Topic Paper 7

Retail

Version 1.0

Swale BOROUGH COUNCIL
NORTH KENT COAST

TOPIC PAPER 7: RETAIL

Introduction

This topic paper is one of a series, prepared by the Council, to support preparation of its Local Development Framework (LDF). The topic papers in the series comprise:

1. Demography and Social Trends
2. Policy Context
3. The Natural Environment
4. The Built Environment
5. The Economy
6. Tourism
7. Retail
8. Housing
9. Leisure and Open Space
10. Water
11. Transport

The purpose of the papers is to provide all parties who may wish to participate within the Local Development process access to the same baseline information that the Council intends to use in the preparation of its Development Plan Documents and Supplementary Planning Documents. They provide a digest, rather than a substitution, for fuller information obtained from other sources. Other topic papers may be added over time.

Should you have any questions relating to the content of these papers, please contact planningpolicy@swale.gov.uk.

Background

National Context

1. Planning Policy Statement 4: Planning for Sustainable Economic Growth was published in December 2009. PPS4 is supported by detailed practice guidance on assessing need, impact and the sequential approach. It states that local planning authorities should positively and proactively plan for economic growth, simplify the planning process where appropriate (including using simplified planning zones), support existing business sectors and ensure that site allocations for economic development, particularly if for single or restricted uses, are not carried forward between plans without evidence of need and a reasonable prospect of use.
2. The Government's objectives for prosperous economies and sustainable economic development, including by promoting the vitality and viability of town centres, are to:
   - Encourage new economic growth and development of main town centre uses in existing centres, with the aim of offering a wide range of services to

communities and remedying deficiencies in provision in areas with poor access to facilities;

- Encourage competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres; and
- Conserve and, where appropriate, enhance the historic, archaeological and architectural heritage of centres to provide a sense of place and focus for the community.

3. Policy EC5 of PPS4 says that in selecting sites for main town centres uses local planning authorities should:
   - Base their approach on the identified need for development;
   - Identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served;
   - Apply the sequential approach to site selection;
   - Assess the impact of sites on existing centres; and
   - Consider the degree to which other considerations such as any physical regeneration, benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.
4. Policy EC5 also makes clear that an apparent lack of sites of the right size and in the right location should not be a reason for local planning authorities to avoid planning to meet the identified need for development.

Regional Policy Background

5. For the time being, the South East Plan continues to be of relevance. Policy TC1 of the Plan says that a network of strategic town centres will be developed across the region. It goes on to say that: “Local planning authorities should carry out regular assessments of town centres in the network”. It identifies Sittingbourne as a “secondary regional centre” in which some growth is expected.

Local Policy Background

6. The Swale Borough Local Plan 2008 sets out policy requirements for protecting the vitality and viability of the Borough’s town centres (Sittingbourne, Sheerness and Faversham). The associated proposals map defines the town centre boundaries of Sittingbourne, Sheerness and Faversham, together with core and secondary shopping areas.
7. Policy B3 sets out the Borough’s objectives for maintaining and enhancing the function, vitality and viability of the town centres and built up areas by protecting their retail function. Policy B4 defines Sittingbourne as a Principal Shopping Centre and Faversham and Sheerness as Urban Service Centres. The policy states that in the defined built-up areas of Faversham, Sheerness and Sittingbourne, new retail and leisure development will generally only be

permitted for sites allocated in the Local Plan, or in the town centre Area Action Plans, as defined on the Proposals Map. The policy further states that, in accordance with the sequential approach, if it is demonstrated that a town centre site is not available, a site on the edge of the town centre may be acceptable subject to criteria 2 (impact) and 4 (accessibility) of the policy being met. Proposals for retail development in areas outside of the town centre boundary, not allocated in the Local Plan, Area Action Plan or in edge of centre locations, are subject to a number of tests including the sequential test, impact on the viability and viability of existing town centres and accessibility. A further test requires the applicant to review the provision of other land uses, particularly the supply of land for employment, housing, community use and open space.

8. The Area Action Plan (AAP7) for Sittingbourne states the Borough will grant planning permission for proposals that:
    1. Maintain and enhance the retail provisions of the core shopping areas, whilst introducing uses that provide greater vitality, viability, diversity, activity and colour;
    2. Maintain and enhance key non-retail uses that underpin the retail or community functions of the town centre;
    3. provide for the introduction of appropriate non-retail uses in the secondary shopping areas in accordance with Policy B3;
    4. Provide for further residential development within space above commercial premises and within redevelopment sites as part of mixed-use proposals, including affordable housing where appropriate;
    5. Maintain and increase office floorspace in and around the main shopping streets and at first floor level;
    6. Retain and enhance Central Avenue, Roman Square and the Avenue of Remembrance as a location for civic and cultural facilities;
    7. Would provide for a ‘learning hub’ to extend learning provision in the town;
    8. Reduce the visual dominance of St. Michael’s Road by environmental enhancement and an improvement in the pedestrian environment; and
    9. Improve the urban environment by redeveloping visually poor areas, retaining and enhancing green spaces, creating new spaces, squares and public art, and undertaking street tree planting, and improved lighting and street furniture, on the main routes in and around the centre.
9. The Sittingbourne Town Centre and Milton Creek SPD was adopted in September 2010 and indicates the future general urban structure and layout of the area; the amount and type of land uses; the overall design approach to the built environment and the public realm; transport and infrastructure arrangements to deliver the Masterplan; phasing of development; and criteria for sustainable design and buildings.
10. In planning terms, the key objectives of the masterplan are to:
    1. Create a thriving mixed-use town centre;

2. Increase and widen the range and mix of facilities in the town centre in the town with a particular emphasis on culture and education, skills and job opportunities;
3. Improve the quality of the town's retail offer through a retail core to the north and south of the railway line joined up by a landmark bridge over the railway line; and
4. Improve and encourage the vitality and viability of the retail offer including local independent traders' as well national chains.
5. The Area Action Plan (AAP1) for Faversham states the Borough will grant planning permission for proposals that:
6. Conserve and enhance the architectural and historic fabric of the centre;
7. Retain and enhance the lively, distinctive, wide-ranging and traditional mix of activities in the shopping streets;
8. Retain and /or add to the range of services considered important to the health of the town;
9. Widen the range of activities and facilities available for residents and tourists in the town;
10. Make appropriate use of the floorspace on upper floors for new housing and/or businesses; and
11. Maintain and improve the range and diversity of employment sites and uses.

11. The Area Action Plan (AAP4) for Sheerness states the Borough will grant planning permission for proposals that:
    1. Retain or add to the range of shops and services considered important to the health of the town, and which add vitality, viability, diversity, activity, colour and distinctiveness of the area;
    2. Introduce new housing into the centre, provided that the risk posed by flooding can be addressed;
    3. Support or enhance the town's seaside location and tourism potential, particularly those that widen the range of activities available for visitors in the evenings;
    4. Make use of vacant floorspace above ground floor commercial premises, for housing and office accommodation; and
    5. Support the community's learning, skills, and health needs.

Swale Retail and Town Centre Study 2010

12. In 2010 Swale Borough Council commissioned CBRE to undertake a retail study to inform the Core Strategy. The following section details its principle findings.

Health check of main centres

13. The study considered the vitality and viability of the key centres in Swale Borough. These included Sittingbourne, Faversham and Sheerness town centres and the local parades in Queenborough, Rushenden, Halfway Houses,

The Meads, Minster and Milton Regis. This topic paper considers the three main towns only.

14. The study draws on the performance indicators of town centre vitality and viability set out at Annex D of PPS4 (Town Centre Health Check Indicators). The author's also drew upon their in-house data combined with observations from site visits, Experian Goad and other sources, such as the Valuation Office. The health check indicators are:

- Diversity of main town centre uses;
- The amount of retail, leisure and office floor space in edge of centre and out of centre locations;
- The potential capacity for growth or change of centres within the network and opportunities for centres to expand or consolidate;
- Retailer representation and intention to change representation;
- Shopping rents;
- The proportion of vacant street level property;
- Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental);
- Pedestrian flows;
- Accessibility;
- Customer and residents' views and behaviour;
- Perception of safety and occurrence of crime; and
- The state of the centre's environmental quality.

15. PPS4 introduced an additional health check indicator relating to land values. In the absence of any specific data relating to trends in land values in the town and local centres of the Borough, the authors used a broader analysis, based on their experience in terms of the fact that land values had fallen back considerably since their peak in the mid to late 2007. Anecdotally, in some cases, they found that values had fallen by over 50%, reflecting weakening demand and commercial yield prospects. This trend was felt to undoubtedly have impacts on Swale Borough too, although it was not possible to comment in detail on any specific sites or locations.

16. PPS4 recognises that none of the individual indicators provide a definitive picture of town centre health and performance. The value of the indicators derives from them being considered together.

Sittingbourne

17. Sittingbourne is approximately 14 miles north east of Maidstone, nine miles east of Gillingham and 14 miles west of Canterbury. These centres, together with Bluewater are significant competitors. The main shopping provision is located along a traditional linear High Street which is supported by a small covered shopping centre (The Forum), more or less centrally located. The centre is not particularly compact. Sittingbourne is classified as a town centre in the Local Plan.

Table 2.1

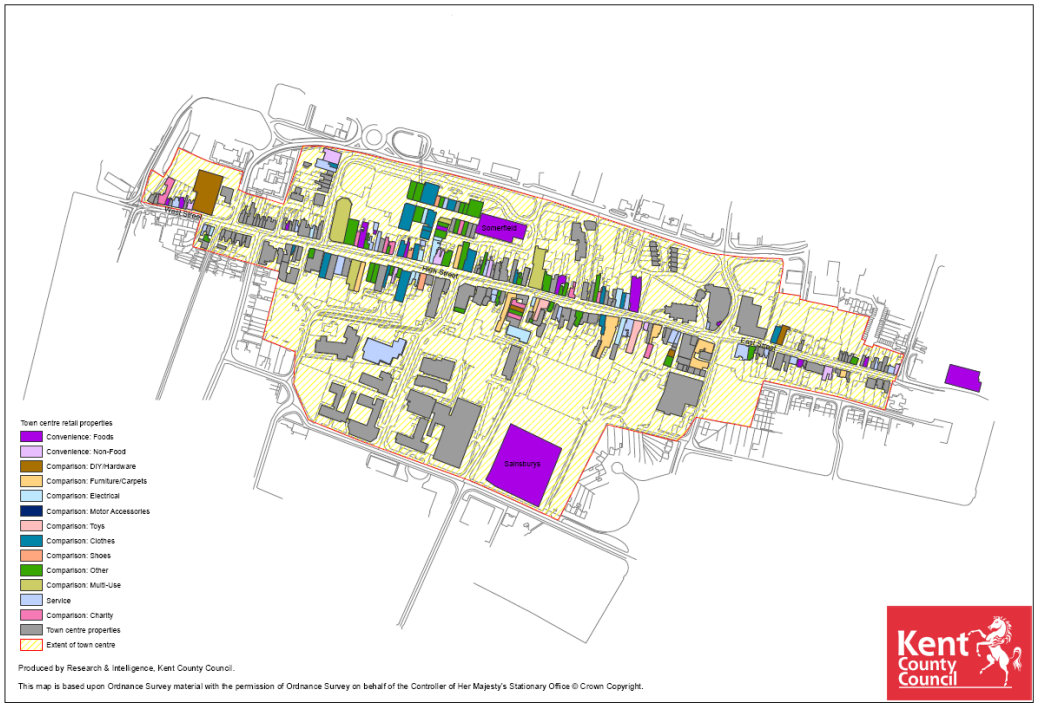
Uses in Sittingbourne Town Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	16	6.78	9.52	-2.74
Comparison	102	43.22	42.62	+0.60
Service	75	31.78	34.20	-2.42
Vacant	39	16.53	12.45	+4.08
TOTAL	236			

Source: Goad Experian Report 2009

Sittingbourne town centre retail properties

Map 2



18. The study concluded that Sittingbourne was a vital and viable centre, although there was scope for improvement. The centre was found to be reasonably diverse, and offers a mix of independent and multiple retailers. In floorspace terms, there was a slightly above average representation of convenience retailers – including multiples such as Somerfield (and in due course Tesco), a large Sainsbury's, Iceland and Aldi.

19. There was found to be a fairly broad representation of comparison retailers and some high street fashion outlets though the quality of the offer is mostly discounter or mid market. Sittingbourne also was found to have a reasonable service sector provision though there is a limited national chain representation. The leisure offer was found to be more limited and could be enhanced and diversified.

20. The study found that the centre has, however, few large modern retail units available and that The Forum was somewhat dated. Provision of some larger units would be attractive to multiple retailers and, in turn, may serve to strengthen the centre.

21. The quality of the environment on the High Street was considered to be good with well maintained carriageways and attractive landscaping. There are,

however, secondary areas of the town which are poorly maintained and in need of upgrading. This includes the Bell Centre, the surrounding car park and the vacant Petrol Station site, Dover Street. Connections off the High Street might also be improved including from the train station.

Faversham

22. Faversham is located more or less centrally between Sittingbourne and Canterbury just to the north of the A2. The shopping provision is mostly centred around three streets – West, Court and Preston Street - with the focal point being the historic Market Place. The centre also benefits from many buildings of high architectural quality, reflecting the historic nature of Faversham. The centre is fairly compact and designated as a town centre in the local plan.

Table 2.7

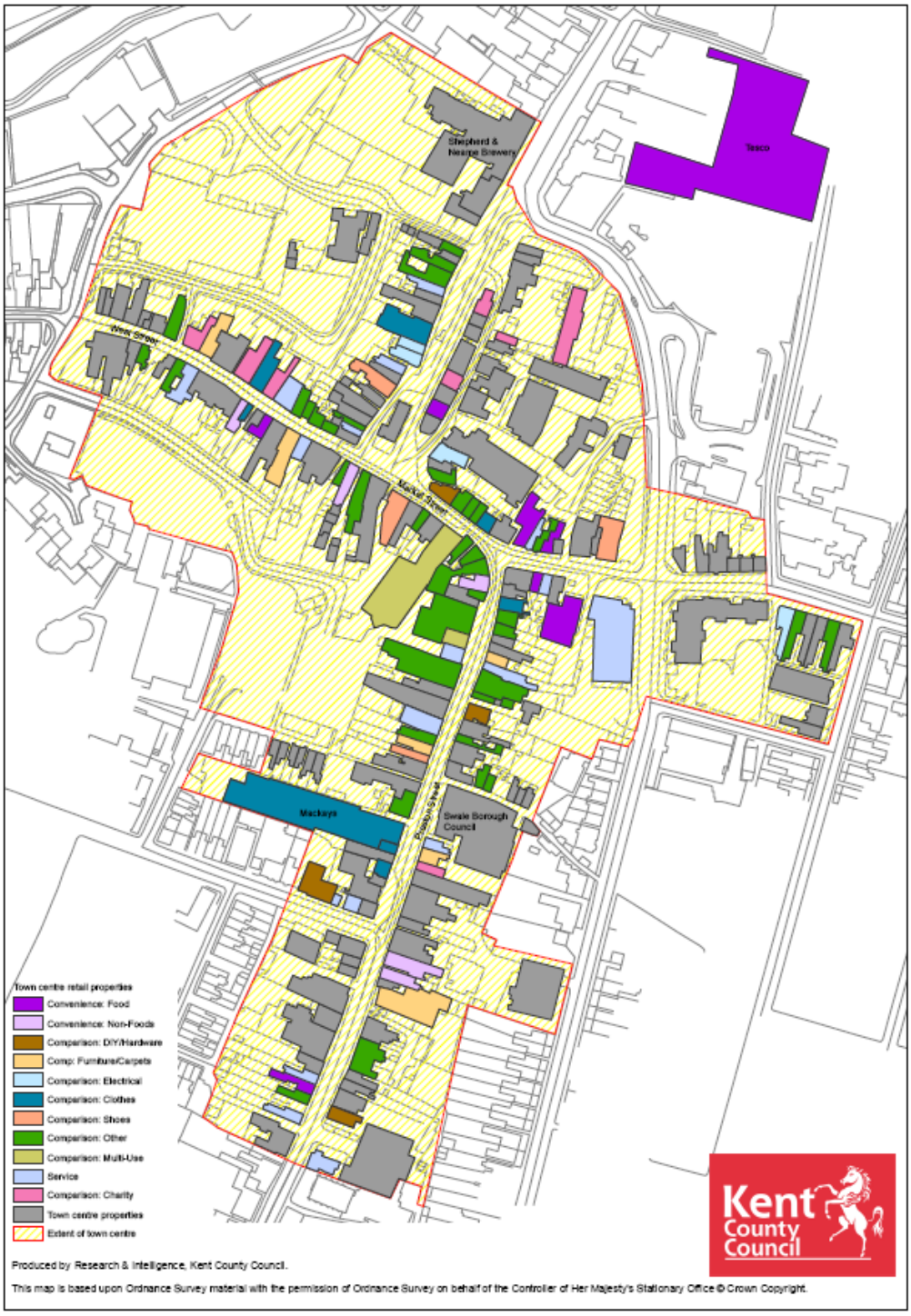
Uses in Faversham Town Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	13	7.93	9.52	-1.60
Comparison	90	54.88	42.62	+12.3
Service	45	27.44	34.20	-6.76
Vacant	15	9.15	12.45	-3.30
TOTAL	164			

Source: Goad Experian Report 2007

Faversham town centre retail properties

Map 2



23. The study concluded that Faversham was a healthy and attractive town centre, despite an increase in vacancies in recent years which will need to be monitored. In line with increased retailer confidence, the study found that there were signs that Faversham town centre's vacancies were decreasing. The town's key strengths and weaknesses were found to be:

- Its uniqueness and good sense of place due to the historic nature of the town and the range of independent retailers, galleries and museums.
- The quality of the public realm is mostly good particularly in the main shopping areas although the quality of street furniture, lighting and planting could be improved.
- Unit sizes are generally small and would not readily attract multiple retailers. This, however, may not be a concern if Faversham is seeking to retain a strong independent diversity. Generally, however, a good range of unit sizes is advocated to achieve a balanced retail mix. It must be acknowledged that some units are particularly small, and unlikely to appeal to many retailers including independents. The level and location of the town's cycle facilities could be improved.

Sheerness

24. Sheerness is located on the north coast of the Isle of Sheppey. It is in a fairly isolated location with a well defined catchment population. The town is linked to the mainland via the A249 link road, which connects to the M2 motorway. A rail service to Sittingbourne (and some destinations to the south of Sheerness) connects to the mainline services to London stations.

25. Sheerness has a traditional linear high street running from east to west with the Broadway (running perpendicular to the high street) also offering an element of retailing. The central focal point of the centre is at the junction of Broadway and the High Street. Sheerness is defined as a town centre in the local plan, and its scale is likely to meet short to mid term shopping needs.

Table 2.9

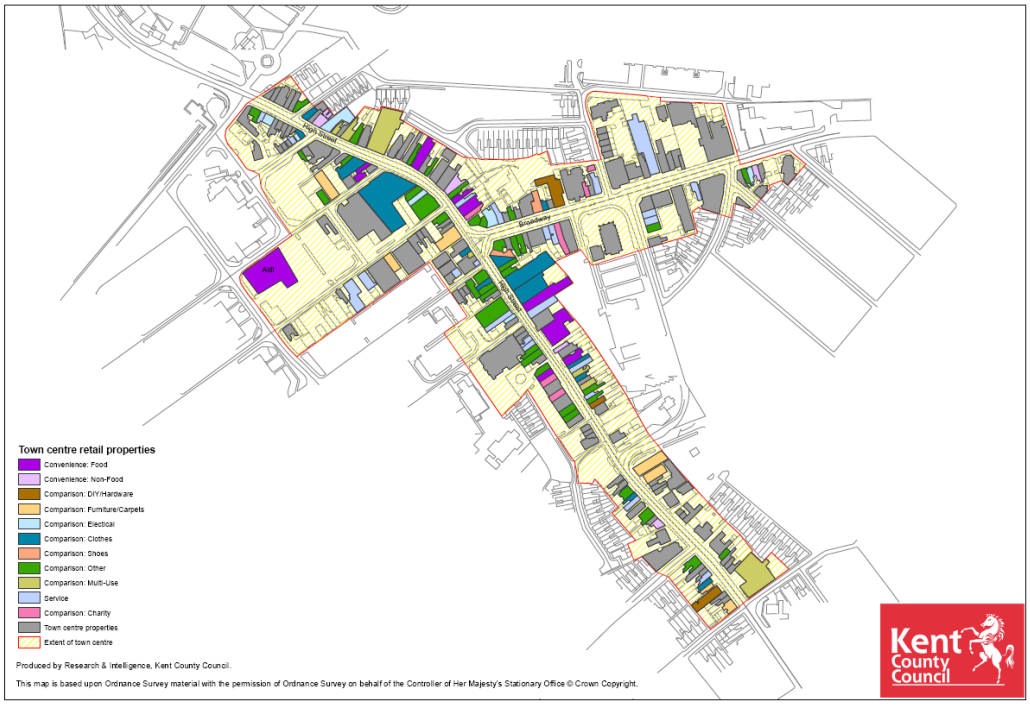
Uses in Sheerness Town Centre by Units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	17	8.72	9.52	-0.80
Comparison	92	47.18	42.62	+4.56
Service	70	35.90	34.20	+1.70
Vacant	15	7.69	12.45	-4.76

Source: Goad Experian Report 2009

Sheerness town centre retail properties

Map 2



26. The study found that Sheerness was a fairly healthy centre. Its key strengths and weaknesses were:

- The balance of uses is good with no one dominant use. The range of foodstores/foodstuffs on offer is also good, although the main foodstore anchor is poorly connected to the centre.
- The centre has few large, modern units which would be more attractive to multiple retailers.
- The quality of comparison offer is moderate at best, and focussed primarily on the discount market. Equally, the centre has very little to offer by way of higher quality eateries and cafes.
- The quality of the centre's environment is fair. Public realm improvements should be considered to improve the centre's attractiveness. In particular, the Clock Tower area is a clear candidate for enhancement.

27. Overall, the author's had concerns that the trading environment of Sheerness is declining. They considered that this situation should be monitored carefully, and actions taken now to help strengthen the centre. This could be in the form of a short action plan, detailing a range of initiatives that could enhance the physical appearance of the centre alongside supporting business in the town.

Quantitative capacity for new retail floorspace

28. The study examined the capacity for additional retail floorspace at 2015, 2020 and 2025. In doing so it took into account projected population growth, projected increases in expenditure, changes in the proportion of shopping undertaken online and improvements in floorspace efficiency.

Convenience goods

In the convenience goods sector, based on constant market shares and before allowing for overtrading, no capacity for additional comparison goods floorspace was identified. In fact, once current commitments are taken into account, there was an oversupply of floorspace, at Borough-wide level and for smaller sub-areas based around the major settlements of Sittingbourne, Sheerness and Faversham.

The table below provides a summary of the level of convenience floorspace available at each test year.

Table 5.1
Borough wide convenience capacity

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	-5,429
2010-2020	-4,992
2010-2025	-4,492

29. Further analysis revealed that a number of stores in the Borough were trading well above company average. Once this overtrading was addressed, some capacity for new floorspace arises, most notably in the area surrounding Sittingbourne, was identified.

30. The study found that the Borough has an unusually high retention level, and considered that there was no case for seeking to improve it. Much the same was true of the sub-areas, particularly for Sheerness and Isle of Sheppey which retained some 87.4% of available expenditure. It was recognised that the catchment area assumed for Sittingbourne had a slightly lower retention (79.3%), which reflected the fact that settlements between Sittingbourne and Faversham were shared between each of these towns.

31. Similarly, Faversham was found to have a lower retention (of 70.8%); again as a result of the fact that is catchment is shared. In fact, a sizeable proportion of residents of settlements east of Faversham were found to travel to stores in Canterbury and Whitstable - entirely reasonable, given the proximity of the stores close to the Borough boundary.

32. The study found that there was no case for seeking to improve the convenience market shares at Borough-wide level or at a settlement specific level.

Comparison goods

33. 5.9 In the comparison goods sector, the study suggests that stores in Swale Borough retain almost exactly half of all available expenditure in the study area. In the immediate term, it was anticipated that there was an oversupply of comparison floorspace, due largely to new commitments and an increase in the efficiency of existing retail floorspace. In the longer-term, it was anticipated that there would be some capacity for new floorspace: some 4,500sqm net by 2020 and nearly 14,000sqm net by 2025.

34. The table below provides a summary of the level of comparison floorspace available at each test year using the existing retention scenario.

Table 5.2

Comparison capacity (static retention)

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	-2,255
2010-2020	4,622
2010-2025	14,058

35. These findings assume that the Borough's retention level of 50.1% remains. If the Borough were to seek an increase in market share there is potential capacity for additional retail floorspace. The study modelled a market share of 60.0%, based on an assumption that the Borough would attract more shoppers through an enhanced retail offer in Sittingbourne town centre and elsewhere. In was considered to be the maximum (and ambitious) level of retention expected for the Borough based on the improvements proposed and in the experience of the studies authors.

36. The table below provides a summary of the level of comparison floorspace available at each test year using the increased retention scenario.

Table 5.3

Comparison capacity (increased retention at 60%)

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	7,656
2010-2020	16,863
2010-2025	29,227

37. The studies analysis was focussed on the Borough as a whole. Although a more fine-grained centre-based analysis would have identified some capacity for each of the centres (in order to maintain their market share), it was the author's view that substantial new comparison floorspace could or should be directed to Faversham or Sheerness, for three reasons:

    1. People generally travel further to higher order centres when they want a wider choice of shops. Sittingbourne is therefore likely to be a more realistic prospect for delivering new floorspace, as it already has a greater range of shops;
    2. Identified sites in Sheerness and Faversham would be more challenging to develop than those in Sittingbourne, so there are much better prospects for bringing forward additional floorspace in Sittingbourne; and
    3. Notwithstanding the fact that the South East Plan is unlikely to exist in the medium- to long-term, it identifies Sittingbourne (and not Faversham or Sheerness) as a secondary regional centre, in which some growth is expected.

Quantitative deficiencies and potential remedies

38. The study identified a number of relatively minor deficiencies, along with potential remedies to address them. Two key deficiencies identified were:

    1. the overtrading of convenience stores, particularly in Sittingbourne. This will be remedied only partially by new committed floorspace. The study recommends that this should be addressed through the provision of new

floorspace in, or close to, that centre (subject to an assessment of impact in accordance with PPS4); and

2. the absence of a main food convenience offer on the eastern side of the Isle of Sheppey. There may, therefore, be a case for a new store to address this, although this requires further investigation and would be subject to an assessment of impact.

Prospects for meeting the need

39. The study examined potential development sites in each of the principle centres. It found however that opportunities to extend the retail offer in Faversham and Sheerness were more limited than in Sittingbourne. In particular, opportunities in and on the edge of Faversham town centre were very limited and/or with challenges.

40. In Sheerness there was more scope to improve the retail offer through new floorspace. Even so, the study found that the sites identified would, in most cases, need proactive action by the Council if they were to come forward for development.

41. Sittingbourne was found to have the greater opportunity to extend its retail offer. The key opportunity was focussed on land at The Forum and to the south of the railway station. If suitability designed, the study found that land could connect well with Sittingbourne's existing Primary Shopping Area. Work has already been undertaken to assess the potential of this land through the preparation of a town centre SPD, which also identifies this as a key opportunity for retail development.

42. The study recommends that the Council should continue to support the delivery of a scheme in this area in order to help address the identified retail capacity. This could include the Council being willing to use its own land and CPO powers to assemble a site.

43. In accordance with the guidance set out in PPS4, the study recommends that the Council promotes new retail development in the town centre as a priority and then consider edge-of-centre sites. Any proposals within edge-of-centre locations should be considered during the plan making process or, if they are promoted earlier, should be subject to the full rigours of PPS4 and the associated impact tests.

Implications arising from scales of growth

44. The studies expectation was that new floorspace in Sittingbourne would, provided it is sufficiently large to appeal to mainstream national multiple retailers, help to claw back expenditure from centres which themselves have a wide range of national multiples, such as Maidstone and Canterbury. The impact on Faversham and Sheerness was considered to be limited and unlikely to impact on trade within the smaller centres within the Borough. However, further testing of potential impacts was recommended before sites are allocated, in accordance with the requirements of PPS4 (Policy EC5.1d).

Potential retail hierarchy

45. The approach recommended by the study would secure Sittingbourne's status as the largest of the Borough's centres. It would not, however, justify its

designation as anything other than a town centre, as its characteristics would remain consistent with the definition in PPS4. Faversham and Sittingbourne would remain as town centres, again reflecting the definition in PPS4. The study found no case for elevating any of the local centres to district centre status, unless substantial new development is to take place in any one of them.

Changes to the extent of town centres and boundaries

46. For Sittingbourne, the existing shopping provision is located along a traditional linear High Street which is supported by a small covered shopping centre (The Forum). There are also some secondary retail areas along the side streets and two food-stores within the town centre boundary – Sainsbury's and Aldi.

47. The existing primary and secondary frontages largely reflect the retail provision although they represent a linear and fragmented High Street.

48. The study does not recommended changes to the primary or secondary frontages at this stage although it considered that the length of the frontages should be reviewed if sites within the Sittingbourne Town Centre and Milton Creek SPD have been developed. Both the eastern and western ends of the High Street could then be contracted to exclude all the frontages along West Street and East Street.

49. The study recommended extending the town centre boundary to the north to include the station complex and adjacent buildings. The recommendation would be for the railway to act as the new boundary to reflect the aspirations of the Town Centre SPD.

50. For Faversham, the shopping provision is mostly centred around three streets – West, Court and Preston Street. The shopping area is fairly compact with the historic Market Place acting as the focal point. The Tesco superstore is located to the north of the shopping area with access from Crescent Road although it is within easy walking distance of the shopping core. The Morrisons supermarket is located to the west of the shopping area (North Lane) and, although it is within easy walking distance of the shopping area, it is arguably less well integrated into the centre and the main walking route is partially severed by North Lane (although there is a Zebra crossing facility).

51. The existing primary and secondary frontages reflect the existing core shopping provision and fairly compact and historic nature of Faversham town centre. The frontages do not include the Morrisons and Tesco stores because their frontages are not contiguous with the Primary Shopping Area (PSA). The study recommended that no changes were made to the primary or secondary frontages.

52. The town centre boundary largely reflects the town centre uses and functions within Faversham. However, the study recommended that consideration be given to extending the boundary to include the Morrisons store as it performs an important retail function and is reasonably well integrated with, and within easy walking distance of, the PSA (albeit less so than the Tesco store).

53. Sheerness has a traditional linear high street running from east to west with the Broadway (running perpendicular to the High Street) also offering an element of retailing. The central focal point of the centre is at the junction of Broadway and

the High Street. The Tesco superstore is located to the west of the main shopping area and to the north of Sheerness station.

54. The primary and secondary frontages largely reflect the core retail function of the town and the study recommended no changes. If there were a need to accommodate further retailing and the PSA needs extending, the retail frontage along the High Street to the east of the Millennium and Trinity Way junction.

55. As there were no future development aspirations for the town centre and that the existing boundary incorporates the majority of the town centre functions, it was recommended that no revisions be made to the town centre boundary.

Potential Core Strategy policies

56. The study recommended that the overall approach set out in the Core Strategy should reflect the findings and recommendations of the study. In short:

- Additional convenience retail floorspace should be sought in Sittingbourne in order to address the quantitative capacity and qualitative deficiency resulting from overtrading;
- Additional comparison floorspace should be sought in Sittingbourne with a view to securing a modest improvement in the Borough's market share; and
- Further consideration should be given to providing additional convenience floorspace on the eastern side of the Isle of Sheppey, in order to improve consumer choice.

57. The study considered that development management policies should reflect any qualitative issues identified within the Centre Health Checks. For example, public realm improvements should be encouraged within the secondary areas of Sittingbourne, and in particular the Bell Centre. Policies should encourage investment into the Rushenden retail parade to improve its existing poor health and vitality. This strategy need not preclude small increases in floorspace in or close to other centres, provided that they have no significant negative impacts on the vitality and viability of the centres. The potential impact of new floorspace should be assessed before any sites are allocated or before permission is granted for new development.

CONCLUSIONS AND KEY MESSAGES

- The vitality and viability of Faversham is good, Sittingbourne is reasonably good (but with prospects for improvement), but Sheerness has signs of concern.
- Additional convenience retail floorspace should be sought in Sittingbourne in order to address the quantitative capacity and qualitative deficiency resulting from overtrading.
- Additional comparison floorspace should be sought in Sittingbourne with a view to securing a modest improvement in the Borough's market share.
- Further consideration should be given to providing additional convenience floorspace on the eastern side of the Isle of Sheppey, in order to improve

consumer choice.

- Development management policies should reflect qualitative issues identified within the Centre Health Checks. For example, public realm improvements should be encouraged within the secondary areas of Sittingbourne, and in particular the Bell Centre.
- The potential impact of new floorspace should be assessed before any sites are allocated or before permission is granted for new development.

Quantitative capacity for new retail floorspace

Convenience goods

Table 5.1
Borough wide convenience capacity

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	-5,429
2010-2020	-4,992
2010-2025	-4,492

- Once overtrading was addressed, some capacity for new floorspace arises, most notably in the area surrounding Sittingbourne, was identified.

Comparison goods

Table 5.2
Comparison capacity (static retention)

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	-2,255
2010-2020	4,622
2010-2025	14,058

- With an increased retention of 60.0%, the table below provides a summary of the level of comparison floorspace available at each test year.

Table 5.3
Comparison capacity (increased retention at 60%)

PERIOD	NET SALES FLOORSPACE (SQM)
2010-2015	7,656
2010-2020	16,863
2010-2025	29,227

Changes to the extent of town centres and boundaries

- No changes to Sittingbourne core or secondary frontages, prior to implementation of the Sittingbourne Town Centre and Milton Creek SPD, when the eastern and western ends of the High Street should be contracted to exclude all the frontages along West Street and East Street. The study recommended extending the town centre boundary to the north

to include the station complex and adjacent buildings.

- For Faversham, no changes were recommended to the primary or secondary frontages. Consideration should be given to extending the town centre boundary to include the Morrison store.
- For Sheerness, no changes were recommended to the secondary frontage. If there were a need to accommodate further retailing, the primary shopping frontage should be extended along the High Street to the east of the Millennium Way and Trinity Way junction. No revisions were recommended to the town centre boundary.

Potential Core Strategy policies

- Additional convenience retail floorspace should be sought in Sittingbourne in order to address the quantitative capacity and qualitative deficiency resulting from overtrading.
- Additional comparison floorspace should be sought in Sittingbourne with a view to securing a modest improvement in the Borough's market share.
- Further consideration should be given to providing additional convenience floorspace on the eastern side of the Isle of Sheppey, in order to improve consumer choice.

58. Development management policies should reflect any qualitative issues identified within the Centre Health Checks. For example, public realm improvements should be encouraged within the secondary areas of Sittingbourne, and in particular the Bell Centre. This strategy need not preclude small increases in floorspace in or close to other centres, provided that they have no significant negative impacts on the vitality and viability of the centres. The potential impact of new floorspace should be assessed before any sites are allocated or before permission is granted for new development.

If you have any questions concerning this topic paper, please email planningpolicy@swale.gov.uk