace over and above that committed and planned for the ten-year period up to 2030. There is forecast capacity for approximately 3,623 sqm net by 2035, increasing to 5,483 sqm net by 2036.

10.66 Any forecast theoretical capacity based on population and residual expenditure growth up to 2036 will be dependent on whether there is any market demand for new floorspace in the Borough, over and above all committed floorspace.

10.67 It should also be noted that the capacity forecasts do not take account of the potential to re-occupy and re-use existing vacant retail floorspace within the Borough's main centres. For example, the vacant, viable and better quality floorspace in Dartford Town Centre's Primary Shopping Area (PSA) should be the first choice to accommodate any forecast capacity and/or market demand over the short to medium term, subject to the assessment of the suitability of this existing floorspace to meet operators' requirements.

REVISED CAPACITY: HIGHER POPULATION GROWTH

10.68 We have also tested the impact of a potentially higher population growth scenario on the retail capacity forecasts. The revised forecasts are set out in Appendix A12 for convenience and comparison goods.

10.69 The higher population projections provided by the Council result in higher expenditure growth in Zones 1 (covering Dartford Town Centre) and Zone 7 (covering Ebbsfleet). The table below summarises the total population growth forecast for the Borough area (Zones 1-8), and for Dartford West (Zones 1-5) and Dartford East (Zones 1-8).

Table 10.9: Revised Population Projections – Higher Growth Scenario

	Revised Population & Projections						High Growth Scenario		Growth: 2019 36:	
	2019	2020	2025	2030	2035	2036	%	No.		
Zones 1-5 DARTFORD WEST	80,849	81,606	85,392	90,118	94,349	95,287	17.9%	14,438		
Zones 6-8 DARTFORD EAST	28,851	30,436	38,361	46,407	54,659	56,302	95.1%	27,451		
BOROUGH AREA TOTAL:	109,700	112,042	123,753	136,525	149,008	151,589	38.2%	41,889		
Zones 9-11 OUTSIDE BOROUGH	150,246	151,889	159,934	167,615	174,983	176,393	17.4%	26,147		
STUDY AREA - TOTAL:	259,946	263,931	283,687	304,140	323,991	327,982	26.2%	68,036		

10.70 The Borough's population is forecast to increase by +38.2% (+41,889 people) between 2019 and 2036, which compares with the baseline population growth of +31.6% (+34,708 people) over the same period (see Table 10.2).

10.71 The table below summarises the revised capacity for new retail floorspace based on the higher population projections and assuming the Experian-based (**Scenario 1**) SFT market shares.

Table 10.10: Revised Capacity Forecasts – Higher Population Growth Scenario

	2020	2025	2030	2035	2036
COMPARISON GOODS:					
Residual Expenditure Capacity (£m):	-	-£97.0	-£35.2	£60.3	£87.1
Retail Floorspace Capacity (net sq m)	-	-12,857	-4,037	5,993	8,416
CONVENIENCE GOODS:					
Residual Expenditure Capacity (£m):	-	-£12.3	-£12.1	£1.1	£1.9
Retail Floorspace Capacity (net sq m)	-	-1,272	-1,235	115	193

10.72 The forecasts show:

- **Convenience goods:** no capacity for new floorspace up to 2030. There is limited capacity for 115 sqm net of new floorspace in 2035, increasing to 193 sqm net by 2036. This scale of new floorspace would support a small convenience store.
- **Comparison goods:** no capacity for new floorspace up to 2030, but potential for 5,993 sqm net by 2035, increasing to 8,416 sqm net by 2036. This compares with 5,483 sqm net of comparison goods floorspace capacity forecast for 2036 under the ‘baseline’ capacity scenario.

ZONAL CAPACITY: DARTFORD TOWN CENTRE & EBBSFLEET

10.73 In order to provide another finer layer of analysis with regard to the potential scale, distribution and location of new retail floorspace in the Borough, we have forecast the potential new retail (comparison and convenience) floorspace that could be supported by the higher population growth projections for Zone 1 (Dartford Town Centre) and Zone 7 (Ebbsfleet) only.

10.74 With a projected growth of 4,620 people between 2020-2036 in Zone 1 and 25,968 over the same period in Zone 7, the total growth in these zones (25,968) represents approximately 80% of the Borough’s total population growth up to 2036 (32,366).

10.75 However it should be noted at the outset that the high-level theoretical capacity forecasts take no account of existing commitments in these zones and/or the fact that a proportion of the expenditure generated will flow to existing shops and stores in Dartford town centre and other shopping locations, rather than necessarily being available to support new retail floorspace. We have also assumed that the “inflow” and “outflow” of expenditure is in equilibrium in Zones 1 and 7.

Zone 1 – Dartford Town Centre

10.76 The high level capacity forecasts for Dartford Town Centre and Ebbsfleet are summarised in the tables below for convenience and comparison goods.

Table 10.11: Zone 1 (Dartford Town Centre) – Baseline Convenience Capacity

ZONE 1 (DARTFORD TOWN CENTRE)	2019	2020	2025	2030	2035	2036
1 Population:	2,645	3,145	5,642	6,609	7,572	7,764
2 Expenditure Per Capita:	£2,315	£2,454	£2,309	£2,301	£2,305	£2,305
3 Total Available Expenditure:	£6.1	£7.7	£13.0	£15.2	£17.5	£17.9
4 Average Sales Density of New Floorspace (£/sqm):		£10,000	£9,673	£9,819	£9,967	£10,118
5 Net Floorspace Capacity (sqm):		-	1,347	1,549	1,751	1,769
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			1,924	2,213	2,502	2,527

Table 10.12: Zone 1 (Dartford Town Centre) – Baseline Comparison Capacity

ZONE 1 (DARTFORD TOWN CENTRE)	2019	2020	2025	2030	2035	2036
1 Population:	2,645	3,145	5,642	6,609	7,572	7,764
2 Expenditure Per Capita:	£3,295	£2,821	£3,332	£3,734	£4,238	£4,354
3 Total Available Expenditure:	£8.7	£8.9	£18.8	£24.7	£32.1	£33.8
4 Average Sales Density of New Floorspace (£/sqm):		£6,000	£7,456	£8,551	£9,865	£10,151
5 Net Floorspace Capacity (sqm):		1,478	2,522	2,886	3,252	3,330
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			3,602	4,123	4,646	4,758

10.77 The tables show that the new population projected for Dartford Town Centre (Zone 1) could generate £17.9m of convenience expenditure and £33.8m of comparison expenditure in 2036. This could theoretically sustain 1,769 sqm net (2,527 sqm gross) of new convenience floorspace and 3,330 sqm net (4,758 sqm gross) of new comparison goods floorspace.

10.78 This capacity assumes that all the expenditure generated is available to sustain new retail floorspace. In reality a proportion of this new retail expenditure will flow to existing shops and stores in Dartford Town Centre to help support their overall vitality and viability, and a proportion of spend will also flow to other shops and stores elsewhere in the Borough and beyond.

10.79 The tables below summarise the impact on the capacity forecasts of applying the higher Zone 1 population growth projections.

Table 10.13: Zone 1 (Dartford Town Centre) – Revised Convenience Capacity

ZONE 1 (DARTFORD TOWN CENTRE)	2019	2020	2025	2030	2035	2036
1 Population:	2,645	3,145	5,642	9,009	11,884	12,552
2 Expenditure Per Capita (excl SFT):	£2,315	£2,454	£2,309	£2,301	£2,305	£2,305
3 Total Available Expenditure:	£6.1	£7.7	£13.0	£20.7	£27.4	£28.9
4 Average Sales Density of New Floorspace (£/sqm):		£10,000	£9,673	£9,819	£9,967	£10,118
5 Net Floorspace Capacity (sqm):		-	1,347	2,111	2,749	2,860
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			1,924	3,016	3,927	4,085

Table 10.14: Zone 1 (Dartford Town Centre) – Revised Comparison Capacity

ZONE 1 (DARTFORD TOWN CENTRE)	2019	2020	2025	2030	2035	2036
1 Population:	2,645	3,145	5,642	9,009	11,884	12,552
2 Expenditure Per Capita (excl SFT):	£3,295	£2,821	£3,332	£3,734	£4,238	£4,354
3 Total Available Expenditure:	£8.7	£8.9	£18.8	£33.6	£50.4	£54.7
4 Average Sales Density of New Floorspace (£/sqm):		£6,000	£7,543	£8,719	£10,059	£10,351
5 Net Floorspace Capacity (sqm):		1,478	2,492	3,859	5,006	5,280
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			3,561	5,512	7,152	7,543

10.80 As the tables shows, the higher forecast population growth results in an increase in the theoretical capacity for new convenience floorspace to 2,860 sqm net by 2036, and an increase in comparison floorspace capacity to 5,280 sqm net.

Zone 7 – Ebbsfleet

10.81 The capacity forecasts for Ebbsfleet are summarised in the tables below for convenience and comparison goods floorspace.

Table 10.15: Zone 7 (Ebbsfleet) – Convenience Capacity

ZONE 7 (EBBSFLEET)	2019	2020	2025	2030	2035	2036
1 Population:	1,566	2,896	9,543	16,243	22,915	24,244
2 Expenditure Per Capita:	£2,440	£2,587	£2,434	£2,426	£2,430	£2,430
3 Total Available Expenditure:	£3.8	£7.5	£23.2	£39.4	£55.7	£58.9
4 Average Sales Density of New Floorspace (£/sqm):		£10,000	£9,673	£9,819	£9,967	£10,118
5 Net Floorspace Capacity (sqm):		-	2,401	4,013	5,587	5,823
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			3,431	5,733	7,981	8,318

Table 10.16: Zone 7 (Ebbsfleet) – Comparison Capacity

ZONE 7 (EBBSFLEET)	2019	2020	2025	2030	2035	2036
1 Population:	1,566	2,896	9,543	16,243	22,915	24,244
2 Expenditure Per Capita:	£4,411	£3,777	£4,461	£5,000	£5,673	£5,830
3 Total Available Expenditure:	£6.9	£10.9	£42.6	£81.2	£130.0	£141.3
4 Average Sales Density of New Floorspace (£/sqm):		£6,000	£7,456	£8,551	£9,865	£10,151
5 Net Floorspace Capacity (sqm):		1,823	5,710	9,497	13,178	13,923
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			8,158	13,567	18,825	19,889

10.82 The forecasts show that the new resident population in Zone 7 could generate £58.9m of convenience goods expenditure and £141.3m of comparison goods expenditure in 2036. This expenditure capacity could support 5,823 sqm net (8,318 sqm gross) of new convenience floorspace by 2036 and 13,923 sqm net (19,889 sqm gross) of comparison floorspace.

10.83 The tables below summarise the impact on the capacity forecasts of applying the higher Zone 7 population growth projections.

Table 10.17: Zone 7 (Ebbsfleet) – Revised Convenience Capacity (higher population growth)

ZONE 7 (EBBSFLEET)	2019	2020	2025	2030	2035	2036
1 Population:	1,566	2,896	9,543	17,203	25,070	26,637
2 Expenditure Per Capita (excl SFT):	£2,440	£2,587	£2,434	£2,426	£2,430	£2,430
3 Total Available Expenditure:	£3.8	£7.5	£23.2	£41.7	£60.9	£64.7
4 Average Sales Density of New Floorspace (£/sqm):		£10,000	£9,673	£9,819	£9,967	£10,118
5 Net Floorspace Capacity (sqm):		-	2,401	4,250	6,112	6,397
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			3,431	6,071	8,732	9,139

Table 10.18: Zone 7 (Ebbsfleet) – Revised Comparison Capacity

ZONE 7 (EBBSFLEET)	2019	2020	2025	2030	2035	2036
1 Population:	1,566	2,896	9,543	17,203	25,070	26,637
2 Expenditure Per Capita (excl SFT):	£4,411	£3,777	£4,461	£5,000	£5,673	£5,830
3 Total Available Expenditure:	£6.9	£10.9	£42.6	£86.0	£142.2	£155.3
4 Average Sales Density of New Floorspace (£/sqm):		£6,000	£7,543	£8,719	£10,059	£10,351
5 Net Floorspace Capacity (sqm):		1,823	5,644	9,864	14,139	15,002
6 Assumed Net/Gross Floorspace Ratio:			70%	70%	70%	70%
7 Gross Floorspace Capacity (sqm):			8,063	14,092	20,199	21,431

10.84 As the tables shows, there is an increase in the theoretical capacity for new convenience floorspace to 6,397 sqm net (9,139 sqm gross) by 2036, and to 15,002 sqm net (21,431 sqm gross) for comparison goods retailing.

10.85 Although theoretical in nature, these high-level forecasts do nevertheless confirm that the new population in Zone 7 should be able to support Ebbsfleet's planned new centres, which are estimated to have a total combined gross floorspace of up to 22,197 sqm gross. This comprises the total retail floorspace currently planned for Ebbsfleet Central (of 12,536 sqm gross) and the main centres in Ebbsfleet Quarry (of 9,661 sqm gross).

SUMMARY

10.86 LSH have carried out a robust assessment to test the capacity for new retail (convenience and comparison goods) floorspace in Dartford Borough up to 2036; including taking account of all known allocated, planned and committed retail floorspace in the Borough at the time of preparing this study.

10.87 We have assessed capacity based on two different population growth scenarios:

- **'Baseline' Capacity:** assumes Dartford Borough's preferred population projections, which are based on predicted Local Housing Need and are in line with Government policy.
- **'Higher Growth' Capacity:** tests the impact of higher population growth on the capacity forecasts, specifically in Zone 1 (Dartford Town Centre) and Zone 7 (Ebbsfleet).

10.88 The capacity forecasts under both scenarios are summarised in the table below.

Table 10.19: Retail Capacity Forecasts (sqm net): ‘Baseline’ and ‘Higher Growth’ Scenarios

	2025	2030	2035	2036
CONVENIENCE GOODS CAPACITY:				
Baseline:	-1,272	-1,992	-1,310	-1,366
Higher Population Growth (Zones 1 & 7 only):	-1,272	-1,235	115	193
COMPARISON GOODS CAPACITY:				
Baseline:	-11,148	-3,879	3,623	5,483
Higher Population Growth (Zones 1 & 7 only):	-12,857	-4,037	5,993	8,416

10.89 There is no forecast capacity for new retail (convenience and comparison) floorspace over the next 10 years, after allowing for all known commitments. Beyond 2030:

- **For convenience goods:** there is limited capacity for 193 sqm net of new floorspace by 2036 under the higher population growth forecast, which would support a small convenience store.
- **For comparison goods:** capacity builds to 5,483 sqm net by 2036 under the ‘Baseline’ scenario and 8,416 sqm net under the ‘Higher Growth’ scenario.

10.90 The finer level ‘Zonal Capacity’ forecasts also test the potential theoretical capacity for new retail floorspace in Dartford Town Centre and Ebbsfleet based only on the projected growth in the populations in their “core” zones (Zones 1 and 7 respectively). The forecasts show for:

- **Dartford Town Centre:** a total forecast capacity of 1,769 sqm net of new convenience floorspace by 2036 under the ‘Baseline’ scenario, increasing to 2,860 sqm net for the ‘Higher Growth’ scenario. For comparison goods the capacity ranges from 3,330 sqm net to 5,280 sqm net.
- **Ebbsfleet:** a total forecast capacity for 5,823 sqm net of new convenience floorspace by 2036 under the ‘Baseline’ scenario, increasing to 6,397 sqm net for the ‘Higher Growth’ scenario. For comparison goods the capacity ranges from 13,923 sqm net to 15,002 sqm net.

10.91 In summary, the forecasts for Ebbsfleet confirm in very simple terms that the retail expenditure generated by the new resident population in Zone 7 alone would be able sustain the scale of floorspace currently allocated and planned for Ebbsfleet Central and Eastern Quarry.

10.92 For Dartford Town Centre (Zone 1) the retail expenditure generated by the forecast growth in population up to 2036 could theoretically support new convenience and comparison goods floorspace. However, based on current and predicted market trends, the most likely scenario is that the forecast growth in retail expenditure will principally support and underpin the viability of the town’s existing retail floorspace over time, without any need for a significant increase in the quantum of retail floorspace.

10.93 Notwithstanding this, there could be sufficient expenditure growth to support a new foodstore and/or a mix of smaller convenience stores. This would address the identified qualitative ‘gap’ in the town centre’s grocery and convenience store offer, as highlighted in Section 5.

10.94 Finally it must be stressed that these economic capacity forecasts are highly theoretical and are subject to wider economic and market trends, as well as the level of market interest and demand from occupiers for representation in the Borough’s main centres. As described in Section 2, the PPG accepts that the uncertainty in forecasting long-term retail trends and consumer behaviour means that forecasts “*may need to focus on a limited period (such as the next five years)*”, although they do also need to take the lifetime of the plan into account and be regularly reviewed⁷⁴.

⁷⁴ PPG. Paragraph: 004 Reference ID: 2b-004-20190722

10.95 It is in this context that these capacity forecasts should be considered and applied, with caution, by the local planning authority, and monitored and updated at regular periods.

11. LEISURE NEEDS ASSESSMENT

- 11.1 Having assessed the capacity for new retail floorspace, this section focuses on the potential need for new leisure uses and facilities in the Borough over the plan period. This assessment necessarily focuses on the following main leisure, entertainment and cultural uses identified by the NPPF (Annex 2). These uses are widely accepted as making a significant contribution to the overall vitality and viability of town centres, and should be located in town centres first in accordance with national and local plan policy objectives.
- 11.2 As described in Section 4, the Government issued its reforms to the Use Classes Order in July 2020 at the time of finalising this study, and these came into effect on 1st September 2020. The table below summarises the impact of these reforms on the classification of the main food and beverage, commercial leisure and cultural uses.

Table 11.1: Reform of Use Classes Order

Original Use Class ⁽¹⁾ :	Revised Use Class ⁽²⁾ :	Use:	Description:
Class A3	Class E	Restaurants and cafés:	Defined as selling food and drink for consumption on the premises.
Class A4	Class E	Drinking establishments:	Includes public houses, wine bars or other drinking establishments (but not night clubs), and drinking establishments with expanded food provision
Class A5	Sui Generis	Hot food takeaways:	Defined as the sale of hot food for consumption off the premises.
Class D1	Class F.1	Non-residential institutions:	Includes art galleries (other than for sale or hire) and museums.
Class D2	Sui Generis	Leisure/Recreation (indoor/outdoor)	Cinemas, music and concert halls, bingo and dance halls
Class D2	Class E		gymnasiums or area for indoor recreations.
Class D2	Class F.2		Indoor or outdoor swimming baths, skating rinks and outdoor sports/recreations.
Sui Generis	Sui Generis	A use on its own	Theatres, nightclubs, casinos

Source: ⁽¹⁾ Town and Country Planning (Use Classes) Order 1987 (as amended); ⁽²⁾ Revised Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (SI 2020 No.757).

- 11.3 It is important to understand at the outset that forecasting the need for new leisure uses is more problematic than for retailing, as the sector is highly complex and dynamic. For example, the demand for existing and new leisure uses and facilities is particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently, the methods developed to forecast the need for new leisure uses are necessarily more flexible and high level. In this context LSH has developed robust and transparent approaches to assess the needs for new leisure uses based on the following key inter-related workstreams:
- A review of the key trends driving expenditure growth and market demand in the leisure sector over the last decade;
 - An audit of existing leisure provision in the Borough to help identify whether there are any significant 'gaps' in provision;
 - A review of current leisure participation rates and preferences across the study area based on the results of the household survey; and
 - For some leisure uses we have applied a robust economic need assessment based on accepted approaches.
- 11.4 Appendix A13 sets out the economic tables detailing the forecast growth in leisure expenditure. This section provides a summary of the key leisure trends, current provision and participation in the

Borough its main centres to help identify the potential (quantitative and qualitative) need for new uses and facilities over the plan period. As for the retail capacity assessment all leisure need forecasts should be treated with caution as they are subject to dynamic market and lifestyle trends, and changes in the market demand and investment preferences of leisure operators.

AVAILABLE LEISURE EXPENDITURE & FORECAST GROWTH

- 11.5 The leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the sector will not be immune to the impact of the recent economic impacts of the COVID19 pandemic and the recovery could lead to the loss of a number of established leisure operators (see below), the fact is that leisure and entertainment activities remain an important lifestyle and entertainment choice for many consumers over other areas of spending.
- 11.6 Against this background Tables 1-5 (Appendix A13) set out the forecasts of leisure expenditure growth across the Catchment Area and Zones based on the latest Experian-based expenditure figures and growth forecasts. These tables show:

Tables:	Description
1	Baseline population and projected growth for the period 2019 to 2036.
2	Baseline expenditure per capita figures for different leisure categories (expressed in 2017 prices), as derived from LSH's Experian-based MMG3 Geographic Information System (GIS).
3	Forecast year-on-year growth in leisure expenditure per capita based on the latest forecast by Experian set out in Retail Planner Briefing Note 17 (see Section 3).
4	Forecast growth in leisure expenditure per capita figures by category (Table 2 multiplied by Table 3).
5	Forecast growth in total available leisure expenditure by category up to 2036 (Table 1 multiplied by Table 4).

- 11.7 The total available leisure expenditure in the defined Study Area (Zones 1-11) is forecast to increase by some £235.4m (+83%) between 2019 and 2036, from £602.1m to £837.5m.

Table 11.2: Study Area - Total Forecast Growth in Available Leisure Expenditure by Category (£m)

	2019	2020	2025	2030	2035	2036	Growth (£m)	
							2019-30	2019-36
Accommodation Services	£37.8	£17.8	£40.0	£46.8	£52.3	£53.5	£9.0	£15.7
Cultural Services	£100.2	£47.1	£105.0	£121.8	£135.3	£138.1	£21.6	£37.8
Games of Chance	£57.5	£26.9	£59.5	£68.4	£75.4	£76.8	£10.9	£19.3
Personal Grooming	£31.4	£14.7	£32.9	£38.2	£42.5	£43.4	£6.9	£12.0
Recreation & Sporting Events	£46.4	£21.8	£48.8	£56.9	£63.4	£64.7	£10.5	£18.3
Food & Beverage	£328.8	£154.7	£347.1	£404.8	£451.5	£461.1	£76.1	£132.4
STUDY AREA - TOTAL:	£602.1	£283.1	£633.3	£737.0	£820.3	£837.5	£135.0	£235.4

Source: Appendix 9. Tables 1-5.

- 11.8 The food and beverage ('F&B') sector accounts for over half (circa 55%) of total available leisure spend, followed by 'cultural services' (17%), 'recreation services and sporting events' (8%), accommodation services (6%), 'games of chance' (10%) and 'personal grooming' (5%).
- 11.9 Table 5 (Appendix A13) shows that some 44% (£264.1m) of leisure expenditure is currently generated by households in the Dartford Borough area in 2019. Within the Borough there is some £191m of leisure expenditure available in Dartford West, which covers Dartford Town Centre (Zones 1-5); and £73.3m in Dartford East, which includes Ebbsfleet and Bluewater.

11.10 The Experian forecasts also show the anticipated impacts of the COVID-19 pandemic on leisure spend in 2020; with total spend forecast to fall by -53% (£319m), from £602.1m to £283.1m. Total leisure spend is not forecast to return to pre-COVID levels until 2025.

11.11 Over the forecast period (between 2019 and 2036), Table 5 (Appendix A13) shows total available leisure spend is projected to increase by £42.1m (+22%) in Dartford West to £232.8m, and by £98m (+134%) in Dartford East to £171.3m. The strong growth in Dartford East, and specifically Zone 7 (+£85.4m), reflects the impact of new residential development and population growth in Ebbsfleet.

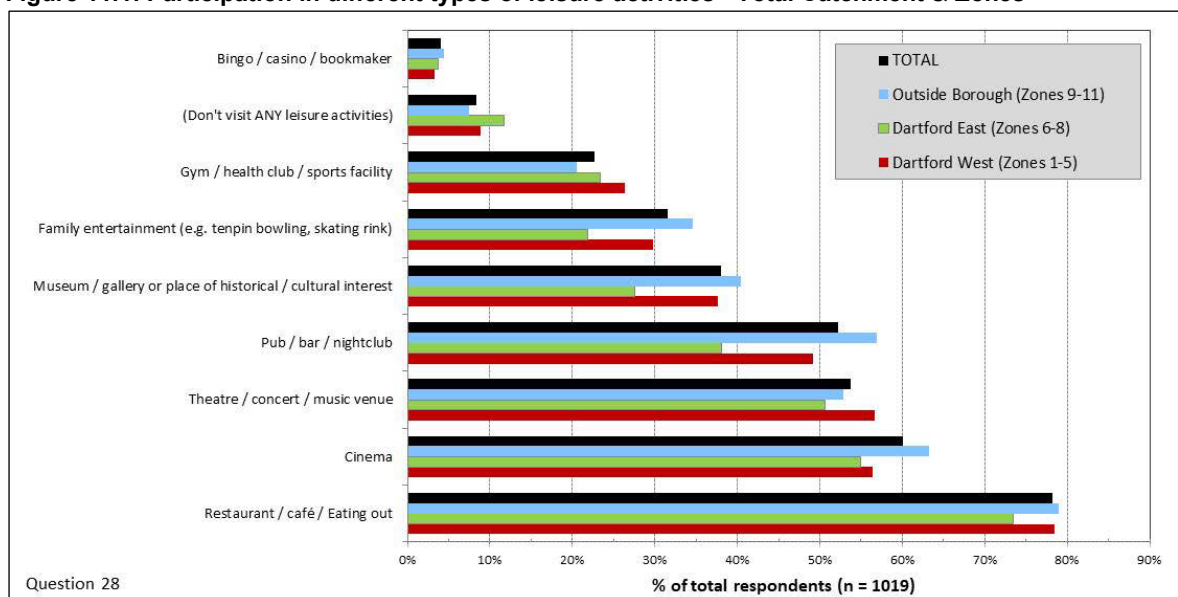
11.12 F&B spend accounts for the bulk of the forecast growth in leisure spend between 2019 and 2036. According to Experian’s latest figures, spend in this category is forecast to increase by +£23.6m in Dartford West between and by +£57.1m in Dartford East.

11.13 In summary, the broad leisure expenditure profile and forecasts show that the majority of the growth in expenditure will be weighted towards the food and beverage sector. Ebbsfleet (Zone 7) is also forecast to experience the highest increase in available leisure expenditure due to the impact of major new residential development and population growth.

LEISURE PARTICIPATION LEVELS

11.14 The expenditure profile is broadly reflected by the participation rates in different types of leisure activities by respondents to the household survey (question 28).

Figure 11.1: Participation in different types of leisure activities - Total Catchment & Zones



Source: Household Telephone Interview Survey (2020). Appendix B: Question 28.

11.15 The headline results show:

- **Restaurants, cafés and eating out generally:** is the most popular leisure activity carried out by some 78% of respondents across the overall Study Area.
- **Cinemas:** 60% on average across the study area go to the cinema. Cinema visits are slightly lower for those living in Dartford West (56%) and Dartford East (55%) than outside the Borough area (63.3%).
- **Theatres, concerts and music venues:** the third most popular activity for 54% of respondents to the household survey. The highest participation is in Dartford West of 57%; which reflects the relative attraction and draw of the Orchard Theatre in Dartford Town Centre (see below).

- **Pubs, bars and clubs:** over half (52.2%) of respondents carry out this activity, ranging from a low of 38.1% in Dartford East to 56.9% for those living outside the Borough.
- **Cultural Activities:** visiting museums, galleries and historic/cultural attractions was popular with 38% of all respondents and was the fourth most popular leisure activity.
- **Family entertainment activities:** some 32% of all respondents visit family entertainment facilities (e.g. tenpin bowling, skating/ice rinks, etc.). This ranged from a low of 21.9% in Dartford East, to 34.6% of respondents living outside the Borough.
- **Gyms and health/fitness facilities:** The average participation rate for all respondents is 23%; ranging from 20.5% outside the Borough to 26% in Dartford West.
- **Bingo:** This was the least popular activity of all those recorded; 4% across the catchment.

11.16 A further 8.4% of respondents indicated that they do not carry out any leisure activities; ranging from 8.9% in Dartford West to 11.7% in Dartford East.

11.17 Based on these stated participation levels the following provides a broad assessment of the potential Borough-wide need and market demand for new leisure uses in the context of current and predicted market trends, and the anticipated impact of COVID-19 on leisure activity over the short to medium term.

CINEMAS

11.18 The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of operators. Today the sector offer ranges from larger multiplexes⁷⁵, to smaller independent operators and 'pop up' screens town centres and mixed-use venues. The table below sets out some of the main cinema operators in the UK.

Table 11.3: Main cinema operators in the UK

Operator/ Brand:	No. of Cinemas	Description:
Cineworld	116	Established in 1995. The first cinema opened in Stevenage in 1996. Acquired the Picturehouse Cinema chain in 2014 (see below). Cineworld is the leading cinema operator in the UK (based on revenue).
Odeon/UCI	120	Established in 1930s. In July 2016, Terra Firma sold Odeon/UCI to the Chinese-owned AMC Entertainment group for £921m.
Vue	93	Established in 2003, following the acquisition of Warner Village for £250m. It has since grown through new development and acquisitions (e.g. acquired 7 Star Century cinemas in 2005 and 15 Apollo cinemas in 2012). In June 2013, the business was sold to Canadian investment firm OMERS Private Equity and Alberta Investment Management for £935m.
Showcase	19	Established in 1986. Owned by National Amusements Inc
Empire	14	Established in 2005, but has its origins in the Empire on Leicester Square which opened in 1884. Formed following the purchase of 11 former UCI and Odeon cinemas for c.£50m that had to be divested by Terra Firma (see above). Cineworld acquired 5 cinemas from Empire in 2016 for £94m, including the flagship cinema in Leicester Square.
Picturehouse	25	Established in Oxford in 1989. Differentiated by its unique locations, homely atmosphere, art-house film choices and quirky features like lounge bars and rare snack options. Cineworld acquired the entire chain for £47.3m in December 2012. A new cinema is scheduled to open in Ealing in 2021.
Reel	10+	Established in 2001, following the purchase of Curzon in Loughborough. Independently owned and branded as Reel Cinemas in 2005. Following their acquisition of Apollo cinemas, Vue sold four cinema to Reel (Fareham, Port Talbot, Burnley and Morecombe).
Everyman	35	Established in 2000. Acquired the Screen Cinemas chain in 2008 and 4 cinemas from Odeon in 2015. Increased its revenue by 27% in 2018 and opened 7 cinemas in 2019.
The Light	9	Established in 2007. Multiplexes in Wisbech, Cambridge, Walsall, Bolton, Sheffield, Stockport, Bradford and Addlestone. Trialled its first 3-screen cinema in Thetford, Norfolk - opened in 2016.
Movie House	3	Established in 1990. Based in Northern Ireland and acquired the UGC (ex MGM/Virgin) multiplex in Belfast City Centre. Also owns two other multiplexes in Northern Ireland.

Source: Various

⁷⁵ In general a multiplex is considered to be any cinema with five screens or more, though some of the largest multiplex sites have as many as 12 or 16 screens

11.19 Notwithstanding the greater variety and choice in the cinema sector, the three largest cinema operators still account for around 70% of total UK screens, and the six largest operators are collectively responsible for about 85% of the sector. Recent research⁷⁶ shows the significant growth in the cinema sector over the last 10-15 years, as well as the significant impact of COVID-19 on cinema attendances and revenue:

- Total admissions in 2019 stood at 176.1 million. Although this was slightly down on 2018 (177m), it was the second highest recorded admissions since 1970 (193m).
- Admissions in 2020 fell to 44m due to the impact of the COVID-19 pandemic; the lowest level since records began (dating back to 1935).
- UK box office receipts consistently reached their highest recorded levels in 2017 (£1.278bn), 2018 (£1.277bn) and 2019 (£1.251bn), but fell to £297m in 2020.
- The number of cinemas has increased from 697 in 2006, to 801 in 2017 and 840 in 2019.
- The number of cinema screens has increased from 3,741 in 2010, to 4,150 in 2015, 4,264 in 2017 and 4,564 in 2019.
- Approximately three-quarters (78.2%) of the screens are in multiplexes.
- The average population per screen in 2019 was estimated to be 14,529.
- Average annual spending per head on cinema trips has increased steadily from £12.93/head in 2005 to £18.72/head in 2019, before falling to £4.37/head in 2020.

11.20 Although year-on-year admissions and box-office takings are notoriously volatile — driven as they are by the appeal of individual films and principally Hollywood ‘blockbusters’ — the long-term trend since the mid-1980s has been upward, and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10-20 years is even more impressive when one considers that this has occurred against the increase in new and sophisticated in-home entertainment, driven by new technology, choice and flexibility (including, for example, Sky, Netflix and Amazon, and in 2020 the launch of Apple and Disney platforms).

11.21 As the competition in the sector has increased, cinema operators have responded by introducing changes to the cinema experience. This has included new innovations in technology, improvements to the auditoriums and a higher food and beverage offer. For example, Cineworld has installed ‘DBOX’ seats in selected cinemas, which ‘react’ to the film and provide a more immersive experience. Vue has also rolled out their innovative ‘*Evolution*’ concept in some cinemas, with luxury seating, beanbags and settees. Odeon has introduced their luxury ‘*Luxe*’ branding into a number of converted and new cinemas, beginning with East Kilbride in 2017, which has evolved into the opening in 2019 of its premium ‘*Luxe & Dine*’ concept in Islington, north London, which is specifically aimed at adults. Showcase also introduced their ‘*Cinema De Lux*’ branded multiplexes in 2014, beginning with the conversion of its cinema in Bluewater. This subsidiary brand puts emphasis on customer service, lush décor, high quality food and other high-end amenities. Some 13 other Showcase multiplexes have since upgraded to the Cinema de Lux brand.

11.22 There has also been a growth in smaller (Digital) cinemas serving smaller catchment areas. These Digital cinemas are more flexible and less “*space-hungry*”, as they do not require the large auditoriums needed to accommodate traditional projectors. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings, or as part of a mixed use offering. Other trends in the sector include the growth of ‘pop-up’ cinemas. Although there appears to be no reliable or recent data on the UK ‘pop-up’ cinema market, it is estimated that there were some 800-1,000 screenings in 2018, with 650+ screenings in London alone. Analysts estimate that the sector

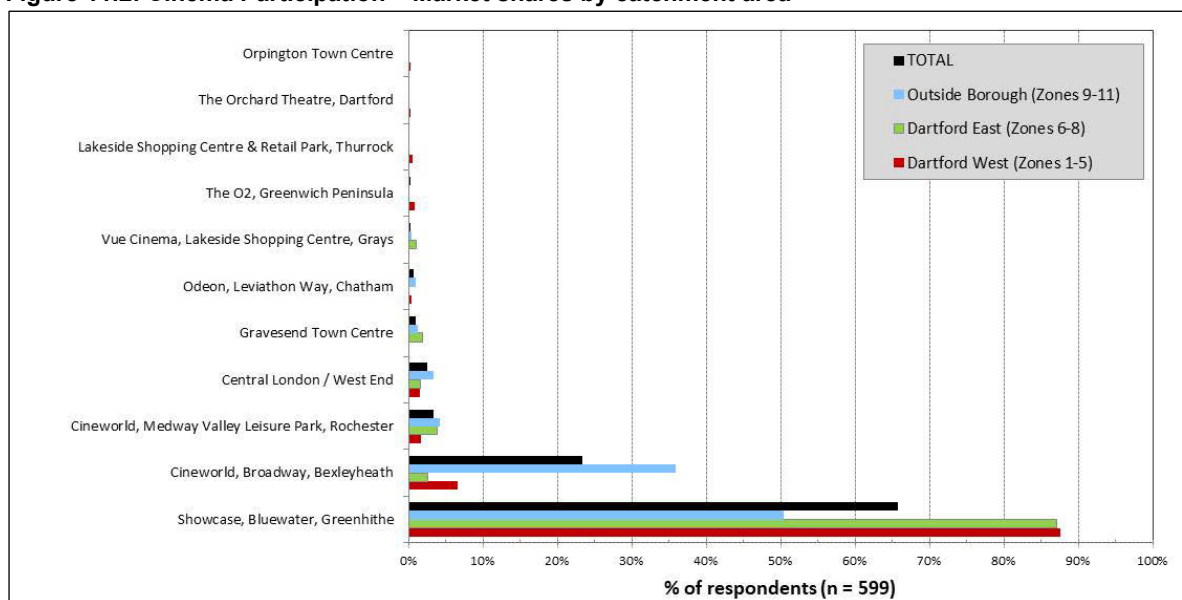
⁷⁶ Dodona Research; The Big Picture; BFI

has a market value of circa £10m and has the potential to grow at between 20-25% per annum. Luna Cinema is the market leader and is reported to have achieved a turnover of around £3m in 2019 from around 175-200 screenings per year. Other niche operators in this space include Rooftop Film Club London, Backyard Cinema, Secret Cinema, Pop-up Screens and The Nomad Cinema.

11.23 Although the impact of the COVID-19 pandemic has had a significant impact on cinema attendances and sales in 2020, potentially leading to a period of restructuring and consolidation across the industry, we nevertheless consider that cinema attendances will begin to recover over the medium term as major new films are released. In our judgement cinema trips will remain a significant and popular leisure activity for all age groups. Notwithstanding this, the competition from home entertainment and alternative film channels (like Netflix, Amazon, Apple and Disney) will intensify and cinema operators will have to keep updating and adapting their offer to respond to consumer needs.

11.24 In terms of the responses to the household survey (question 28) some three out of five (60%) of households in the Catchment Area stated that they regularly visit a cinema. This was the second most popular leisure activity after eating out (78%).

Figure 11.2: Cinema Participation – Market shares by catchment area



Source: Household Survey. Appendix B: Question 30. (weighted base = 599 respondents).

11.25 As the figure shows the only cinema in Dartford Borough is the 17-screen Showcase Cinema de Lux in Bluewater Shopping Centre, which is attracting some 87% of all cinema trips made by households in the Borough and almost two-thirds (65.7%) of all trips across the total catchment area. In addition to Showcase, the Cineworld in Bexleyheath is also popular attracting 23.4% of all trips from respondents in the wider catchment, but this falls to 6.6% in Dartford West and 2.6% in Dartford East. Other popular cinemas include the Cineworld at Medway Valley Leisure Park in Rochester, although it is only achieving a 3.4% share of all trips across the wider catchment.

11.26 A standard and widely accepted approach for assessing the potential quantitative need for new cinemas is based on national and regional ‘screen density’ averages (i.e. the number of screens per 100,000 population). According to the latest available research⁷⁷, the current UK average is 6.6 screens per 100,000 people, which represents an increase from 6.1 screens in 2014. The equivalent figure for the South East region is 7.4 screens per 100,000 people. This compares with a screen

⁷⁷ Dodona Research, Office for National Statistics (ONS) and BFI

density of 7.3 for London, 6.1 for the West Midlands and 5.3 for the North East. Using this approach the table below shows there is no additional theoretical capacity to sustain new cinema screens over the forecast period.

Table 11.4: Indicative Capacity for New Cinema Screens in Dartford Borough area

	2019	2020	2025	2030	2035	2036
Dartford Borough Area Population:	109,700	112,042	123,753	133,165	142,541	144,408
Screen density per 100,000 people:	7.4	7.4	7.4	7.4	7.4	7.4
Screen potential:	8.1	8.3	9.2	9.9	10.5	10.7
Existing screens:	17	17	17	17	17	17
INDICATIVE SCREEN CAPACITY:	-9	-9	-8	-7	-6	-6

Note: The Showcase in Bluewater has 17 screens. The average screen density is for the South East region.

11.27 However, the issue with this approach in this case is that the capacity forecasts are significantly impacted by the 17-screen Showcase Cinema de Lux in Bluewater and also take no account of market demand from other cinema operators who may want to take space in the Borough and specifically in Dartford Town Centre. Given the wider regional draw of Bluewater's retail and leisure offer, we consider it is reasonable in this case to re-run the capacity forecasts without the Bluewater cinema for Dartford's primary catchment area (i.e. Zones 1-5). The revised capacity forecasts are set out below.

Table 11.5: Revised Cinema Screens Capacity (excluding Bluewater's Cinema).

	2019	2020	2025	2030	2035	2036
Dartford Town Centre Catchment (Zones 1-5):	80,849	81,606	85,392	87,718	90,037	90,499
Screen density per 100,000 people:	7.4	7.4	7.4	7.4	7.4	7.4
Screen potential:	6.0	6.0	6.3	6.5	6.7	6.7
Existing screens:	0	0	0	0	0	0
INDICATIVE SCREEN CAPACITY:	6	6	6	6	7	7

11.28 As the revised forecasts show, there could be capacity for up to 6 additional cinema screens in Dartford's primary catchment area. This supports the proposals for the Westgate scheme, which includes a cinema as a key anchor. Further to this 'pop-up' cinemas, such as in Central Park during the Summer and/or around major sporting/cultural events, will help to complement and strengthen the town's offer. Other new trends in the industry, particularly around the growth in digital entertainment, should also be explored and encouraged in the town centre as and when the opportunities arise.

EATING AND DRINKING OUT

11.29 The food and beverage (F&B) sector comprises restaurants, cafés, bars and pubs. These uses are an integral part of a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times' (i.e. the time people spend in centres), increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

11.30 The COVID-19 has had a massive impact on this sector. Although Government support, including business rate relief and the 'Eat Out to Help Out'⁷⁸, helped to mitigate some of the impacts,

⁷⁸ The initiative provided a 50% discount at participating cafés and restaurants on Mondays to Wednesdays during August, with discounts capped at £10. The scheme ended on 31st August.

at the time of writing COVID-19 had accelerated many of the trends and structural changes affecting the F&B sector over recent years. The table below summarises of some of these key trends.

Table 11.6: Key trends in the food and beverage sector

Use:	Headline Market Trends:
Restaurants	This sector has experienced mixed fortunes over recent years, pre COVID-19. Some of the key trends driving change included an increase in ' <i>eating at home</i> '. Restaurants are increasingly entering the home delivery market using online third-party delivery companies (such as Just Eat, Deliveroo and Uber Eats). Customers are increasingly basing their decisions to eat out on ' <i>value for money</i> ', but not at the expense of quality in terms of service, food and the overall experience. COVID-19 and "social distancing" has accelerated this trend, with more households now eating from home.
Pubs and Wine Bars	Pub operators have widened their food and non-alcoholic beverage offer the last decade, resulting in the growth of so-called " <i>gastro-pubs</i> " and, most recently, the rise in 'micro pubs'. Notwithstanding this trend, the sector has also been characterised by increasing consolidation and closures. This is mainly explained by high occupancy costs (e.g. business rates) and beer duty, and changes in consumer demand and drinking habits. As a consequence there has been a significant increase in the conversion and/or redevelopment of pubs to alternative uses over the last decade; including for residential uses and/or convenience retailing. Recent research by CAMRA indicates that some 854 pubs closed in 2018 and there were approximately 41,500 pubs open in early 2019. On a positive note the number of closures slowed from 980 in 2017, which most likely reflected the impact of new planning policies and the recognition of pubs as ' <i>Assets of Community Value</i> ' (ACV). Nevertheless, the figures for 2018 still represented more than 14 closures per week. Figures from the ONS show that the number of small pubs in the UK (defined as having under 10 employees) has almost halved since the turn of the century; from 38,830 in 2001 to 22,840 in 2018. The latest figures show a slight (+0.4%) increase to 22,925 in 2019, which also probably reflects the impact of policy changes and also the rise of 'micro pubs'.
Cafés and Coffee Shops	This sector has experienced strong growth over the last decade. Latest figures show that the UK coffee shop market comprises some 25,500 outlets and is valued at £10.1bn ⁷⁹ . Costa Coffee, Starbucks and Caffè Nero are the three largest chains in the UK, with 2,655 outlets and a total market share of 53%. The UK branded coffee shop market is estimated to exceed 10,000 outlets by 2023, equivalent to a 5-year compound annual growth rate of 5%. Notwithstanding the rise of the multiples, this sector has also been characterised by growth in independent and specialist cafés and coffee houses; particularly those serving a more luxury or specialist offer (e.g. organic, in-house roasted beans, and Fairtrade). In the specialty segment, artisan concepts continue to grow (such as 'Department of Coffee' and 'Social Affairs'). Others include London-based 'Grind' and 'Caravan'. The strong independent coffee sector has also fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated, the continued growth of this sector is one of the most successful in the UK economy

11.31 The F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend is also forecast to experience the greatest volume growth up to 2036. In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of F&B uses across the Borough and in its main existing and planned centres.

11.32 In reality though, this growth will be determined by wider current and future trends in the sector, the impact of COVID-19 and "social distancing", and operator demand for space in the Borough and its main centres. For example, the growth in the availability, convenience and speed of home deliveries driven by new technology and 'apps' represents a significant challenge to more traditional F&B operators. Research carried out before COVID-19 predicted that the food delivery market in 2020 would have a value of almost £5bn, which represents a growth of +17% since 2018. The impact of COVID-19 and "social distancing" has accelerated the trend for household's "eating out at home".

11.33 These current and new challenges have resulted in a radical restructuring of businesses across the sector, resulting in the closure of many loss-making branches pre COVID-19. It is estimated that some 1,412 UK restaurants closed in the year to the end of June 2019⁸⁰. This represented a +25% increase on the previous year and was the highest number of insolvencies recorded since 2014, when approximately 750 restaurants closed. Both the larger multiples and smaller independent

⁷⁹ Source: Allegra World Coffee 2019 (Project Café UK 2019)

⁸⁰ Research by UHY Hacker Young. Reported in The Guardian <https://www.theguardian.com/business/2019/sep/16/more-than-1400-uk-restaurants-close-as-casual-dining-crunch-bites>

restaurant operators have been affected. The table below shows some of the higher profile “casualties” over the last two years and the impact of COVID-19:

Table 11.7: The “casual dining” sector – recent trends and business “casualties”

Operator/Brand:	Headline Market Trends:
Strada	The Italian restaurant chain has just three restaurants now operating in London after closing most of its restaurants across the UK since 2017.
Jamie's Italian	Jamie Oliver's Restaurant Group which was established in 2008 went into administration in May 2019. It closed 22 out of its 25 restaurants, with the loss of over 1,000 jobs.
Byron Burger	The burger chain closed 19 outlets in 2018 under a Company Voluntary Agreement (CVA) to address escalating debts. Following administration the brand and certain assets have been sold to newly-formed company Calveton.
Prezzo	Closed over 100 outlets in 2018, equivalent to approximately one-third of the chain's restaurant portfolio, which includes Prezzo, Mexico and Cleaver brands and all 33 Chimichanga restaurants.
Carluccio's	Following a series of closures since 2018 the Italian chain collapsed in March 2020 and 30 restaurants were later brought out of administration by the Boparan Restaurant Group. However, since then 40 other restaurants have closed with the loss of over 1,000 jobs.
The Restaurant Group	The Group owns a number of different brands (including Wagamama, Chiquito, Garfunkels and Frankie & Benny's). It launched a CVA in 2020 - seeking to close 125 sites across the UK, with the potential loss of 3,000 jobs, and to negotiate lower rents for the remaining c.160 sites.
Pizza Express	Operates some 450 outlets in the UK and Ireland but had a reported debt of over £1bn in 2019. Announced proposals to close around 67 of its sites in August 2020, putting some 1,100 jobs at risk.
Gourmet Burger Kitchen (GBK)	GBK entered into a CVA in November 2018, which resulted in the closure of 24 restaurants, with the loss of c.250 jobs. The owners put the remaining 62 outlets on the market in September 2020.

Source: Various

11.34 It is likely that there will be an increase in business failures and closures of restaurants, bars and cafés during 2021 as the impact of COVID-19 on sales and profit margins deepens. Experts predict that this further “shakeout” in the sector will leave the proactively managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer as the main “winners”. This is illustrated by a number of recent success stories that provide hope for the sector, including Nando's the South African restaurant chain and Gail's Artisan Bakery.

11.35 Pubs and takeaway outlets should also continue to outperform restaurants as they are better positioned to satisfy the demand for lower-cost, convenient meals. For example, McDonalds reported a +5.9% year-on-year growth in global sales in 2019 and opened 40 new sites in the UK in 2019. It is committed to investing £1bn in UK over the next three years, with focus on new openings, refurbishments and improving the “digital experience” for customers. This includes trialling a new “grab-and-go” format with no seating and smaller self-order screens on London's Fleet Street.

11.36 F&B operators, like retailers, will also need to understand and cater for the needs of the changing demographic and consumer market to remain relevant and viable. For example, Section 3 identified that Millennials (under 35s) make-up almost one-quarter of the UK population and research shows that they spend a significant 13% of their disposable incomes on eating and drinking out⁸¹. Looking ahead, by 2025 it is estimated that Millennials will make up over 80% of all parents in the UK, meaning that restaurants, pubs and cafés will also need to evolve and adapt to cater for the changing needs of new ‘Millennial families’. This could be driven for example, by increasing emphasis on convenience, affordability, entertainment, uniqueness and the use of technology and apps. Restaurant operators will therefore, as a minimum, need to make sure that they are easy to reach online and on social media with up-to-date menus and strong images, and adapt the latest technologies to drive online booking. It will also mean sourcing more organic, vegetarian/vegan and local sustainably sourced produce that respond to customers' changing tastes and concerns with regard to climate change. For example, figures provided by the Vegan Society indicate that there

⁸¹ Reported in: <https://www.verdictfoodservice.com/features/what-do-millennials-want-in-a-restaurant/>

are approximately 1.7m vegetarians in GB and over 900,000 vegans. Forecasts indicate that vegans and vegetarians could make up a quarter of the British population in 2025⁸². This trend has impacted on the business models and menus of a number of the leading national restaurant and takeaway operators. For example, 'Pret A Manger' has some 400 outlets in the UK and acquired 110 outlets operated by its rival Eat in 2019. Pret plans to rebrand some of the acquired sites as 'Veggie Pret' to tap into this growth, and the first outlet opened in 2016 in Soho, London, after a month-long 'pop-up' trial.

11.37 There is also the potential for restaurants and pubs to tap into the growth in home deliveries, with the potential to reach new audiences and increase turnover at quieter times; a trend that has been accelerated by the COVID-19 pandemic. However operators will also face the challenge that commissions payable to these platforms are typically in the range of 20-25% of the total order value, with the loss of drink sales also associated with delivered food.

11.38 In this context it is no coincidence that the popularity of street food, market halls and "meanwhile"/"pop-up" restaurants and bars has also coincided with the growth in the spending power and influence of the Millennials. These more informal drinking and eating venues fulfil their desire to experiment and explore different styles of drink, food and new cuisines in exciting new and more informal environments. Trialling a "pop-up" site also represents an opportunity to test a new concept, gain a following, fine-tune details and secure investment before making a long-term commitment. The pop-up concept is also attractive to landlords and property companies who are increasingly nervous about signing long leases following numerous high profile restaurant closures. Examples include the Spanish 'small-plates' restaurant, Pilgrim, which started out with a six-month residency in Hackney before gaining the backing of Graffiti Spirits Group and opening their first permanent restaurant at the group's Duke Street Market which was then under redevelopment in Liverpool. They have since tested the concept further with pop-ups in London and Liverpool allowing them to refine their menus and build an audience.

11.39 Turning to the food and beverage provision in Dartford, the table below summarises the current provision in the Town Centre benchmarked against the GOAD national average for all circa 2,500 shopping locations audited by Experian.

Table 11.8: Dartford Town Centre - Food & Beverage Provision

	OUTLETS			FLOORSPACE		
	Number	% of Total Outlets in Centre	UK Average	sqm	% of Total Floorspace in Centre	UK Average
Bars & Wine Bars	2	0.6%	1.9%	158	0.2%	2.2%
Cafés	14	4.0%	4.8%	1,041	1.2%	2.7%
Fast Food & Take-aways	15	4.2%	5.8%	1,858	2.2%	2.9%
Public Houses	7	2.0%	2.6%	1,802	2.1%	3.5%
Restaurants	16	4.5%	4.7%	2,954	3.4%	4.2%
FOOD & BEVERAGE - TOTAL:	54	15.3%	19.8%	7,813	9.1%	15.5%
DARTFORD TOWN CENTRE TOTAL:	354	100%	100%	85,796	100%	100%

Source: Experian Goad Category Report - 2018/19

Notes: The floorspace figures are derived from Experian Goad Plans and these only show the footprint floorspace and the site area without the building lines. They should not therefore be read as a definitive report of floorspace, but do nevertheless provide useful means of comparison between centres. Figures may not sum due to rounding.

⁸² 'Future of Food Report', Sainsbury's.

11.40 The figures show that Dartford has some 54 Class A3-A5 businesses trading from a total floorspace of 13,192 sqm. There is currently an under-provision of outlets (16%) and floorspace (9.1%) in the Town Centre benchmarked against the national average figures of 19.8% and 15.5% respectively. The average size of F&B outlets in Dartford of 145 sqm (1,557 sqft) is also below national averages and reflects the fact that the town has a relative under-provision of major national restaurants and cafés. Measured by the number of outlets only, the Town Centre also has an under-provision of places to eat and drink across all the Class A3-A5 uses; names cafés, fast food/takeaway outlets, public houses and bars/wine bars, and restaurants.

11.41 The results of the household and in-centre surveys provide a further layer of analysis to inform the robust assessment of current provision, potential ‘gaps’ in provision and future potential needs. As described above, eating out in cafés and restaurants is the most popular leisure activity across the defined catchment (study) area with participation levels of 78%. Table 11.7 below shows the main centres and locations where respondents stated that they normally go when eating out.

11.42 Bluewater is by far the most popular destination in the catchment area with a total market share of 29.3%, increasing to 41.5% in Dartford West and 47.8% in Dartford East. Bexleyheath Town Centre is the next most popular destination, but its market share in Dartford Borough is more limited. Dartford Town Centre is achieving a relatively good market share in its core catchment zone (i.e. Dartford West), but its penetration is more limited for households in Dartford East, mainly due to the draw of either Bluewater or Gravesend.

Table 11.9: Where do households go most regularly to eat out?

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Bluewater Shopping Centre	41.5%	47.8%	18.9%	29.3%
Bexleyheath Town Centre	2.4%	2.6%	28.8%	17.5%
Dartford Town Centre	31.9%	8.8%	7.5%	15.3%
Gravesend Town Centre	3.4%	10.1%	16.1%	11.4%
Central London / West End	6.2%	4.6%	8.2%	7.2%
Swanley Town Centre	0.4%	0.5%	3.9%	2.4%
Crayford Town Centre	2.0%	0.7%	3.1%	2.5%
Bexley Village Centre / Old Bexley	3.7%	0.7%	0.9%	1.8%
Meopham Village Centre	0.0%	2.7%	1.3%	1.1%
Farningham Village Centre	0.9%	0.0%	1.3%	1.0%
Maidstone Town Centre	0.0%	0.0%	1.3%	0.7%
Sidcup Town Centre	0.8%	0.9%	0.7%	0.7%
Longfield Village Centre	0.0%	6.3%	0.0%	0.7%
Bromley Town Centre	0.0%	0.0%	1.2%	0.7%
Lakeside Shopping Centre & Retail Park, Thurrock	0.2%	0.0%	1.0%	0.6%
Northumberland Heath, Bexley	0.0%	0.0%	1.1%	0.6%
Medway Valley Leisure Park, Rochester	1.1%	0.0%	0.4%	0.6%
Other:	5.6%	14.3%	4.4%	5.9%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey – question 35. (weighted base = 699 respondents).

11.43 In terms of where respondents normally go for a “social drink” outside the home and/or nightclubbing, the table below shows that Dartford Town Centre is the most popular destination in the wider catchment area with a market share of 19.5%; higher than for Bexleyheath (19.2%) and Gravesend (10.6%) Town Centres, and Central London (10.6%). Bluewater’s market share of 5.7% across the catchment reflects its more limited pub, bar and club offer.

Table 11.10: Where do households go our most regularly for a “social drink” or clubbing?

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Dartford Town Centre	47.3%	13.4%	6.7%	19.5%
Bexleyheath Town Centre	2.7%	4.8%	29.5%	19.2%
Gravesend Town Centre	1.0%	14.6%	14.8%	10.6%
Central London / West End	13.6%	4.8%	9.9%	10.6%
Bluewater Shopping Centre,	10.2%	10.1%	3.3%	5.7%
Bexley Village Centre / Old Bexley	7.6%	1.6%	4.8%	5.7%
Crayford Town Centre	0.8%	0.0%	5.1%	3.4%
Swanley Town Centre	0.3%	0.0%	4.0%	2.5%
Erith Town Centre	0.0%	0.0%	3.6%	2.2%
Greenhithe Village Centre	3.6%	11.9%	0.0%	2.2%
Northfleet Town Centre	0.0%	1.2%	3.3%	2.1%
Bromley Town Centre	0.0%	0.0%	2.9%	1.7%
Longfield Village Centre	0.0%	17.7%	0.0%	1.6%
Welling Town Centre	0.0%	0.0%	2.1%	1.3%
Meopham Village Centre	0.0%	0.0%	1.7%	1.0%
Wilmington Village Centre	2.6%	0.0%	0.3%	1.0%
Sidcup Town Centre	0.0%	0.0%	1.5%	0.9%
Farningham Village Centre	0.7%	0.0%	0.7%	0.6%
Dartford West District Centre	1.9%	0.0%	0.0%	0.6%
Northumberland Heath, Bexley	0.0%	0.0%	0.9%	0.5%
Other	7.8%	20.0%	4.8%	7.1%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey – question 34. (weighted base = 456 respondents).

11.44 Dartford Town Centre is achieving a relatively strong market share in its core catchment zone (Dartford West) of 47.3%, compared with the Dartford East zone (13.4%). The main competition in Dartford West is Central London/West End (13.6%), Bluewater (10.2%) and Bexley Village (7.6%).

11.45 In summary, the survey results confirm that eating and drinking out are popular leisure activities for most households in the wider Catchment Area and Dartford Borough. Although “*satisfaction levels*” with current provision are relatively good, there nevertheless does appear to be potential to increase Dartford Town Centre’s market penetration within its core catchment zone (Dartford West) through improvements to the range and quality of its food and beverage offer, dependent on market demand. This will be achieved, in part, over the short term through the plans for new food and beverage outlets as part of the Hythe Street (Westgate Dartford) scheme, if delivered, and other mixed use developments across the town centre (e.g. Lowfield Street).

11.46 The potential need for new F&B uses/floorspace over the short, medium and long term is further supported by the forecast growth in population and expenditure in this leisure sector. Appendix A14 sets out the detailed forecasts of expenditure growth for the 11 study area zones based on the latest Experian figures and forecasts. The table below summarises the growth in available F&B spend for total catchment area and three geographic areas.

Table 11.11: Food & Beverage: Total available spend and forecast growth by catchment zone

		2019	2020	2025	2030	2035	2036	GROWTH (£m):	
								2019-30	2019-36
Zones 1-5	DARTFORD WEST (incl Dartford Town Centre)	£105.4	£49.2	£106.1	£118.5	£127.2	£129.0	£13.1	£23.6
Zones 6-8	DARTFORD EAST (incl Bluewater / Ebbsfleet)	£40.3	£20.0	£55.5	£74.9	£93.5	£97.4	£34.7	£57.1
Zones 9-11	OUTSIDE BOROUGH	£183.1	£85.5	£185.5	£211.4	£230.8	£234.7	£28.3	£51.7
STUDY AREA TOTAL:		£328.8	£154.7	£347.1	£404.8	£451.5	£461.1	£76.1	£132.4

Source: Appendix A14

11.47 As the table shows, total available F&B expenditure in the catchment is forecast to increase by a substantial £132.4m (+40%) between 2019 and 2036; from £328.8m in 2020 to £461.1m. This total

available expenditure can be further broken down as follows based on Experian's figures and market share allocations for different types of F&B spend:

Table 11.12: Food & Beverage: Total available spend and forecast growth by category

	Market Share (%)	2019	2020	2025	2030	2035	2036	2020-30	2020-36
Restaurant and café meals	51%	£168.86	£173.50	£200.19	£227.00	£255.68	£261.65	£53.5	£88.2
Alcoholic drinks (away from home)	20%	£67.13	£68.98	£79.59	£90.24	£101.65	£104.02	£21.3	£35.0
Take away meals eaten at home	14%	£45.37	£46.62	£53.79	£60.99	£68.70	£70.31	£14.4	£23.7
Other take-away and snack food	14%	£44.51	£45.74	£52.77	£59.84	£67.40	£68.98	£14.1	£23.2
Contract catering (food)	1%	£2.89	£2.97	£3.43	£3.88	£4.37	£4.48	£0.9	£1.5
STUDY AREA - TOTAL:	100%	£328.8	£337.8	£389.8	£442.0	£497.8	£509.4	£104.2	£171.6

	Market Share (%)	2019	2020	2025	2030	2035	2036	2019-30	2019-36
Restaurant and café meals	51%	£168.86	£79.44	£178.25	£207.94	£231.90	£236.85	£39.1	£68.0
Alcoholic drinks (away from home)	20%	£67.13	£31.58	£70.87	£82.67	£92.19	£94.16	£15.5	£27.0
Take away meals eaten at home	14%	£45.37	£21.35	£47.90	£55.87	£62.31	£63.64	£10.5	£18.3
Other take-away and snack food	14%	£44.51	£20.94	£46.99	£54.81	£61.13	£62.44	£10.3	£17.9
Contract catering (food)	1%	£2.89	£1.36	£3.05	£3.56	£3.97	£4.05	£0.7	£1.2
STUDY AREA - TOTAL:	100%	£328.8	£154.7	£347.1	£404.8	£451.5	£461.1	£76.1	£132.4

11.48 The figures show that eating/drinking out in restaurants and cafés accounts for over half (51%) of total F&B expenditure. Drinking alcohol outside the home in pubs and bars accounts for one-fifth (20%) of spend. Other F&B expenditure is principally accounted for by takeaway meals eaten at home (14%) and takeaway/snack food (14%). The Experian-based forecasts show growth in spend on eating out of £76.1m (+49%) between 2019 and 2036, of which £39m is forecast growth in eating out in restaurants and cafés.

11.49 Clearly not all this spend growth will be available to support new F&B businesses, as a proportion will need to be absorbed by existing businesses to cover rising operational/occupancy costs and inflation⁸³. Notwithstanding this, it is clear that the growth within the Borough could sustain new cafés, restaurants and bars over the forecast period, subject to market demand and the ongoing impacts of the COVID-19 pandemic.

GYMS AND HEALTH & FITNESS FACILITIES

11.50 Research carried out before the impact of COVID-19 indicated that the UK health and fitness industry is stronger than it has ever been as measured by number of gyms, membership and market value⁸⁴. For the 12-month period up to the end of March 2019:

- The number of fitness facilities in the UK increased from 7,038 to 7,239.
- Total membership grew by +4.7% to 10.4 million.
- Total market value increased by +4.2% to £5.1 billion (up from £4.4bn in 2016).
- The UK market share increased to 15.6%, up from 13.7% in 2015; approximately one in every seven people in the UK has gym membership.

11.51 Gyms and health/fitness facilities make an important contribution to the health and well-being of the population across all age levels. The structure of the UK health and fitness industry has evolved significantly over the last decade to reflect changes in consumer choice and trends. The main operators in the health and fitness sector include:

⁸³ Like for retail capacity assessments, an allowance needs to be made for the increase in the turnover "efficiency" or floorspace "productivity" of existing F&B operators for them to remain profitable and viable in line with forecast increases in their underlying costs.

⁸⁴ *State of the UK Fitness Industry Report (2019)*. Leisure DB (formerly the Leisure Database Company). The research is compiled by independent leisure market analysts,

Table 11.13: Main gym operators in the UK

Operator/Brand:	UK Facilities	Position	
Pure Gym	250+	Budget	Established in 2009. Acquired all gyms from LA Fitness in 2015. Most locations are open 24 hours and offer cardio equipment, fixed/free weights and exercise classes. No fixed contract and memberships vary by location and club, but average from circa £14.99/month.
Anytime Fitness	166	Budget	24-hour health and fitness club. Membership rates vary by club.
The Gym Group	159	Budget	Established in 2007. 24-hour access. No fixed contract and membership starts from £10.99/month.
Snap Fitness	123	Mid-Market	Established in 2003. A privately owned and operated club.
DW Sports Fitness	120	Mid-Market	Established in 2009 when Dave Whelan purchased the 50 JJB Sports Fitness Clubs and the attached retail stores for £83m.
David Lloyd Leisure	112	Premium	Established in 1982. Provide a family orientated, high quality fitness and leisure facility. Whitbread PLC acquired the company in 1995 for £182m. It is now owned by TDR Capital who paid £750m for the business in 2013.
Nuffield Health	111	Mid-Market	Acquired 35 Virgin Active clubs in 2016 at a reported cost of £80m. Membership rates vary by club and locations, but start from circa £60/month.
Energie Group	100+	Mid-Market	Established in 2003. Clubs are typically between 5,000-25,000 sqft and comprise a café/ lounge area, fitness area, studio, locker rooms and showers. Many include spa areas, swimming pool, treatment rooms and spinning studios.
Bannatyne's	70	Premium	Established in 1997. Growth driven by new openings and acquisitions; including the purchase of the LivingWell Premier Health club chain from the Hilton Hotel UK Group in 2006. Also operates 37 spas and five hotels across the UK
Exercise4Less	50+	Budget	Gyms are mainly located in the Midlands and North. Gyms in South are in Hounslow, Harlow, Southend, Milton Keynes, Bath and Bristol. Offer a full boxing ring and combat classes. Membership starts from £9.99/month off-peak and £15.99/month peak.
Virgin Active	43	Premium	Established in 1999 as part of Virgin Group. Acquired the Holmes Place Chain in 2006 and Esporta in 2011. Subsequently sold 25 clubs to Nuffield Health in 2016 and 15 clubs to David Lloyd in 2017.
JD Gyms	30	Mid-Market	30 gyms were operating in Spring 2020. Nine others are scheduled to open in Blackburn, Chatham, Dundee, Glasgow, Newcastle-under-Lyme, Norwich, Oldham, Sheffield and Wakefield. No contract and membership starts from £19.99/month.
Sports Direct	21	Mid-Market	Gyms in Glasgow, Cheltenham, Fareham, Guildford, Lincoln, Liverpool, Manchester and Rugby. Memberships from £9.99/month.
Fitspace	20	Specialist / Boutique	A "boutique concept" which can operate in space ranging from 2,000-5,000 sqft. Includes gyms in Ascot, Battersea, Guildford, Epsom, Milton Keynes, Wantage and Woking.
Total Fitness	17	Mid-Market	Its 17 clubs are concentrated in northern England. Membership at any Total Fitness club allows access to any other Total Fitness club
Easygym	16	Budget	Plans to open 50 new gyms in London over the next 5 years. Their business model is based on franchise partners using the brand and operating sites. Membership fees vary by club and location, but start from £8.99/month outside London.
TruGym	12	Budget	Established in 2010 in Kent, where there are 4 gyms (Folkestone, Maidstone, Chatham and Bromley). It operates other gyms in Uxbridge, Luton, Peterborough and Boston, and its coverage extends to Stockton and Plymouth. No contract options. Membership starts from £14.99/mth
SimplyGym	11	Budget	Gyms in Bedford, Cheltenham, Coventry, Crewe, Kettering, Reading, Swindon, Walsall and Wrexham. Some gyms have spa areas, featuring saunas, steam rooms, aromatherapy and sun beds. No contract options and membership starts from £16.99/month.
Fitness4Less	9	Budget	Gyms in Bristol, Colchester, New Malden, Southwark, Worcester, Canning Town, Northampton, Watford and London Cambridge Heath. Gyms are fully staffed and include sauna/steam rooms. No contract options and memberships start from £15.99/month.
Gold's Gym	4	Specialist	Established in 1965 in Venice Beach, California. Specialist American-owned gyms that provide a variety of cardio and strength training equipment as well as group exercise programs. They operate gyms in Harrow, Dagenham, Hounslow and Hanwell.

Source: Various

11.52 The value and budget gym operators have experienced the most significant growth in the sector in recent years. According to figures by *Leisure DB* budget gyms now account for over one-third of gym memberships in the UK. The budget business model is normally based on 24-hour opening,

discounted monthly subscriptions (ranging from £9.99 up to £20), 'pay-as-you-go' rather than 'upfront' annual memberships, and gym-goers providing their own towels, toiletries and locker padlocks for the lockers. The popularity of the budget gyms is best reflected by the rapid expansion and success of Pure Gym since it was founded in 2007, along with relatively new entrants to this sector (such as Fitness4Less, Fitspace, TruGym, and SimplyGym). As a result the budget gym sector is becoming increasingly "crowded" and competitive, and operators are constantly striving for differentiation. Beyond further lowering membership prices, these operators are updating their training offer and technology to create better consumer experiences. For example, Energie launched a new group-based training concept called the YARD in 2017. This contrasts with Xercise4less, which has a timetable of over 30 classes more typically expected of a premium offer. Amid this differentiation in a crowded budget fitness sector, others will have to follow suit in order to keep pace, and attract new members. As a result we anticipate that there will be some restructuring and consolidation within the budget gym sector as the market evolves, particularly post COVID-19.

11.53 The growth of the budget gym operators has 'squeezed' the memberships and viability of some of the mid-market chains, such as LA Fitness and Fitness First. This has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap nor particularly exclusive will struggle to maintain market share in the competitive market place unless they revise their business models. At the same time, the middle-ground could be further squeezed by the current London-focused dynamic of boutique, class-based studios and more upmarket offers that could expand outside of London in the right locations. Furthermore, as operators compete against the "at-home fitness" revolution (e.g. Peloton), boutique studios and tech-enabled fitness, they will need to evolve to be more than "just gyms" in the post COVID-19 world. As with trends in the retail sector, experiences and entertainment will be key to attracting and retaining customers. For example, there has been continued investment into 'fitness-tainment' over the last few years and analysts predict that there is still plenty of opportunity for creativity and future growth.

11.54 The results of the household survey provide a further layer of analysis to inform the robust assessment of current participation levels in the Borough and the market share of existing facilities, as well as any potential 'gaps' in provision. As described above, the responses to question 28 show that some 22.7% of households across the total Catchment Area (Zones 1-11) visit the gym and/or health and fitness clubs. Participation levels range from a high of 26.3% in Dartford West, to 23.4% in Dartford East and 20.5% outside the Borough area. Going to the gym is ranked lowest of all the leisure activities, apart from gambling (i.e. trips to bingo and casinos).

Table 11.14: Gyms and sports/leisure facilities – market shares

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Fairfield Leisure Centre, Lowfield Street, Dartford	27.4%	10.0%	4.8%	13.5%
Dartford Town Centre	17.1%	0.0%	2.3%	7.3%
David Lloyd, Dartford, Darenth Road, Dartford	16.8%	6.3%	0.0%	6.8%
The Gym, Orchards Shopping Centre, Dartford	7.5%	0.0%	5.0%	5.3%
Gravesend Town Centre	1.0%	9.7%	7.0%	5.2%
Erith Town Centre	0.0%	0.0%	9.0%	4.6%
Crook Log Leisure Centre, Brampton Road, Bexleyheath	0.0%	0.0%	7.6%	4.0%
Birchwood Park Golf & Country Club, Wilmington, Dartford	7.7%	1.3%	1.0%	3.4%
White Oak Leisure Centre, Hilda May Avenue, Swanley	0.0%	0.0%	6.3%	3.3%
Anytime Fitness, Royal Oak Road, Bexleyheath	0.3%	2.4%	5.0%	3.0%
Tower Retail Park, Crayford	0.9%	0.0%	5.0%	2.9%
Central London / West End	2.7%	8.9%	1.0%	2.6%
Crayford Weights & Fitness, Tower Park Road, Crayford	0.0%	0.0%	5.0%	2.6%
Bexleyheath Town Centre	1.0%	0.0%	4.2%	2.6%
Snap Fitness, Eagle Way, Northfleet, Gravesend	0.8%	1.3%	4.0%	2.5%
Cygnets Leisure Centre, Old Perry Street, Northfleet	0.0%	1.1%	4.3%	2.4%
Cyclopark, The Tollgate, Watling Street, Gravesend	0.0%	2.0%	3.9%	2.3%
NRG Gyms, Garrick Street, Gravesend	0.2%	2.4%	3.4%	2.1%
Next Generation Clubs, Darenth Road, Dartford	0.0%	0.0%	4.0%	2.1%
Northfleet Town Centre	0.0%	4.7%	2.5%	1.9%
Reynolds Fitness, The Chapel, Chapel Walk, Bexley	4.3%	2.0%	0.0%	1.8%
Swanscombe Town Centre	0.8%	10.8%	0.0%	1.6%
Swanley Town Centre	0.6%	0.0%	2.6%	1.6%
Medway Valley Leisure Park, Whitewall Road, Rochester	0.0%	0.0%	2.7%	1.4%
Brands Hatch, Fawkham	1.9%	4.1%	0.0%	1.2%
Bexley Village Centre / Old Bexley	0.0%	0.0%	2.1%	1.1%
Swanscombe Leisure Centre, Craylands Lane, Swanscombe	0.0%	8.5%	0.0%	1.0%
Sidcup Town Centre	0.0%	0.0%	1.9%	1.0%
Longfield Village Centre	0.0%	6.7%	0.0%	0.8%
Living Well Health Club, Doubletree By Hilton, Dartford Bridge	1.0%	1.8%	0.0%	0.6%
Dartfordians Community Sports Club, Bourne Road, Bexley	1.6%	0.0%	0.0%	0.6%
Dartford East District Centre	1.5%	0.0%	0.0%	0.5%
Other:	4.9%	16.0%	5.5%	6.6%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey. Appendix B: Question 31. (weighted base = 226 respondents).

11.55 When asked which gyms and health/fitness facilities they normally visit (question 31), Table 11.13 shows that the Council-owned Fairfield Leisure Centre is the most popular across the total catchment (13.5%), and also in Dartford West (27.4%) and Dartford East (10%). This facility has benefited from a recent investment and refurbishment and provides a wide range of activities for Dartford's catchment population, including a swimming pool, gym, fitness classes, sports hall

11.56 Other gyms in Dartford Town Centre were also mentioned by a high proportion of respondents (17.1%). This include a number of independent fitness centres, classes and personal trainers located in and around the Town Centre (such as APC Fitness, Ronnie's Aerobics, etc.), along with Reflexions Muscle and Fitness Centre. The Gym, in The Orchards Shopping Centre, was also identified separately by some 7.5% of respondents in Dartford West as their main gym.

11.57 Notwithstanding Dartford Town Centre's relatively good market share of trips to the gym and health facilities, the survey results show that there could be potential to increase the choice and quality of the town centre's offer to help increase participation levels, "claw back" leakage to facilities in neighbouring facilities and improve health and well-being.

11.58 To further inform the potential for new gyms in the Borough we have applied our standard forecast model below which is based on applying average national gym membership levels to the projected growth in the Borough’s population up to 2036:

Table 11.15: Forecast potential capacity for new gyms and health/fitness facilities in Dartford Borough

	2020	2025	2030	2035	2036
DARTFORD BOROUGH AREA (Zones 1-8): POPULATION AND PROJECTED GROWTH					
1 DARTFORD BOROUGH AREA - TOTAL FORECAST POPULATION:	112,042	123,753	133,165	142,541	144,408
2 CUMULATIVE POPULATION GROWTH:	-	11,711	21,123	30,499	32,366
GYM PARTICIPATION LEVELS - MARKET SHARE (%)					
3 Gym Participation - Study Area Average Market Share:	25.5%	25.5%	25.5%	25.5%	25.5%
FORECAST GYM PARTICIPATION LEVELS - MARKET SHARE OF NEW POPULATION					
4 Gym Participation - Study Area Average Market Share (2 x 3):	-	2,986	5,386	7,777	8,253
GYM MEMBERSHIP LEVELS:					
5 UK Average ⁽¹⁾ :		1,426	1,426	1,426	1,426
POTENTIAL CAPACITY FOR NEW GYMS IN DARTFORD BOROUGH:					
		Number of Gyms:			
6 Capacity based on Study Area Participation Levels (4 divided by 5):		2	4	5	6

Sources: (1) National average participation rates derived from 'State of the UK Fitness Industry', Leisure DB.

- **Steps 1-2:** the Borough’s population is projected to increase by +32,366 over the forecast period (2020-2036). The growth forecast for Dartford East of 23,473 represents approximately 72.5% of this total growth, with an increase of 8,893 forecast for Dartford West.
- **Step 3:** shows the survey-derived gym participation level for households in Borough area. It is assumed that these participation levels will remain constant over the forecast period, although there should be an aspiration to raise the average levels for the Borough area.
- **Steps 4:** the baseline participation levels are applied to the population growth to derive the number of potential new gym members that should be available over the forecast period. The potential new gym members increase from almost 3,000 in 2025 to 8,253 by 2036.
- **Step 5:** current research shows that the average number of gym memberships in the UK is around 1,426 per club. This is the figure that has been applied to forecast the potential for new gyms; although it should be noted that gym memberships range significantly⁸⁵.
- **Step 6:** applying the average UK membership figure (step 5) to the new gym “*population*” (steps 6-8) indicates that could be potential for up to two new gyms by 2025 based on current participation levels and up to six by 2036. Based on the distribution of this population growth, we forecast that some three out of the four new gyms forecast for 2030 and four of the six gyms by 2036 will be needed to meet the needs of the new households in the Dartford East area, and specifically Ebbsfleet.

11.59 All these theoretical capacity forecasts will be subject to market demand and interest from potential operators for representation in the Borough and its main existing and planned centres.

11.60 Meeting needs over the plan period will also need to take account of the changes in the Borough’s demographic profile. Facilities, clubs and classes will need to cater for an aging population, and the different expectations of the Millennials and Generation Z groups. This may also drive the growth in demand for more specialist, niche and boutique gym offerings that specifically cater for the needs of different age groups and can sustain smaller membership levels.

⁸⁵ Memberships range from an average of 726 per club for independent venues, up to 2,198 members per club for the national operators. Average membership levels increase to 2,897 per club for the larger fitness chains (such as, for example, David Lloyd, Virgin Active, LA Fitness, etc.) and levels for the budget chains can be even higher at 3,452 members per club.

GAMBLING VENUES

11.61 Gambling represents a significant component of the leisure industry. The main sectors of the gambling industry comprise ‘*games of chance*’, namely bingo clubs, casinos, betting shops and amusement arcades. The sector has experienced significant growth and dynamic structural changes over the last decade. The latest research⁸⁶ figures show that the gambling industry in Great Britain generated a Gross Gambling Yield (GGY) for the year end to March 2019 of £14.4bn. This represented a +4.2% growth from the 2017 GGY of £13.8m. Remote (online) gambling accounted for £5.3bn of total GGY, equivalent to a market share of 37.1%, and the national lottery accounted for a further £3.1bn. The growth of remote and online gambling, alongside changes in regulations reducing maximum stakes for slot machines, has resulted in the fifth consecutive year of decline in betting premises and a -10% fall in the GGY of casinos to March 2019. The following assesses the main trends in this sector, current provision in the Borough and the potential need/demand for new uses and facilities.

Bingo

11.62 The latest statistics⁸⁷ show that the Bingo sector achieved a total turnover of £1.03bn to year-end March 2019. Total turnover has fallen by almost 30% over the last decade, from £1.43bn in March 2009. The total number of licensed premises has also fallen from 710 in 2014 to 651 in 2019. Gala Leisure (129 premises) and Mecca Bingo (88 premises) are the leading operators in the UK and accounted for one-third (33%) of all premises in 2019.

11.63 In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new ‘app’ development. This forms part of a wider trend and growth in ‘remote/online’ gambling, which includes gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. At the opposite end of the scale, research⁸⁸ shows that 55-64 age group generated the biggest growth in online gambling as more mature bingo players switch to online bingo sites, as they grow in confidence with the new technology.

11.64 The growth in online gambling and gaming is reflected by the fact that there are no national bingo operators in Dartford Town Centre following the closure of Gala Bingo on Spital Street in 2014. Notwithstanding this, the survey results summarised below show that the more informal bingo evenings in some of the pubs and clubs in the Town Centre are achieving a 12.2% market share in Dartford West (Zones 1-5). The most popular destination for those that play bingo is Buzz Bingo in Bexleyheath, which is achieving a market share of 27.2% across the total catchment area, 43% in Dartford West and 24.2%. Other popular bingo halls include Gala Bingo at Medway Valley Leisure Park in Rochester and the Mecca Bingo halls in Eltham Hill and Croydon.

⁸⁶ The Gambling Commission – Industry Statistics (November 2019)

⁸⁷ The Gambling Commission - Industry Statistics (November 2019)

⁸⁸ Gambling Commission (February 2019). Gambling Participation in 2018: behaviour, awareness and attitudes – Annual Report.

Table 11.16: Bingo clubs, casinos and bookmakers – market shares

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Buzz Bingo, Bexleyheath	43.0%	24.2%	21.6%	27.2%
Dartford Town Centre ⁽¹⁾	12.2%	0.0%	20.1%	15.9%
Abroad	0.0%	0.0%	18.3%	11.7%
Gravesend Town Centre	0.0%	0.0%	15.4%	9.8%
Gala Bingo, Medway Valley Lesiure Park, Rochester	13.4%	31.1%	0.0%	6.8%
Northumberland Heath, Bexley	0.0%	0.0%	6.9%	4.4%
Gala Bingo, High Street, Chatham	0.0%	0.0%	6.6%	4.2%
Mecca Bingo, Eltham Hill	4.6%	20.4%	0.0%	3.4%
Mecca Bingo, Tamworth Road, Croydon	12.9%	0.0%	0.0%	3.2%
Swanley Town Centre	0.0%	0.0%	4.6%	2.9%
Swanscombe Town Centre	0.0%	24.4%	0.0%	2.7%
Sidcup Town Centre	0.0%	0.0%	3.3%	2.1%
The Village Hall, Horton Road, South Darent	0.0%	0.0%	3.3%	2.1%
Rochester Town Centre	4.6%	0.0%	0.0%	1.2%
Temple Hill Square, Dartford	4.6%	0.0%	0.0%	1.2%
Crayford Town Centre	4.5%	0.0%	0.0%	1.1%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey. Appendix B: Question 29. (weighted base = 226 respondents).

Notes:

⁽¹⁾ Some 15.4% of respondents living outside the Borough in Zones 9-11 indicated that they normally visit Gala Bingo in Spital Street in Dartford Town Centre, but this club closed in 2014.

11.65 As for other leisure sectors there is limited evidence of market demand for new bingo halls or venues in the Borough. Notwithstanding this, it is recognised as a town centre use and should demand rise then new investment and development should be directed to the town centres first in line with national and local plan policy objectives.

Casinos

11.66 The latest figures published by the Gambling Commission show that casinos achieved a GYY of £1.059bn in the year end to March 2019. Although this was 10% down on GGY for 2018, there has been a circa 85% increase over the last decade from £751.1m in 2009. Casino attendances in Great Britain were estimated to be 19.24 million in 2017/18, which was down on attendances in 2014 (20.99m) and 2015 (20.44m). The figures show that London casinos had the highest attendances (5.74m), followed by the North (5m), Midlands and Wales (3.72m), the South (3.18m) and Scotland (1,45m). There were some 154 casinos in 2019 and the number of venues has increased steadily from 143 in 2009. The casino sector is dominated by two companies: the Rank Group with 67 venues has a 44% market share and Genting UK has 44 venues and a 29% market share. There has been some consolidation of the sector in the past few years, such as Rank Group's purchase of Gala Coral Casinos.

11.67 There are no casino venues in Dartford Borough. Although there is a potential gap in the market, any need for new casinos in the Borough will be driven by market demand from operators and at present it is our judgement that the town does not have the critical mass of uses or catchment to support a formal Casino offer.

Betting Shops

11.68 There were some 8,320 betting shops in the UK in March 2019. William Hill accounts for 27% (2,264) of all premises, Ladbrokes has a 22% share (1,828 premises), Tote's market share is 19% (1,620) following its purchase of Betfred, and Gala Coral Group's share is 18% (1,529). Regulatory changes in 2015 led to a fall in revenue and profit resulting in fall in the number of active premises from 9,111 in 2014. As gambling activities continue their shift to online channels, so the demand for physical

outlets will inevitably dampen in the future and more betting shops will inevitably close. Notwithstanding this, the presence of betting shops in high streets is a contentious issue in any case due to the perceived social and economic impacts on households. The Government has recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to 'Sui Generis'. This reclassification means local authorities have greater planning powers to manage the number of outlets and therefore greater potential to limit impacts.

11.69 Dartford Town Centre has a relatively good choice of betting shops including Paddy Power, Betfred and Coral. Current provision as a proportion of total outlets (1.1%) is broadly in line with the national average (1.4%). There are other betting shops located across the Borough, including in the District Centres. In our judgement, there is no demonstrable need to increase the number of betting shops to improve competition and choice at the local level.

FAMILY ENTERTAINMENT USES

11.70 Other commercial leisure facilities can be grouped together under '*family entertainment*' uses, which appeal to adults and children. Established activities in the UK include tenpin bowling, roller skating, ice skating, and similar uses. New attractions include indoor trampoline parks and golf.

Tenpin Bowling

11.71 Tenpin bowling is possibly the most popular activity in the 'family entertainment' sector. After a period of decline in the 1970s, there are now 316 venues in the UK according to Mintel figures. The UK tenpin bowling market was valued at £285m in 2017. This represented a +9.7% year-on-year growth, and was higher than the +6.7% growth recorded in 2016. It also marked the fifth consecutive year of growth.

11.72 This growth has been largely fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the more successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. The critical mass of leisure uses "*under one roof*" help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. Most of the market growth in this sector is being driven by the following two leading operators:

- **Hollywood Bowl:** Formed in August 2010 when AMF Bowling merged with Hollywood Bowl, it is now the clear market leader in the tenpin bowling sector. It operates 59 venues under the Hollywood Bowl, AMF and Bowlplex brands. It has led the way in making bowling more family friendly, investing heavily in both product (such as VIP lanes and virtual reality) and service to reduce costs and drive sales. The bowling centres are located across the UK and some three-quarters are in retail and leisure parks. Hollywood Bowl's expansion is more orientated towards opening new sites, which include new venues in Dagenham and Yeovil.
- **Ten Entertainment:** Operates 45 venues and, in contrast to Hollywood Bowl, its growth strategy is focussed more on acquisitions of distressed assets than opening new venues, and then modernising the facilities to drive growth and value. It has repositioned its business over the last six years and has transitioned away from the late night/nightclub type of operation towards more family-orientated venues. Research indicates that this strategy is working, with the market share of family trips increasing from 27% to more than 40% of visitors over this period.

11.73 There are a number of other smaller independent and specialist operators in this sector, including **All Star Lanes**, which operates five bowling venues, of which four are in London (Brick Lane, Holborn, Stratford City and White City) and the other is in Manchester (Deansgate). It is largely targeted at the corporate/private hire market. **Bloomsbury Bowl Lanes** also operates from smaller

venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, a small cinema and a venue for bands and live performers/comedy nights.

11.74 It is estimated that the 316 venues in the UK represents approximately four venues for every one million people, which compares with 13 per one million in the USA. This implies that there is scope for additional capacity in the UK in the right locations, subject to market demand.

11.75 As described above, some 31.6% of all respondents to the household survey (question 28) indicated that they visit family entertainment uses, including tenpin bowling. The table below shows the main venues and facilities these respondents normally visit.

Table 11.17: Tenpin Bowling - Market Shares

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Tenpin, Bexleyheath Town Centre	57.9%	25.2%	60.2%	56.5%
Hollywood Bowl, Medway Valley Lesiure Park, Rochester	6.6%	24.4%	11.3%	11.0%
Bluewater Shopping Centre, Greenhithe	5.7%	4.7%	7.8%	6.9%
Planet Ice, Gillingham Business Park, Gillingham	1.6%	2.4%	8.2%	5.7%
Gravesend Town Centre	4.3%	21.0%	1.0%	3.7%
Central London / West End	5.7%	4.2%	1.0%	2.7%
AMF Bowling, Imperial Business Park, Gravesend	5.0%	11.4%	0.0%	2.5%
Lakeside Shopping Centre & Retail Park, Thurrock	1.8%	2.4%	1.5%	1.7%
Westfield Stratford City, Stratford	0.0%	0.0%	2.4%	1.4%
Bluewater Ice Skating Rink, Greenhithe	1.0%	0.0%	1.5%	1.2%
Hollywood Bowl, Medway Valley Leisure Park, Rochester	1.9%	0.0%	0.5%	0.9%
Swanley Town Centre	0.8%	0.0%	0.7%	0.7%
Hollywood Bowl, Lakeside Shopping Centre, Grays	2.1%	0.0%	0.0%	0.6%
Chatham Town Centre	0.0%	0.0%	1.0%	0.6%
Tenpin, Broadwater Way, Eastbourne	0.0%	0.0%	1.0%	0.6%
Crayside Leisure Centre, Stadium Way, Dartford	1.9%	0.0%	0.0%	0.6%
Bromley Town Centre	1.9%	0.0%	0.0%	0.6%
Strood Town Centre	0.0%	0.0%	0.7%	0.4%
Tenpin, Homefield Rise, Orpington	0.0%	0.0%	0.7%	0.4%
Ruxley Manor Ice Rink, Maidstone Road, Sidcup	0.8%	1.9%	0.0%	0.4%
Royal Tunbridge Wells Town Centre	0.0%	0.0%	0.5%	0.3%
Dartford Town Centre	0.8%	0.0%	0.0%	0.2%
Sittingbourne Town Centre	0.0%	2.4%	0.0%	0.2%
Fairfield Leisure Centre, Lowfield Street, Dartford	0.2%	0.0%	0.0%	0.1%
	100.0%	100.0%	100.0%	100.0%

Source: Household Telephone Interview Survey. Appendix B: Question 36. (weighted base = 275 respondents).

11.76 The survey results highlight the fact that there are no tenpin bowling venues for residents in Dartford Borough. The main attraction is Tenpin in Bexleyheath Town Centre, which is achieving a 56.5% market share of all bowling trips made by households across the catchment. Its market share is higher in Dartford West (57.9%) as it is the most accessible and convenient venue for residents here. Tenpin is also attracting one out of every four bowling trips (25.2%) in Dartford East. The other popular venue is Hollywood Bowl in Medway Valley Leisure Park (24.4%). AMF Bowling at Imperial Business Park in Gravesend was also achieving a strong market share of 32.4% across the catchment area, but we understand that this facility has since closed.

11.77 Based on current provision and participation levels there is a potential need, subject to market demand, for a tenpin bowling venue in Dartford Borough to serve its existing and forecast population, and to help claw-back trips that are currently leaking out of the Borough to venues in neighbouring authorities. The floorspace requirements of operators vary between the larger venues operated by

Hollywood Bowl and Ten Entertainment and the smaller venues run by independent operators. We understand, for example, that Hollywood Bowl is generally seeking sites and/or premises with a gross floorspace of between 1,208 sqm and 2,787 sqm (13,000 sqft – 30,000 sqft), but its preference is for larger format venues. The smaller bowling operators are better able to locate in existing/repurposed premises, such as shopping centres for example, subject to meeting their space requirements.

Ice Skating

11.78 Ice Skating provision can range from permanent venues owned and operated by local authorities and/or the private sector, to temporary ice rinks in centres, retail outlets and leisure destinations normally over the Christmas period. These venues can help to generate new trips and increase footfall, dwell times and expenditure in centres to the benefits of other shops and businesses. The main seasonal provision for residents in Dartford Borough is the Bluewater Ice Skating Rink, which usually opens from the end of November to early January. As Table 11.16 shows, Planet Ice in Gillingham is the main permanent ice rink that is drawing trips by households across the wider catchment area and from within Dartford Borough. The fact that there is no dedicated ice rink in Dartford Borough could point to a potential need, although we are not aware of any market demand from the main operators. In the absence of a permanent facility, there could be potential to provide a temporary ice rink in the Town Centre at Christmas to help bolster trips, similar to that provided at Bluewater.

11.79 On average Ice Rinks require a gross floor area of up to 1,858 sqm (20,000 sqft) and usually with a 60m by 30m dimension (e.g. Alexandra Palace, Blackburn Ice Arena and Gosport Ice Rink). In the absence of any potential demand for a permanent facility in the Borough, there is potential for a 'pop-up' ice rink in Dartford Town Centre at Christmas to help attract more trips and linked expenditure, similar to that provided at Bluewater.

Trampoline Parks

11.80 Since the opening of the first indoor parks in the UK in 2014, trampolining has become one of the UK's fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250-300 parks before saturation is potentially reached. This mirrors the growth in the United States and Australia, where parks first emerged in the early to mid-2000s. There are an estimated 800 venues in the US. The main operators in this sector include:

- **Oxygen Freejumping:** Its growth has been driven by opening parks in Acton (West London), the O2 in Greenwich, Croydon, Derby and Southampton. It also acquired Air Space in 2017, a subsidiary of the high wire adventure company Go Ape, in a multi-million pound deal funded by a London-based private investment company. Air Space had three parks in East Kilbride, which opened in November 2014, Stevenage and Wolverhampton. However Oxygen subsequently closed the park in East Kilbride in June 2018 and the Wolverhampton park closed in December 2018 due to "trading difficulties".
- **Ryze:** The Scotland-based operator currently operates three parks in Edinburgh, Glasgow and Dundee. The Edinburgh park is located in the Mayfield Industrial Estate in Dalkeith and covers 1,208sqm (13,000 sqft). The Glasgow park extends to 929 sqm (10,000 sqft) in a former warehouse in Kinning Park
- **Gravity Active Entertainment:** The Castleford-based operator has 11 parks, mainly as part of existing shopping or adventure centres. Its venues include the Xscape in Castleford and Milton Keynes, Rockingham Leisure Park (Corby), Bluewater Shopping Centre, Fountain Park (Edinburgh), Soar Braehead (Glasgow), St Stephen's Shopping Centre (Hull), Cardigan Fields

(Leeds), Lockmeadow Entertainment Centre (Maidstone), Sol Central (Northampton) and Riverside Entertainment Centre (Norwich).

- 11.81 The public sector has also been investing in this activity. For example, Eastbourne Borough Council, Waltham Forest Council (London) and Tameside Metropolitan Borough Council (Manchester) are just three of the many local authorities that have invested in indoor trampoline parks as part of their leisure provision. At Tameside, for example, the new *Total Adrenaline* trampoline park, which opened in November 2016, forms an important part of a £20m investment project that aims to get people more physically active.
- 11.82 Research shows that, on average, over one-third of “jumpers” are aged between 6-10 years and over one-quarter are aged between 11-15 years. These younger age groups require a parental guardian or authorised person for entry and, as a result, the trampoline venues are attracting wider families and groups, who are generating ‘spin-off’ expenditure to other uses and facilities both within and outside the venues. In response to the broad range of “jumpers”, not just the young, trampoline parks are increasingly offering a range of activities and experiences that cater to the needs of a broader demographic, including dodge-ball tournaments, rock-climbing, ninja courses, laser tag and other social events.
- 11.83 The main and only dedicated trampoline park in Dartford Borough is the Gravity Trampoline Park in Bluewater. Other similar venues outside the Borough include Airjump Trampoline Park in Orpington and Jump Giants Trampoline Park in Thurrock. We are not aware of any requirements from other trampoline operators for representation in the Borough, although recent trends have seen trampolines introduced into vacant and repurposed larger format shop units in town and shopping centres. This may represent a potential opportunity to “refresh” the offer in Dartford town centre, dependent on market demand and the availability of suitable sites and premises to meet operators’ needs. In general we understand that most trampoline park operators are seeking premises and/or sites with a gross area of between 2,323 sqm and 3,252 sqm (25,000 sqft – 35,00 sqft).

ART, CULTURAL & MUSIC LEISURE ACTIVITIES

- 11.84 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. As described above, over half (53.8%) of respondents to the household survey indicated that go to the theatres, concerts and other music venues as a leisure activity. This ranged from 56.7% of respondents in Dartford East to 50.7% in Dartford West.
- 11.85 When asked where they normally go (question 32) the table below shows that almost half (48.7%) of respondents in the wider catchment area visit the Orchard Theatre in Dartford Town Centre. The theatre is achieving a 56.9% market share in Dartford West and 50.2% in Dartford East. After the theatres and attractions in London and the West End, there are a number of other relatively popular formal and informal venues in Dartford Town Centre. These include the Mick Jagger Arts Centre that opened in 2000 in the grounds of Dartford Grammar School where Mick Jagger was a pupil. The centre has two main performance spaces, a recording studio, rehearsal rooms, a bar and gallery.

Table 11.18: Theatres, Concerts & Live Music: Market shares by catchment

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
The Orchard Theatre, Dartford	56.9%	50.2%	43.3%	48.7%
Central London / West End	33.1%	35.8%	46.9%	41.0%
Orchards Shopping Centre, Dartford	3.0%	2.3%	1.5%	2.1%
Dartford Town Centre	2.9%	4.1%	1.1%	2.1%
The O2, Greenwich Peninsula	1.7%	0.7%	2.0%	1.7%
Dartford Open Air Theatre, Central Road, Dartford	1.0%	0.0%	2.3%	1.6%
Bluewater Shopping Centre, Greenhithe	0.7%	3.2%	0.3%	0.8%
The Mick Jagger Arts Centre, Shepherds Lane, Dartford	0.5%	0.6%	0.0%	0.2%
Royal Opera House, Bow Street, Covent Garden	0.3%	0.0%	0.0%	0.1%
The Geoffry Whitworth Theatre, Beech Walk, Crayford	0.0%	1.1%	0.0%	0.1%
Guildford Town Centre	0.0%	0.9%	0.0%	0.1%
Showcase, Bluewater, Greenhithe	0.0%	0.6%	0.0%	0.1%
Gravesend Town Centre	0.0%	0.5%	0.0%	0.1%
Brighton Town Centre	0.0%	0.0%	0.6%	0.3%
The Royal Albert Hall, Kensington	0.0%	0.0%	0.6%	0.3%
Bromley Town Centre	0.0%	0.0%	0.6%	0.3%
The Woodville, Woodville Place, Gravesend	0.0%	0.0%	0.4%	0.2%
Hyde Park, London	0.0%	0.0%	0.4%	0.2%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey. Appendix B: Question 32. (weighted base = 530 respondents).

11.86 Some 38% of all respondents to the household survey also indicated that they normally visit museums, galleries and places of historic/cultural interest as a leisure activity. It should be noted that participation levels in Dartford West (37.6%) and Dartford East (27.6%) were lower than for those respondents living outside the Borough (40.5%).

Table 11.19: Museums, galleries and other places of historic/cultural interest: Market shares

	Dartford West (Zones 1-5)	Dartford East (Zones 6-8)	Outside Borough (Zones 9-11)	TOTAL
Central London / West End	81.7%	88.9%	95.0%	90.1%
Dartford Town Centre	7.4%	4.2%	1.3%	3.5%
Abroad	3.1%	0.0%	1.3%	1.7%
Maidstone Town Centre	0.0%	0.0%	1.5%	0.9%
Dartford Borough Museum, Market Street, Dartford	2.5%	1.0%	0.0%	0.9%
Greenwich Local Centre	1.1%	0.0%	0.0%	0.4%
Knole Park, Sevenoaks	1.1%	0.0%	0.0%	0.4%
Darenth Village Centre, Dartford	1.1%	0.0%	0.0%	0.3%
The Greenwich Gallery, Peyton Place, Greenwich	0.0%	0.0%	0.6%	0.3%
Tate Modern, Bankside	0.0%	0.0%	0.4%	0.2%
Truro City Centre	0.7%	0.0%	0.0%	0.2%
Dartford Open Air Theatre, Central Road, Dartford	0.6%	0.0%	0.0%	0.2%
Bamburgh Castle, The Wynding, Bamburgh	0.6%	0.0%	0.0%	0.2%
Chartwell, Mapleton Road, Westerham	0.0%	1.8%	0.0%	0.2%
Gravesend Town Centre	0.0%	1.8%	0.0%	0.2%
Dover Castle, Castle Hill, Dover	0.0%	1.4%	0.0%	0.1%
Scotney Castle, Finchcocks, Lamberhurst, Tunbridge Wells	0.0%	1.0%	0.0%	0.1%
Chatham Town Centre	0.2%	0.0%	0.0%	0.1%
TOTAL:	100.0%	100.0%	100.0%	100.0%

Source: Household Survey. Appendix B: Question 33. (weighted base = 355 respondents).

11.87 As the table above shows the museums and galleries in London are the most visited destinations for all households in the catchment area. Dartford Town Centre is the next most popular and specific

mentions were made of the Council owned museum on Market Street, in the same building as the Central Library, which sets out the story of Dartford.

SUMMARY

- 11.88 The commercial leisure industry is a dynamic and evolving sector and, like the retail sector, it has faced and is facing significant challenges and pressures from changes in the economy, policy and consumer trends. It is clear, for example, that households are becoming increasingly selective in terms of where and how they spend their disposable income on leisure activities. The growth in “*at-home*” entertainment and activities, particularly screen-based entertainment, and the growing share of home deliveries represents a further challenge for town centres and leisure operators to attract customers and particularly younger generations away from their homes and screens.
- 11.89 These trends will be further accelerated by the impact of COVID-19 and social distancing on leisure patterns and the viability of leisure businesses over the short term. It follows that reduced trips and spend in “*traditional*” restaurants, cafés and bars will inevitably result in further failures and closures nationally and at the local level.
- 11.90 Notwithstanding these background trends, our review of the Borough’s commercial leisure sector and offer, informed by the results of the household survey, has highlighted that there is scope to refresh and improve the scale and quality of its leisure offer, both in the west of the Borough (comprising Dartford Town Centre) and in the East (comprising Ebbsfleet and Bluewater). In particular, the research evidence confirms that the Orchard Theatre is a popular and important venue in the town centre that is drawing visitors from beyond Dartford’s “*core*” (shopping) catchment. There is significant potential to build on its attraction and success.
- 11.91 The most notable “gap” in the town centre’s offer is the lack of a cinema. The proposals for the regeneration of Hythe Street (Westgate Dartford) will help to address this need, if permitted, and will create a strong leisure offer for Dartford that complements the theatre and other attractions. The provision of quality food and beverage operators as part of the Westgate Dartford proposals and elsewhere in the town centre (e.g. the Lowfield Street scheme) will strengthen the town’s daytime offer and significantly boost its overall attraction as an evening destination, with the potential to draw new visitors from within its core catchment and beyond.
- 11.92 There is also potential to increase the choice of gyms and health/fitness facilities across the Borough, particularly to serve the needs of the significant population growth in the Ebbsfleet area.
- 11.93 Other leisure activities, such as casinos and family-based activities (e.g. ten-pin bowling, trampoline parks, ice/roller skating, indoor golf, climbing, etc.) will be subject to market demand. Although the priority should be to direct these uses to Dartford Town Centre first, it could be that some of the uses are more suited to Bluewater and Ebbsfleet due to their scale and the fact that they may depend on a wider regional catchment to support their viability.
- 11.94 As with all leisure activities and uses, any identified need will be subject to market demand and investor preferences. Where leisure uses are proposed outside of existing centres these should be normally be subject to the sequential and impact tests set out in the NPPF.

**12. KEY FINDINGS & RECOMMENDATIONS:
SEE PART 2 STUDY**

- END -

