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Ashford Borough Council

# RETAIL NEEDS AND LEISURE ASSESSMENT

**JUNE 2015**

Carter Jonas

# Ashford Retail Needs and Leisure Assessment:

# Final Report

**June 2015**

# QA

## Ashford Retail and Leisure Needs Assessment

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# EXECUTITVE SUMMARY

## BACKGROUND

1. Carter Jonas LLP was commissioned by the Ashford Borough Council in November 2014 to update the retail evidence base (i.e. the *2003 Ashford Retail Study*) to help inform both plan-making and decision-taking across the Borough.

2. This Executive Summary sets out the study's key findings and provides out high level advice on how the local planning authority can effectively plan for, manage and promote the vitality and viability of the Borough's two main centres over the development plan period (up to 2030) in accordance with the main requirements of the NPPF (paragraph 23).

3. Our advice is based on the updated assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) and commercial leisure floorspace in Ashford Borough and its two main Town Centres (namely Ashford and Tenterden) over the development plan period, up to 2030.

4. The need assessment draws on a robust evidence base and new research, including health checks of Ashford and Tenterden Town Centres; a telephone interview survey of some 1,000 residents in Ashford Borough and a wider Study Area; and a high level consultation with key stakeholders and businesses in the Borough's main centres, as well as neighbouring authorities.

5. The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the *National Planning Policy Framework* (NPPF) and the *National Planning Practice Guidance* (NPPG), which place weight on the development of positive plan-led visions and strategies for town centres.

## SHOPPING PATTERNS & MARKET SHARE ANALYSIS

6. The Study Area and nine study zones defined for the purpose of this study (Appendix 1) provide the necessary robust framework for the telephone interview survey of some 1,000 households conducted by NEMS Market Research (Appendices 2 and 3).

7. This survey has helped to establish current shopping and leisure patterns across the Borough and wider Study Area for different types of convenience and comparison goods purchases, including special forms of trading (Appendices 4 and 5).

8. The market share analysis has identified that all the Borough's food and convenience stores are achieving a market share of 49.5% across the defined Study Area (i.e. after making an allowance for SFT). The 'retention levels' are significantly higher in the zones that comprise the Borough area (Zones 1a and 1b) at 89.1%. There is more

limited market penetration in outer zones (e.g. Zones 5 to 8) due to the competition from foodstores in the centres that serve those zones (e.g. Folkestone in Zone 7).

9. The Borough's four main out-of-centre foodstores (Asda, Sainsbury's and two Tesco Extras) are achieving a higher market share (30.1%) for the Study Area than for the two main town centres combined (10.1%). This highlights the potential to increase the market shares of the main town centres; particularly Ashford Town Centre. This could be achieved through new investment in the centre's food and convenience goods offer, subject to the availability of suitable and viable sites.

10. In terms of comparison goods, it is apparent that Ashford Town Centre is facing competition from Canterbury, Folkestone and other centres for a wide range of non-food purchases; particularly for fashion shopping. This reflects the more limited range, choice and overall quality of the town centre's comparison goods offer compared with the competing centres. For example, the market share analysis (after making an allowance for SFT) shows that all the Borough's comparison goods retailing is achieving a market share of 43.9% across the defined Study Area and 25.1% for Ashford Town Centre and 2.9% for Tenterden Town Centre. Within the study area, Folkestone is the main competitor for Ashford; achieving a comparison goods market share of 17.3%. Outside of the Study Area, Canterbury (9.7%) is the main competing shopping destination for all comparison goods purchases. It is noted that other key centres in Kent attract little to no market share of expenditure. For example, Dover only attracts 0.1% of comparison goods expenditure from the Study Area. As for convenience goods, the 'retention levels' are significantly higher in those zones that comprise the Borough area (Zones 1 to 4) at 73.1%. Within the Ashford urban area (Zones 1a and 1b), stores in the Borough retain 81.7% of comparison expenditure; reducing to 61.2% for the Tenterden area (Zone 4).

11. The market share analysis shows that despite the presence of key retail brands at Ashford Designer Outlet and proximity to Ashford Town Centre, its market share of expenditure in the Borough area and the wider Study Area is approximately 5%. This correlates with the catchment and customer profile provided by McArthur Glen, which shows that the majority of shoppers travelling to the Designer Outlet originate from outside of the Study Area. Furthermore, the market share analysis (when excluding SFT) also confirms that the market shares for Ashford Town Centre and the Designer Outlet have both improved since 2003. For example, Ashford Town Centre's market share for total comparison goods shopping increased from 24.0% to 25.1% from 2003 to 2014, which is likely attributed to the extension of County Square shopping Centre. However, it is noted that the market share for clothing and footwear for the town centre increased from 27.3% to 29.9%. While the total comparison goods market share for Ashford Designer Outlet share has remained largely the same (4.5% in 2003 against 5% for 2014), the market share for clothing and footwear has almost doubled from 8.8% in 2003 to 16.8% in 2014.

12. The challenge for the Borough's two main town centres over the development plan period therefore will be to maintain and strengthen their market shares in the face of competition from out of centre facilities (particularly for convenience expenditure), larger neighbouring centres and the internet. However, this will depend on whether there is sufficient:

- residual expenditure capacity to support modern new retail floorspace in the Borough and its main centres;
- 'physical' capacity (i.e. suitable and viable sites) in the Borough's two town centres first to accommodate any identified need in full, in accordance with the sequential approach; and
- market interest from operators, landowners and investors to deliver new and viable retail floorspace in the Borough and its main centres.

13. We address these three critical requirements in more detail below based on the key findings of the retail assessment.

## RETAIL CAPACITY FORECASTS

14. **Section 7** assessed the Borough-wide capacity for new (convenience and comparison goods) retail floorspace in the Study Area over the development plan period. The '*baseline*' capacity assessment is underpinned by robust evidence and forecasts, including:

- the latest forecast growth rates for retail expenditure, Special Forms of Trading (SFT) and floorspace 'productivity' informed by the latest *Retail Planner Briefing Note* published by Experian Business Strategies (EBS);
- the market share analysis of shopping patterns for different types of retail (convenience and comparison goods) purchases (after making an allowance for Special Forms of Trading); and
- the latest ONS-based population projections for the local authority area and wider Study Area, and the broad distribution of this population growth on a zone-by-zone basis, as agreed with Ashford Borough Council.

15. Based on the key baseline assumptions that the retail market is in '*equilibrium*' at the base year (2015) and that market shares remain constant over the study period, the table below summarises the Borough-wide capacity for new retail (convenience and comparison goods) floorspace over the plan period, up to 2030.

Table 1 **Borough-Wide Capacity Forecasts: Assuming 'Equilibrium' at 2015 & Constant Market Shares**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **CONVENIENCE GOODS:** | | | | |
| Residual Expenditure (£m): | £0 | -£28.0 | -£6.6 | £13.7 |
| **Floorspace Capacity ($m^2$ net) [(1)]:** | **-** | -2,315 | -544 | 1,127 |
| **COMPARISON GOODS:** | | | | |
| Residual Expenditure (£m): | £0 | -£4.1 | £58.5 | £142.1 |
| **Floorspace Capacity ($m^2$ net):** | **-** | **-676** | **8,631** | **18,807** |

Source: Tables 11, Appendices 7 & 8 (Steps 10 & 11)

Notes: [(1)] The capacity identified is for new superstore-format floorspace trading at a higher average sales density than for supermarkets (e.g. Co-Op, Budgens, etc.) and deep discounters (e.g. Lidl and Aldi).

16. The headline forecasts show that for:

- **Convenience goods** - there is no Borough-wide capacity for new (superstore format) retail floorspace until the end of the study period 2030 (1,127 $m^2$ net), as any expenditure growth will largely be taken up by commitments including planned convenience floorspace associated with the new communities at Cheeseman's Green and Chilmington Green.
- **Comparison goods** - there is capacity for 8,631 $m^2$ net of new floorspace by 2025, and this is forecast to increase to 18,807 $m^2$ by 2030. Forecast capacity reduces to 5,588 $m^2$ (net) in 2025 and 15,764 $m^2$ (net) in 2030 after taking account of the potential to reoccupy vacant prime retail floorspace.

17. The Borough-wide capacity forecasts have then been disaggregated for Ashford and Tenterden Town Centres, the combined village centres and all other shopping locations in the Borough (principally the out-of-centre stores and retail warehouses) to help identify and inform the likely future strategic allocation of new retail floorspace over the development plan period. The results are summarised in the table below.

Table 2 **Summary of Forecast Convenience and Comparison Floorspace Capacity ($m^2$ net): Assuming 'Equilibrium' at 2014 & Constant Market Shares**

| | 2020 | 2025 | 2030 |
|---|---|---|---|
| **CONVENIENCE FLOORSPACE** | | | |
| Ashford Town Centre ($m^2$ net) : | 106 | 200 | 289 |
| Tenterden Town Centre ($m^2$ net) : | -455 | -196 | 50 |
| Local/ Village Centres ($m^2$ net) : | 119 | 225 | 324 |
| Rest of Borough ($m^2$ net) : | -2,085 | -774 | 464 |
| **TOTAL BOROUGH ($m^2$ net) :** | **-2,315** | **-544** | **1,127** |

| | 2020 | 2025 | 2030 |
|---|---|---|---|
| **COMPARISON FLOORSPACE** | | | |
| Ashford Town Centre ($m^2$ net) : | 2,329 | 7,060 | 12,213 |
| Tenterden Town Centre ($m^2$ net) : | 9 | 541 | 1,122 |
| Local/ Village Centres ($m^2$ net) : | 93 | 259 | 440 |
| Rest of Borough ($m^2$ net) : | -3,107 | 771 | 5,032 |
| **TOTAL BOROUGH ($m^2$ net) :** | **-676** | **8,631** | **18,807** |

Source: Tables 12-14, Appendix 8

18. The table shows that Ashford Town Centre has forecast capacity for up to 12,213$m^2$ net of new comparison goods floorspace by 2030. However, if an allowance is made for current vacant prime retail floorspace in the town centre (e.g. County Square) the total forecast comparison capacity would reduce to 4,017 $m^2$ net for 2025 and 9,170 $m^2$ net.

19. Ashford Town Centre has more limited capacity for new convenience goods retailing of 289 $m^2$ net. Tenterden Town Centre has a lower forecast capacity for new comparison goods floorspace of 1,122$m^2$ net by 2030 and no capacity for convenience goods floorspace over the plan period.

20. In general terms the forecast capacity reflects the relative scale and attraction of each centre's retail offer, and their different roles in the Borough's existing network and hierarchy of centres. There is limited forecast capacity for new floorspace in the local/ village centres, which reflects the lower market share for expenditure achieved by smaller centres and their role and function in the Borough's retail hierarchy.

21. The table also shows that the Borough's other shopping locations (including all edge and out of centre stores and retail warehouses) are generating a 'residual' capacity for up to 5,032 $m^2$ net of new comparison goods floorspace by 2030, and 464 $m^2$ net of new convenience goods floorspace. However, any floorspace capacity generated by existing edge and out of centre retailing should be directed to town centres first in accordance with local and national planning policy objectives. Where proposals for retail are promoted at non-town centre sites then consideration should be given to the impact of these proposals on existing centres in the Borough as well as centres in neighbouring local authorities.

22. It is important to restate that retail capacity forecasts beyond 5 years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending levels, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current Experian forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term.

23. The leisure needs ('gap') assessment has also identified the potential to support new cinema screens in the Borough, as well as new food and beverage outlets (A3 to A5) and fitness/ health facilities. The potential to deliver new commercial leisure facilities is largely market driven; particularly for new cinema provision. However, national trends show an emergence of proposals for new cinemas in town centre locations, and this is underlined in the proposals for a multi-screen cinema at Elwick Place in Ashford Town Centre. This has also resulted in the growth of supporting food and beverage outlets.

## MEETING NEEDS IN THE BOROUGH'S TOWN CENTRES

24. The following provides a review of the relative health, role and function of the Borough's two town centres, and their potential to accommodate some and/or all of the identified need over the short, medium and long term. This is based on our understanding of the potential availability and suitability of identified sites in Ashford and Tenterden; and the market interest/demand from operators, landowners and investors to deliver new and viable retail floorspace in the Borough and its main centres.

25. The review of the performance of the Borough's two town centres in retail terms has been informed by the findings of the health checks, centre audits and household survey. It has also taken into account the current policy framework and strategic visions for each centre, including the emerging Local and Neighbourhood Plans, as well as the latest information on existing, proposed and emerging new retail-led development and investment in the two centres.

### Ashford Town Centre

26. Ashford serves as the Borough's principle shopping and administrative centre with 328 retail, leisure and service outlets. The centre's main retail offer is anchored by County Square shopping centre and is also focussed on the High Street. Other shopping areas include Bank Street and North Street, and the purpose-built Park Mall shopping centre.

27. The following provides a brief summary of Ashford Town Centre's overall vitality and viability based on a number of the key retail performance indicators (KPIs) assessed in Section 5 of the report:

- Comparison retail provision is in line with the UK average for town centres, with Debenhams in County Square serving as a key anchor for the town centre.
- There is an under-provision of food stores in the town centre and this is reflected by its low market share for convenience expenditure.
- The number of vacant outlets on the High Street has increased from 28 in 2012 to 32 at present. For the wider town centre the vacancy rate (16%) is

currently above the (Experian Goad) national average figure of 11%. The greatest concentration of vacant units is within the two shopping centres.

- County Square represents a key economic asset for the town centre although it has drawn shoppers from peripheral parts of High Street and Park Mall. The latter is now under-utilised with a high proportion of vacancies. This trend is likely to continue should the proposals for Elwick Place be delivered.
- The latest retail requirements for the town centre are predominantly from larger format 'bulky' goods retailers rather than operators seeking town centre space (e.g. fashion and footwear retailers).
- There are a number of commercial leisure operators with reported requirements for Ashford, including David Lloyd Leisure and a number of food and beverage operators. The emerging proposals for Elwick Place also include a cinema as anchor to the scheme.
- Prime Zone A rents in the town centre have reportedly fallen considerably from a pre-recession peak. County Square shopping centre is achieving higher Prime Zone A rents than the High Street shops, of between £490 per $m^2$ and £590 per $m^2$.
- Respondents to the household survey highlighted the good range of shops, its proximity to where they live, attractive environment and compactness of the town centre as what they liked the most about Ashford.
- When asked what improvements to the centre would make them visit more often, respondents identified the need for more national multiples/ high street retailers, more and better parking (including free parking) and a reduction in the number of vacant units.

28. The market share analysis shows that Ashford Town Centre retains a quarter (25.1%) of comparison retail expenditure in the Study Area, increasing to almost half (44.9%) of expenditure in the Borough area.

29. As described above, there is forecast capacity for 106 $m^2$ net of new convenience goods floorspace in Ashford Town Centre by 2025 and 7,060 $m^2$ net of new comparison goods retailing. The forecast capacity increases to 289 $m^2$ and 12,213 $m^2$ respectively by 2030. However, when considering the potential to reoccupy vacant prime retail floorspace in the town centre (e.g. County Square) then we estimate that forecast comparison retail floorspace would reduce to 4,017 $m^2$ net for 2025 and 9,170 $m^2$ net. In accordance with local and national planning policy it is important that new retail and leisure development is focused in Ashford Town Centre first to help maintain and strengthen its role in the network and hierarchy of centres. In this case we consider that the majority, if not all of the forecast capacity could be met by the various development opportunity sites identified by the Ashford Town Centre AAP (2010),

including the Park Mall and Vicarage Lane car park sites. However this would need to be subject to more detailed assessments of market demand and commercial viability.

30. If permission is granted for the circa 6,665 $m^2$ net extension to Ashford Designer Outlet, this will account for the majority of the forecast comparison goods floorspace capacity identified for the 'rest of the Borough' over the plan period (i.e. 5,032 $m^2$ net). We do not therefore consider at this stage that there is a requirement for the Council to identify other town centre sites to accommodate the forecast capacity for new retail floorspace, or failing that edge and/or out-of-centre sites that are well connected to the primary shopping area.

31. The emerging proposals for Elwick Place, to include a new multi-screen cinema and food and beverage outlets, will also help to strengthen the town's role and attraction as a leisure destination and boost both its daytime and evening economies. Elwick Place will help to meet the forecast need for a new cinema in Ashford, and will also accommodate some of the identified need for new, higher quality restaurants and cafés. This scheme will also help to generate increased linked trips, footfall and expenditure to the benefit of the town's overall vitality and viability. It is therefore vitally important that the food and beverage uses proposed as part of the Ashford Designer Outlet extension do not damage the planning, development and marketing of Elwick Place to a range of café and restaurant operators. It should be noted that the Council will need to establish the impact of proposed schemes at non-town centre sites on the vitality and viability of Ashford and Tenterden Town Centres and centres in neighbouring local authorities.

### Tenterden Town Centre

32. Tenterden is located to the west of the Borough and is characterised by an attractive historic environment and rural catchment. Its shopping, leisure and service provision is focused around its historic linear High Street, which has approximately 72 retail, leisure and service outlets. Is offer is distinctly different to Ashford and comprises a good mix of independent and specialist businesses, trading alongside some high street brands. The good choice of high quality specialist shops in the town reflects Tenterden's relatively affluent catchment population and its important role as a tourist and visitor destination.

33. Unlike Ashford Town Centre, Tenterden benefits from two foodstores: the Waitrose store located on Sayers Lane, off the south side of the High Street, within the primary shopping area; and the Tesco at Highbury Works, which is in an edge-of-centre location albeit within walking distance of the town centre. Both stores help to underpin Tenterden's overall vitality and viability, by generating linked trips, footfall and expenditure to other shops and businesses in the town centre. The important role,

attraction and trading performance of these two key anchor stores should therefore be maintained.

34. The following provides a brief summary of the centre's overall vitality and viability based on the key retail performance indicators (KPIs) identified in Section 6 of this report:

- The centre performs strongly in its role as a rural market town. Its relative isolation from Ashford Town Centre allows the centre to maintain a strong local catchment, particularly for convenience shopping.
- The focus on niche retail and the visitor/tourist market also helps to support the centre and maintain its attractiveness as a place to visit and shop.
- The centre has a strong provision of comparison goods outlets that is considerably higher than the national (Experian Goad) average.
- There is a slight under-representation of service and leisure operators in the town centre.
- The centre's food and convenience offer is anchored by Waitrose and Tesco, and supplemented by smaller independent stores in the town.
- The town's vacancy level (c.5%) is less than half the national (Experian Goad) average of 11.5%. Vacancy levels have not changed since 2012.
- The highest concentrations of vacant units recorded by CJ were on the High Street. However, discussions with agents suggest that the existing strong demand for units means that vacancies will be short term.
- There were three recorded requirements from retailers for representation in the town centre in December 2014, two of which represent in-centre type retailers.
- Prime Zone A rents are considered by local agents to be buoyant despite a fall from peak rental levels pre-recession (£700 per $m^2$) to the current level of between £592 per $m^2$ and £667 per $m^2$.
- Respondents to the household survey like the fact that Tenterden has good foodstore provision and a good range of shops and services. Respondents also particularly like the town centre's shopping and pedestrian environments with the centre perceived as clean and safe.
- When asked what improvements to the centre would make them visit more often, respondents identified the need for better access by public transport, better leisure and entertainment facilities, security and parking.

35. The planned extension to the existing Tesco store will help to strengthen the town's food and convenience retail offer and maintain its market share within its primary catchment (i.e. 58.1% for Zone 4). As stated previously it is important that the role,

function and trading performance of both the Tesco and Waitrose stores are not harmed by new out-of-centre proposals, as this could result in a significant adverse impact on the town centre's overall vitality and viability.

36. As described above, there is limited or no forecast capacity for new convenience or comparison goods floorspace in Tenterden Town Centre over the next five years, to 2020. The forecast capacity increases thereafter to 1,122 $m^2$ net of new comparison goods floorspace and 447 $m^2$ net of new convenience goods retailing by 2030. Given Tenterden's historic and attractive environment we are not aware of any specific development sites that could currently accommodate this need in a comprehensive manner. Notwithstanding this, it may be possible for this new floorspace to be provided through small-scale incremental development including, for example, the reconfiguration of existing shop units and the possible extension of Waitrose. However, it is important that any new development does not harm Tenterden's unique character and attraction.

**POLICY RECOMMENDATIONS**

37. To help ensure the vitality of Ashford and Tenterden Town Centres we have also reviewed the current primary shopping area (PSA) and recommendations for primary shopping frontages (PSFs) and secondary shopping frontages (SSFs) within each centre.

38. For Ashford Town Centre, we recommend that the PSF on High Street is revised to redefine frontages along lower High Street (between North Street and Wellesley Road) as SSF. This will allow greater flexibly of uses and encourage the reoccupation of vacant units in this part of the town centre. In addition, we recommend extending the PSF to include internal ground floor frontages within County Square shopping centre and the external frontage of Debenhams on Elwick Road/ Bank Street. The SSFs should include all other frontages within the PSA.

39. For Tenterden Town Centre we consider that the current PSF definitions set out in Policy TRS15 of the 2010 Tenterden and Rural Sites DPD are still appropriate based on the existing scale, mix and quality of uses on the High Street.

40. In assessing future retail proposals, it is recommended that the Council require proposals of 500 $m^2$ (gross) and more to demonstrate that the scheme will not impact on the vitality and viability of Ashford and Tenterden Town Centre, as well the Borough's network of smaller centres.

# 1.0 INTRODUCTION

1.1 Carter Jonas LLP was commissioned by the Ashford Borough Council in November 2014 to update the retail evidence base (i.e. the *2003 Ashford Retail Study*) to help inform both plan-making and decision-taking across the Borough.

1.2 In terms of the scope of work, the Council's Brief set out the following main requirements:

i. A refresh of the household telephone survey to identify market shares for convenience and comparison shopping habits in the Borough, and how these may have changed over time.

ii. An assessment of the potential residual retail and leisure expenditure and floorspace capacity available for new retailing up to 2030, broken down into five year periods.

iii. A high level update of the health checks of the main town centres in the Borough; namely Ashford and Tenterden.

iv. Advice on the strengths and weaknesses of each centre and their capacity to accommodate additional retail and leisure growth, including a review of the proposals to extend Ashford Designer Outlet.

v. Advice on the level and type of retail and leisure development which would be appropriate for Ashford Borough over the development plan period, taking into account national and local economic trends.

vi. An assessment of the interrelationship between Ashford Town Centre and Ashford Designer Outlet.

1.3 The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the National Planning Practice Guidance (NPPG), published in March 2014, which still places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. The sequential and impact 'tests' are also key to both plan-making and decision-taking at the local level.

1.4 For the purpose of this study the assessment of the need (or 'capacity') for new retail (convenience and comparison goods) floorspace has been carried out at the strategic Borough-wide level to help inform the likely scale, type, location and phasing of new retail development over the short (0-5 years), medium (6-10 years) and long term (11+ years).

1.5 The Study Area defined for the purpose of this retail assessment principally covers Ashford Borough, but also a wider area incorporating neighbouring local planning

authorities. This area has been further sub-divided into nine study zones that broadly reflect the prime catchments of the Borough's two main centres; Ashford and Tenterden (see **Appendix 1**). The defined Study Area and zones provide the framework for the new telephone interview survey of some 1,000 households conducted by *NEMS Market Research* (NEMS) in late November and early December 2014. This survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the Study Area. In turn, this has informed the high level health check assessments for the two town centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace. The survey approach adopted by NEMS is explained in some detail in **Appendix 2**, along with the questionnaire. The full (weighted) survey results are set out in **Appendix 3**.

1.6 For ease of reference this report is structured as follows:

- **Section 2** reviews the national, regional and local planning policy context material to retail planning and town centres.
- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4** sets out the results of the market share analysis for convenience and comparison goods retailing across the Study Area and nine zones as derived from the results of the household telephone interview survey. The market share tabulations for convenience and comparison goods are set out in **Appendix 4** and **Appendix 5** respectively.
- **Sections 5-6** provide high-level updates of the town centre health checks for the Borough's town main town centres of Ashford and Tenterden, as well as a brief review of the trading characteristics of Ashford Designer Outlet Centre. These assessments draw on recent research, including the latest town centre audits for Ashford and Tenterden (**Appendix 6**), supplemented by site visits and audits.
- **Section 7** describes the key inputs and outputs of the retail (economic) capacity assessment for comparison and convenience goods retailing for the Borough and its main centres based on our in-house CREAT$^{e}$ (excel spreadsheet model). The full tabulations are set out in **Appendix 7** for convenience goods and **Appendix 8** for comparison goods.
- **Section 8** sets out the findings of the commercial leisure 'gap' and need assessment for the main leisure uses identified, including food and beverage, cinema, gym and hotel provision. Existing provision is set out geographically in **Appendix 9** along with summary assessment tables.

- **Section 9** assesses the need to review the definition of the primary shopping area for Ashford and Tenterden Town Centres in light of the findings of the need assessment, and recommendation on primary and secondary shopping frontages. Advice is also provided on whether a local impact threshold should be set in accordance with the NPPF (para 26).
- Finally, **Section 10** draws together the key findings of the qualitative and quantitative need assessments for retail and commercial leisure. Where a need for new floorspace and/or uses is identified over the development plan period, high level advice is provided on where this need should be directed in accordance with the main aims of national and local plan policy. Advice is also provided on the need to review the definitions of primary shopping areas in light of the findings of the need assessment, and whether an local impact threshold should be set in accordance with the NPPF (para 26).

1.7 Finally, it is important to state at the outset that, in our experience, capacity forecasts beyond a five year time period should be interpreted with caution as they are subject to increasing margins of error. We therefore advise the Council that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be constantly monitored and updated to take into account any significant new retail development and changes in the retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail (such as, for example, the growth in internet shopping) and commercial leisure sectors.

# 2.0 PLANNING POLICY CONTEXT

2.1 This section briefly reviews the relevant national and local development plan planning policy pertaining to retail and town centre uses.

## NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans[1] and Neighbourhood Plans[2].

2.3 At the heart of the NPPF is a **presumption in favour of sustainable development**[3], which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level.

2.4 For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *"…it is clear that development which is sustainable can be approved without delay"*.

2.5 The NPPF (paragraph 17) also sets out twelve **core planning principles** that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

2.6 The Framework (paragraph 150) emphasises that **Local Plans** are *"…the key to delivering sustainable development that reflects the vision and aspirations of local communities"*. They should be *"aspirational but realistic"* and should set out the

[1] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[2] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[3] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

opportunities for development and clear policies on *"…what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

2.7 The NPPF (paragraph 156) requires **strategic priorities** for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.8 In terms of the **evidence-based approach to planning**, the Framework states LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to:

- assess the needs for land or floorspace for economic development, including for retail and leisure development;
- examine the role and function of town centres and the relationship between them;
- assess the capacity of existing centres to accommodate new town centre development; and
- identify locations of deprivation which may benefit from planned remedial action.

2.9 The NPPF is clear that pursuing sustainable development requires *"…careful attention to viability and costs in plan-making and decision-taking"* (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified

in the plan should *"…not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened"* (paragraph 173).

2.10 The Framework (paragraphs 18-149) sets out thirteen key 'principles' for **delivering sustainable development**, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment.

2.11 In terms of '**ensuring the vitality of town centres'** the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[4] environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas[5], based on a clear definition of primary and secondary frontages[6] in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- ensure that the needs for retail, leisure, office and other main town centre uses are *"met in full"* and *"not compromised by limited site availability"*. Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;

[4] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[5] Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

[6] The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.12 When assessing and determining applications for main town centre uses[7] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a **sequential test**[8], which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, *"…preference should be given to accessible sites that are well connected to the town centre"* (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an **impact assessment** if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m$^2$). The NPPF (paragraph 26) states that this should *"include"* assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, *"…the impact should also be assessed up to ten years from the time the application is made"*.

[7] NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

[8] This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

2.13 The NPPF (paragraph 27) 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"*.

2.14 As previously stated in Section 1, this study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014. The NPPG has streamlined and replaced the advice previously set out in PPS4 *Practice Guidance on Need, Impact and the Sequential Approach*. The revised NPPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the NPPG (para 003) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a "*three-five year period*" but should "*also take the lifetime of the Local Plan into account and be regularly reviewed*".

## LOCAL PLANNING POLICY CONTEXT

2.15 The existing town centre strategy for the Borough is set out in the *2008 Core Strategy* and the supporting *Ashford Town Centre Area Action Plan* (2010). Ashford Core Strategy and supporting development plan documents are currently in the process of being reviewed and replaced by a new Local Plan, which will guide development and growth in the Borough up to 2030. This study informs the review of local policy.

2.16 The Core Strategy covers the period to 2021. Over this period, Ashford Town Centre is anticipated to be the focus of economic growth in the Borough; maximising the benefits provided by the Channel Tunnel Rail Link to London and enhancing the commercial image of the area. Larger local service centres like Tenterden will also be supported as economic growth areas.

2.17 ***Policy CS3: Ashford Town Centre*** proposes development within the town centre as a priority. This town centre growth will support over 8,000 additional jobs in the local economy, in addition to 2,500 new homes and an enhanced office, retail and leisure offer. The creation of over 93,000 $m^2$ of new office space – which increased to 94,000 $m^2$ in the Core Strategy – is supported in the *2008 Employment Land Review*, in order to accommodate growth targets.

2.18 The *2010 Ashford Town Centre Area Action Plan* (TCAAP) identified the need for major expansion of the town centre to the south in order to meet growing demand, but also growth elsewhere to prevent too strong a shift in retail activity towards the south causing decline in some areas. Developing a *"substantial leisure offer"* is also considered to be important. The attractiveness of Ashford as an office location is linked to the 'sense of place' in Ashford, not just the medieval core but also public realm, retail and leisure enhancements.

2.19 However the proposed development and growth of Ashford Town Centre has been somewhat hampered by the impact of the economic downturn. As a result much of the planned redevelopment has yet to be delivered.

2.20 The Council has identified eight priority projects that are key to meeting the Council's aspirations for the Borough, of which four relate to the town centre, including:

- **Elwick Place**: This large town centre site is currently vacant, and has been identified in the 2010 TCAAP as suitable for mixed use development. Current proposals including up to 155 new homes, a multi-screen cinema and 3,200 $m^2$ of new commercial floorspace, which accommodate new food and beverage operators.
- **Commercial Quarter**: This will be an office-led development, including up to 150 new homes, 590,000 $m^2$ of new office space and 26,000 $m^2$ of retail and supporting leisure uses.
- **Ashford International College Campus**: In 2011 a scheme was approved for the demolition of existing buildings on a site opposite Ashford International rail station in order to make way for a new campus for Ashford College.
- **Jasmin Vardimon International Dance Academy**: Plans are in place to create a new performance space, studios and related facilities in the old Stour centre building.

2.21 ***Policy CS6: The Rural Settlement Hierarchy*** proposes that the focus for development outside of Ashford will be in Tenterden (500 homes to 2021). This is supported by the *Tenterden and Rural Sites SPD* (2010), which sets out the primary shopping areas and restricts the total non-A1 uses along these frontages to 35% in order to protect the vitality and viability of the shopping area.

2.22 The *Focus 2013-15 Corporate Plan* for Ashford sets out key achievements for the Borough in recent years, including: the delivery of 900 homes; a new John Lewis Home Store; and the relocation of the Jasmin Vardimon International Dance Academy to Ashford.

2.23 Plans have been implemented as part of the designation of Ashford Town Centre as a 'Portas Pilot' town. The Town Team has implemented a number of strategies using the Portas Pilot funding and S106 funds gathered to benefit the vitality and viability of the town centre. Projects include creating a new innovative town centre website that provides click and collect for all retailers, a new farmers market, creation of a new Town Centre Action Team to enhance the town centre environment and running a pop up shop to allow start up retail businesses to test the high street.

**SUMMARY**

2.24 In summary, the underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations *"first"* in accordance with the sequential approach. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping and competition from major out-of-centre developments (discussed further **in Section 3**).

# 3.0 NATIONAL RETAIL TRENDS & TOWN CENTRE FUTURES

3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

## RETAIL TRENDS

### *Retail Expenditure Growth*

3.2 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further.

3.3 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest *Retail Planner Briefing Note 12.1* (October 2014).

Table 3.1 **Actual and Forecast Annual Retail Expenditure Growth**

| Volume Growth per head (%): | ----------ACTUAL GROWTH---------- | | | | | | FORECASTS | | TRENDS | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015-25 | 1973-2013 | 1993-2013 |
| Total Retail Spend | 1.7 | -3.1 | 0.3 | -0.8 | 1.2 | 2.3 | 3.3 | 2.4 | 2.7 | 3.6 |
| Convenience Goods: | -4.9 | -5.0 | -0.8 | -2.7 | -0.5 | -1.3 | -0.5 | 0.6 | 0.2 | -0.2 |
| Comparison Goods: | 4.7 | -2.4 | 0.9 | 0.5 | 2.6 | 4.6 | 5.6 | 3.3 | 4.5 | 5.9 |

Source: Experian Retail Planner Briefing Note 12.1 (October 2014); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1973-2013 (the '*ultra long-term'* trend) and for 1993-2013 (the '*medium-term'* trend).

3.4 Although there has been negative annual growth in convenience goods expenditure per capita levels since 2008, the forecasts for 2015-25 show positive growth of +0.6% per

annum on average. This is above previous historic long term trends of around +0.2% per annum.

3.5 For comparison goods Experian forecast that annual growth rates are recovering from a low of -2.4% in 2009, to +4.6% in 2013 and a stronger annual growth of +5.6% for 2014. Experian forecast that growth will average +3.3% per annum for the period 2015-2025, which is well below historic trends of between 4.5% and 5.9% per annum.

3.6 In summary there are positive signs of improvement in the UK economy and consumer and business confidence in 2014. Notwithstanding this, it is clear that the retail sector is highly vulnerable to changes in the UK economy (and how it responds in the future to changes in the Eurozone and global economies) and the fact that the forecast growth in retail sales volumes will be much lower and slower than in recent history.

***Special Forms of Trading and Internet Shopping***

3.7 *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).

3.8 Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2014) value of internet sales is £37.2bn (current prices) and other (non-internet) SFT sales stand at approximately £8.3bn. This results in total SFT sales of £45.5bn in 2013, which represents a circa 165% increase from £17.1bn recorded in 2006. Overall the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 13% in 2014. This significant growth has been fuelled by internet shopping, which had increased its share of total retail sales from 4.7% in 2008 to 10.6% in mid-2014.

3.9 Up to now, the 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 (the most recent examples being HMV and Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear.

3.10 The table below sets out Experian's latest forecasts of the growth in the total market share of SFT between 2014 and 2031, based on retail spending growth assumptions and predictions as to the future take-up and expansion of internet shopping[9].

[9] Please note that although no official data is available for convenience and comparison goods, EBS have provided their own market share estimates.

Table 3.2 **The forecast growth in SFT's market share of total retail sales**

| | 2014 | 2019 | 2024 | 2031 |
|---|---|---|---|---|
| TOTAL: | 13.0% | 17.8% | 19.6% | 20.1% |
| Comparison | 15.6% | 20.4% | 21.3% | 20.7% |
| Convenience | 8.5% | 12.8% | 15.9% | 18.5% |

Source: Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

3.11 EBS forecast that non-store retailing will continue to grow rapidly over the short to medium term, outpacing traditional forms of spending. They predict that this growth will be sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping, but will slow after 2020.

3.12 However such forecasts need to be treated with caution, as according to Experian 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 from '*virtual*' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 **Adjusted SFT's market shares**

| | 2014 | 2019 | 2024 | 2030 |
|---|---|---|---|---|
| TOTAL: | 8.4% | 11.4% | 12.5% | 12.8% |
| Comparison | 11.7% | 15.3% | 16.0% | 15.5% |
| Convenience | 2.6% | 3.8% | 4.7% | 5.6% |

Source: Appendix 3 of Experian Retail Planner Briefing Note 12.1 (October 2014)

3.13 Although the growth in online sales has, and will inevitably continue to impact on the need for traditional shops, some commentators believe that the development of multi-channelling as part of retailers' business models will result in internet shopping actually driving demand for 'bricks-and-mortar' stores. This may be due to the need for '*click-and-collect*' facilities in easily accessible locations (for example, on the high street, in existing out-of-centre stores or at important transport nodes), or for '*showrooms*' where customers can view and test products in store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support demand for retail space over time.

***Floorspace 'Productivity' Growth***

3.14 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as rents, rates and service charges) to help maintain their profitability and viability. It is standard practice for retail planning assessments to make an allowance for the year-

on-year growth in the average sales densities of existing comparison and convenience goods retail floorspace.

3.15 However there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. However following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

3.16 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for non-store retailing.

Table 3.4 **Productivity Growth in Retail Floorspace**

| | 2013 | 2014 | 2015 | 2016 | 2017-21 | 2022-35 |
|---|---|---|---|---|---|---|
| Convenience | -1.8 | -1.4 | -0.3 | -0.4 | -0.2 | +0.1 |
| Comparison | +4.3 | +5.3 | +3.8 | +2.3 | +2.0 | +2.2 |

Source: Figures 4a and 4b (Addendum), Experian *Retail Planner Briefing Note 1.1* (October 2014)

3.17 The forecasts show that the scope for sales density growth is very limited for convenience goods. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of approximately +2.2% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century[10].

## RETAIL DEVELOPMENT PIPELINE

3.18 The retail development pipeline slowed dramatically during the economic downturn compared with the shopping centre 'boom' experienced in the ten year period up to 2007. One of the key impacts has been to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

3.19 The latest *Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) in 2013 confirms that the quantum of completed

[10] Please note that the floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in Section 7 of this report.

new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m$^2$ in 2009, 232,000m$^2$ in 2010 and 280,000m$^2$ in 2011, no new floorspace opened in 2012. The quantum of retail development in the pipeline is also continuing to decline, with shopping centre proposal levels falling by 37% from a peak of 30 million m$^2$ in March 2009 to 19 million m$^2$ in June 2013 (CBRE data[11]). This trend is anticipated to continue over the short term at least to 2015/16.

3.20 Notwithstanding this, the BCSC research also identified the first significant signs of new development activity in 2013 following the opening of circa 140,000m$^2$ of new retail floorspace (including Trinity Leeds). This is set to continue with a number of major schemes opening in 2014 and 2015, including Grand Central in Birmingham and Old Market in Hereford. There are also positive signs that new investment is returning to the shopping centre market from UK-based and international funds seeking assets in prime and secondary locations that offer the potential for growth.

3.21 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 100' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, or require a new approach if they are to secure new shopping centre development in the future. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "*golden decade*" of shopping centre development between 1997 and 2007.

## RETAILER REQUIREMENTS

3.22 The economic downturn, in combination with other trends (such as changes in customer requirements, planning legislation and the growth in internet shopping), has created a need for retailers to review and rapidly adapt their business strategies, requirements and store formats. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm. The following highlights some of the key trends that are occurring in the convenience and comparison goods retail sectors.

[11] CBRE (June 2013) UK Shopping Centres in the Pipeline

***Convenience Goods Retailing***

3.23 The changes in the food and grocery sector over the last decade illustrate the dynamic changes in the retail industry. Some of the key trends include:

- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further, including for example the Tesco 'Express', Sainsbury's 'Local' and 'Little Waitrose' formats.
- The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response, this has resulted in the expansion of own-brand 'value' ranges by the established grocers.
- An increase in the non-food sale areas of larger superstores over the last decade, including the development of own-label clothing. In some of the stores operated by Tesco (i.e. the 'Extra' format) and Asda, for example, a significant proportion of sales area (over 50%) is often set aside for non-food retailing.
- The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping.

3.24 Over the last 12-18 months, however, the focus for the main foodstore operators has shifted to opening more convenience store formats, and growing their market shares of online sales. At the same time applications for large store formats have slowed significantly. Furthermore, Tesco and Morrisons have recently announced that they intend to dispose of some of their under-performing superstores, and Tesco is not now going to develop some 49 foodstores with extant planning permissions, including sites in Basingstoke and Dartford. This will inevitably have implications for the scale and type of new floorspace required by foodstore operators across the UK.

***Comparison Goods Retailing***

3.25 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, Bank, Austin Reed, etc.).

3.26 Within town centres, some traditional high street multiple operators are also changing their formats and requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively looking for larger format new-build or existing stores in out-of-centre locations to accommodate new retail formats (such as John Lewis at Home) and display their full range of products. These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

3.27 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.28 The out-of-centre sector has also not been immune to change. Since 2007 there has been a notable downturn in the demand from traditional 'bulky goods' retailers for new space. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000m$^2$ gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Other 'bulky goods' operators have simply gone out of business (such as Focus DIY). Notwithstanding this, out-of-centre retailing still accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example recent research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres[12].

## TOWN CENTRE FUTURES

3.29 A number of high profile research reports have been commissioned over recent years that set out recommendations and guidance on how to maintain and enhance the future vitality and viability of the UK's town centres. These include:

[12] http://www.acs.org.uk/en/research/planning.cfm referenced in Why Our High Streets Still Matter: A Think Piece by Mary Portas, 30th May 2014.

- **The Portas Review** (2011) reports on the findings and recommendations of research led by Mary Portas into the future of the High Streets. The report presented 28 key recommendations for government, local authorities and businesses to help high streets respond to the current challenges facing them and to prevent further decline.
- **The Grimsey Review** (2013) addresses the continuing decline of many local high streets. The review highlights the dramatic impact that recent technological changes have had on consumer behaviour and the knock-on effects for high streets. It suggests that the Portas recommendations failed to adequately account for this.
- **The Distressed Town Centre Property Taskforce** (DTCP) report (November 2013) was produced by an industry-led cross sector taskforce, assembled in response to the Portas Review. The report specifically focuses on the role that property ownership, investment, development and occupation can have on town centre viability, and provides recommendations on how the property sector can act to leverage in investment for town centres and support their ongoing viability.

3.30 The table below provides an overview of some of the common themes and recommendations identified by the different research in support of town centre revitalisation, including the Portas Review.

| Strategy | Description |
|---|---|
| Reforming the management of town centres | **Improving the ways in which town centres are managed** was a key recommendation made by the Portas Review. In response, the Government has set up 27 'Portas Pilots' and 333 Town Teams, which bring together local councils, retailers and businesses to try out new ideas to drive their local economy. Strategies to deliver change are formulated in recognition of the particular strengths of each local area. It may be too early in the process to comment on the success of these, however a recent thought piece published by Portas (May 2014) has suggested that progress has been slow. There is also **increasing financial support for Business Improvement Districts (BIDs),** which enable local businesses to take on responsibility for realising improvements in their local area. The Government has launched a BID Loan Fund to help those wishing to set up a BID in their area. **Support for local (street) markets** is also increasing, as a way to increase footfall and enhance the vibrancy of local centres. This was also a key recommendation in the Portas Review. |
| Making use of the planning system to protect and enhance town centres | **The planning system is being used** in various ways to enhance and protect local centres where possible. This includes maintaining use of **'town centres first'** policies (as set out in the NPPF) in order to protect town centres from unnecessary competition from out-of-town developments. Where BIDs are in place, the improved planning conditions may also facilitate development. More stringent protection has been advocated by some sources. The Portas Review included a recommendation to introduce 'exceptional sign off' for all new out-of-centre retail development in order to protect existing centres. However, this was one of the few Portas recommendations that was not taken on by the Government. **LPAs are also being encouraged to make use of CPOs** in order to address issues of fragmented ownership and to facilitate |

| Strategy | Description |
|---|---|
| | comprehensive development across a centre. |
| Engaging communities | **Encouraging communities to support their local high streets** and town centres is essential and was a key recommendation in the Portas Review. Recent strategies to promote community participation in the development of local centres have included government support for communities wishing to take on the responsibility for ownership and management of assets of community value, such as their local pub or shop. A £19 million fund has been set up and more than 300 assets have already been listed under the Community Right to Bid. |
| Leveraging investment and funding | There are a number of **new sources of public sector investment** now available to facilitate improvements to local centres. These include £3.6m of funding via the Town Teams, a High Street Innovation Fund worth £10m and High Street renewal awards to date worth £1m. The DTCP suggestion that a workable **Tax Increment Finance (TIF)** model be put in place has since been actioned by the government. This will allow LPAs to raise finance to fund development and infrastructure based on the projected future increase in business rates resulting from investment. The DTCP report has also recommended **greater engagement between LPAs and the private sector** in order to tackle the challenges faced by town centres proactively. They support the use of joint venture partnerships between the public and private sector to facilitate development. A recent report by Peter Brett[13] suggested a new method that would involve the selection of a Property Company Partner (possibly private sector) who will then fund future investment in the centre. The Property Company would be assisted by the LPA through use of CPOs and restricting leases to de-fragment the ownership of the high street. |
| Adapting to take on the threat from increasing internet sales | Recent research has highlighted the importance of **recognising the threat from increasing internet retailing** as an important trend that will continue over the short term. Some centres are adapting better than others for example, the incorporation of Click & Collect (delivery and returns) points into centres. Other more general strategies include ensuring adequate parking and accessibility to improve the general accessibility of the centre. The Grimsey Review recommends that **town centres focus on their role as a community hub**, where retail is just one element, creating a diverse offer which will help local centres to compete more effectively with online retailers. The DTCP recommends adapting retail capacity models in order to account for the erosion of the physical retail space requirement in the face of competition from online retail. LPAs in many secondary town centres will need to **actively plan for this future loss of retail space requirement**, particularly from the larger retailers. |
| Encouraging a mix of uses | A recent trend has been the growing presence and proportion of food and beverage (F&B) units within shopping centres and high streets. A BCSC report[14] suggests that there are various benefits that may result from this, and recommends that **shopping centre development include a mix of retail, F&B and leisure which are generally mutually supportive.** However, there are also warnings that this is not the whole solution to filling current vacancies left by retail decline. The BCSC recommends that F&B units in retail centres should be targeted appropriately according to the likely consumer profile. **Conversion from shops to residential uses** is also becoming one way for LPAs to make better use of underused retail space and prevent unwanted vacancy. Increased residential populations living in or near to the town centre will also improve footfall and potentially spend in these areas. |

[13] Peter Brett (2013): Investing in the High Street: Town Centre Investment Management and its role in delivering change

[14] BCSC (2014), Food and Beverage: A solution for shopping centres?

| Strategy | Description |
|---|---|
| | However, with high levels of pressure due to national housing shortages, there is a danger that the influx of residential development into town centres could undermine the retail and leisure functions of the centre. |

3.31 Although there are positive signs that the UK is finally beginning to emerge from the economic downturn, it is clear that our town centres and high streets post-recession will be very different to the 'boom' years of the last decade. Over the short to medium term at least the economy is forecast to experience a sustained period of lower growth in consumer spending, reduced bank lending, limited access to credit and cuts in public sector expenditure. This presents significant challenges for all those involved in town centre management, development and investment.

3.32 The growth of online shopping is also impacting on the vitality and viability of many of Britain's centres and high streets. This is placing pressures on rental growth and market demand in many centres; particularly the smaller secondary centres outside the *'top 100'* shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013[15]. In our opinion, a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that high quality schemes in the strongest prime shopping locations will continue to prosper. In contrast, the weaker secondary centres and shopping locations with a more limited offer, smaller catchments and negligible market demand will struggle to attract market interest and investment.

3.33 Notwithstanding the threat of online shopping, industry experts still predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 'reach' their customers and grow their businesses. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline in town centres. With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively 'push up' rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime

[15] Peter Brett (2013), Investing in the High Street: Town Centre

shopping locations) and having the right size, format and specification to meet the needs of modern retailers.

3.34 Research by the BCSC has also identified an increased emphasis on asset management, as owners and developers invest in the expansion or refurbishment of existing shopping centres to increase their investment value and turnover. In the current economic climate this investment in existing assets is less risky and financially onerous than new build projects. However, as the supply of suitable units "dry up" in prime locations, so retailers will also look at alternative options for delivering growth, such as through new out-of-centre openings, increasing sales through the internet, and/or expanding internationally.

3.35 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky conditions' conditions on existing retail parks.

3.36 In this context, it is clear that the 'top 50-100' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing local planning authorities will be how to revitalise the fortunes of struggling small and medium sized centres that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

3.37 Ashford Town Centre is a medium sized centre, and therefore faces such challenges. However, the Town Centre has experienced an uplift in the Venuescore retail rankings between 2013 and 2014, from 205th to 196th. The Venuescore assessment of the 2014-15 position of the centre also notes it to be 'Fashion Moderate' (i.e. not particularly focussed on fashion stores) and operating in a 'middle' market position (i.e. neither particularly high-end or low-end). The out of town Ashford Designer Outlet sits much lower in the rankings at 293rd in 2014, though it is noted that the centre has risen 33 places in one year from 326th place in 2013. The main reason why the town centre is ranked higher than the Designer Outlet is due to the presence of two 'department stores'[16] (Debenhams and Marks & Spencer). Ashford Town Centre faces significant competition from larger surrounding centres such as Canterbury (currently ranked 79th by Venuescore) where retail offer is stronger and where new development proposals are coming forward. The Venuescore rankings for Ashford Town Centre highlight the importance of the two department stores in maintaining the centre's position in the rankings. The presence of the Debenhams and Marks & Spencer brands

[16] Javelin Venuescore classifies all Marks and Spencer general merchandise stores 'department stores'.

will influence the level of new investment and the type of retailers that are attracted to these anchor retail brands.

3.38 The findings of this report indicate that for Ashford Town Centre, a focus on improving the range and quality of the retail and leisure offer in addition to improving links to the Designer Outlet will be necessary to maintain and improve the Town Centre's current position and role.

# 4.0 SHOPPING PATTERNS & MARKET SHARE ANALYSIS

4.1 This section first describes the Borough's existing network and hierarchy of centres, and then sets out the headline findings of the market share analysis for all (comparison and convenience goods) shopping purchases based on the results of the telephone interview survey of 1,000 households across the Borough and a wider Study Area.

## RETAIL HIERARCHY

4.2 The existing retail hierarchy for Ashford Borough, as set out in the 2008 Core Strategy and the saved policies of the Local Plan, is as follows:

- ***Ashford Town Centre*** – identified as a 'primary regional centre' that serves as the Borough's administrative centre. As the Borough's largest town centre, Ashford attracts visitors from across the Borough and beyond.
- ***Tenterden Town Centre*** – is identified as a 'secondary retail centre' that offers a smaller range of shops and services to Ashford, but nonetheless attracts visitors from the wider area.
- ***Wye, Charing, and Hamstreet*** – identified as 'villages/ local service centres' in the retail hierarchy, which perform the role of serving the day-to-day service top-up shopping and leisure needs for localised catchment areas.
- ***'Local centres'*** – there are 14 local centres across Ashford which generally provide more limited day to day top-up shopping provision.

4.3 This study focuses on identifying retail and leisure needs for the Borough's two town centres; Ashford and Tenterden.

## STUDY AREA & ZONES

4.4 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the Study Area has been defined using postcode geography and covers all the Ashford Borough local authority area, as well as some outlying areas (see Plan 1, **Appendix 1**).

4.5 The Study Area has been sub-divided into nine zones based on postcode geography and taking into account the location of the Borough's main centres and shopping facilities (see Plan 2**, Appendix 1**). These zones provide the sampling framework for the household telephone interview survey (see Table 4.1). This zone-by-zone approach also enables more detailed analysis of shopping patterns and expenditure flows both within and outside the Study Area for the purpose of the retail capacity assessment, in accordance with good practice.

Table 4.1 **Study Area – Zones, Postcode Sectors, Catchments and Population**

| Zones | Postcode Sectors | Geographic/ Catchment Areas | 2014 Population |
|---|---|---|---|
| 1a & 1b | TN23 1; TN24 0; TN24 8; TN24 9; TN23 4; TN23 5; TN23 6; TN23 7; TN23 3 | Ashford town | 74,421 |
| 2 | TN25 4; TN25 5; TN25 6; TN27 0 | North of Ashford town | 18,097 |
| 3 | TN26 3; TN25 7; TN26 1; TN26 2 | South of Ashford town | 14,292 |
| 4 | TN27 8; TN27 9; TN30 6; TN30 7; TN17 4 | Tenterden and surrounding area | 22,439 |
| 5 | TN18 5; TN31 6; TN31 7 | Rye | 16,895 |
| 6 | TN28 8; TN29 0; TN29 9 | Romney Marsh/ New Romney | 22,315 |
| 7 | CT18 7; CT18 8; CT19 4; CT19 5; CT19 6; CT20 1; CT20 2; CT20 3; CT21 4; CT21 5; CT21 6 | Hythe/ Folkestone | 83,630 |
| 8 | CT 4 7; CT 4 8; ME13 0; ME17 2 | Faversham | 14,570 |
| TOTAL: | | | 266,659 |

Source: 2014 population estimates based on the ONS 2012-based Sub-National Population Projections and derived from CJ's in-house *Experian MMG3 Geographic Information System* (GIS).

Notes: See Study Area plan in Appendix 1

## PATTERNS OF RETAIL AND LEISURE SPENDING

4.6 CJ commissioned NEMS Market Research to carry out a household telephone interview survey (HTIS) across the defined Study Area and zones in November 2014. The questionnaire was designed by CJ and (where possible) it asked similar questions to those set out in the previous retail study in order to facilitate comparison. The questionnaire is provided in **Appendix 3** along with the survey methodology and full 'weighted' survey results.

4.7 In total, some 1,000 interviews were conducted across the Study Area's nine zones (i.e. a minimum of 100 surveys per zone in accordance with accepted good practice). NEMS carried out structured interviews by telephone with the person responsible for the main household shop. A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the person responsible for shopping in the household. Questions on shopping preferences were also worded so that it eliminated Christmas shopping trips. Responses across the Study Area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated area were not under or over represented in terms of the market share assessment. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

4.8 The survey results detailing shopping patterns and preferences for different types of convenience and comparison goods shopping are used to inform the market share analysis[17] and turnover estimates for the main study centres, foodstores and out of centre facilities at 2015.

***Convenience Goods – Market Share Analysis***

4.9 Convenience goods[18] 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.). In order to determine and assess current food shopping patterns across the Study Area, the household survey comprised standard questions on:

- what store households *"normally"* carry out their main 'bulk' (trolley) food purchases (questions 1), what they like about this store/centre (question 2), and how they normally travel there (question 3);
- whether they link their main food shopping trip with any other activities (question 4) and where they go for this (question 5);
- whether households also regularly visited any other stores for main 'bulk' convenience goods purchases (question 6);
- where households carry out more frequent 'top up' (basket) purchases (question 7) and whether they visit any other stores for this form of shopping (question 9); and
- what proportion of their spend on food and household groceries is spend on main food shopping (question 8).

4.10 The results for main, secondary and top up shopping are then 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 assumed a standard weighting of 65% for main 'bulk' shopping, 10% for secondary main 'bulk' shopping, 15% for primary top-up shopping, and 10% for secondary top-up shopping. This weighting produces a composite pattern of convenience goods spending and has been applied to identify market shares, expenditure and turnover throughout the remainder of this study.

4.11 It should be noted that for the purpose of this market share analysis we have included expenditure on Special Forms of Trading (SFT), including internet sales, but have

[17] It is common practice in retail assessments to deduct special forms of trading (i.e. purchases over the internet, mail order shopping and market stalls) from average expenditure per capita figures at the outset according to national forecasts derived from Experian Business Strategies. Internet shopping and special forms of trading have therefore been filtered out from the survey results before undertaking the market share assessment.

[18] For the purpose of this retail assessment 'convenience goods' and 'food' shopping have the same meaning.

removed 'null' responses (including 'don't know' as a response). . Please note that a more detailed explanation of SFT is provided in **Section 3**.

4.12 For convenience shopping, the household survey shows that 6.3% of respondents across the Study Area purchase all their food shopping online, and the proportion is higher for those carrying out main 'bulk' food shopping (8.3%). Based on the zones that broadly comprise the Borough area (Zones 1 to 4), online food shopping is more popular within Zones 1a (10.3%) and 1b (8.4%), which broadly represents the Ashford urban area. Online food shopping in Zone 4 (Tenterden) accounts for a smaller proportion of main food expenditure (5.2%). In comparison, Experian's figures show that SFT accounted for some 8.5%[19] of convenience goods sales in 2014, which is higher than identified for the Study Area by the survey results.

4.13 Looking at in-store sales in more detail, the results of the market share analysis for stores in the Borough are set out in Table 1 (**Appendix 4**). Here the market share analysis shows mixed results in terms of convenience expenditure retention across the eight study zones. Overall, stores in Ashford Borough retain 46.3% of all convenience expenditure (top up and main food shopping) across the Study Area (i.e. Zones 1 to 8). Although this retention level may appear low, it is taken from a relatively large geographic area (i.e. the Study Area). Typically, foodstores command a catchment equivalent to a 5-10 minute drive-time (depending on the scale and location of the foodstores relative to existing competition, etc.), as shoppers are more likely to use stores in proximity to where they live. When focusing on the zones that broadly comprise the Borough area (Zones 1 to 4), the retention level for all stores in the Borough increases to 82.9%.

4.14 Stores in Ashford Town Centre attract just 2.4% of all Study Area expenditure. Within Zones 1a and 1b, which broadly correspond to the Ashford urban area, the market share for stores in the town centre increases to 4.7% (there are no comparable figures for these zones in the 2003 study). The low level of convenience market share for stores in Ashford Town Centre reflects the absence of a main foodstore in the town centre. In contrast, edge and out of centre foodstores achieve a market share of 34.2% for the Study Area as a whole, increasing to 57.6% for the Borough area (Zones 1 to 4) and to 70.8% in Zones 1a and 1b only (i.e. the Ashford urban area).

4.15 Looking at individual stores, the Sainsbury's at Warren Retail Park and Tesco Extra at Kingsnorth are the most popular foodstores in the Borough; attracting a market share of 9% and 8.8% respectively within the Study Area. The market shares increase to 15.6% for each store from within the Borough area only (i.e. Zones 1 to 4).

4.16 Stores in Tenterden Town Centre (including the edge of centre Tesco) achieve a 7% market share of total Study Area expenditure. Of this total, Waitrose has a recorded

[19] This all SFT (including online sales) and does not exclude sales serviced from stores.

market share of 2.4% and Tesco is achieving a 4.2% share of total Study Area expenditure. Within Zone 4, which broadly corresponds to Tenterden's shopping catchment area, the market share of foodstores in the town centre increases to 55.1% (of which Tesco is achieving a 32% share and Waitrose a 18.3% share). This reflects our previous observations on foodstore retail catchments, which tend to draw shoppers and expenditure from within a 5-10 minute drive.

4.17 Stores in the Borough's smaller centres and villages are achieving a smaller market share of total Study Area expenditure of 2.7%; increasing to 5.2% for the Borough area (Zones 1 to 4). This lower level of convenience market share level is expected given that the type of provision in the Borough's smaller centres is principally aimed at top-up shopping purchases rather than main food shopping.

***Comparison Goods – Market Share Analysis***

4.18 Comparison goods[20] are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods (also see Glossary of Terms). The household survey comprised of questions on the following main non-food expenditure categories, as defined by Experian Business Strategies:

- 'clothing and footwear' (question 10);
- 'recording media for pictures and sound' (such as records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (question 12);
- 'audio visual, photographic, computer items' (such as stereos, radios, TVs, software, cameras, kindles, iPads, telephones, etc.) (question 13);
- 'all other electrical goods including domestic electrical appliances' (such as irons, kettles, fans, coffee makers, food mixers), white goods (fridges, freezers, dishwashers) and smaller etc.), (question 14);
- 'shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials', (question 15);
- 'games & toys; pets and pet products; hobby items; sport, camping goods and bicycles; and musical instruments', (question 16);
- 'furniture, carpets, other floor coverings and household textiles' (includes beds, sofas, tables, etc.), (question 17);
- 'DIY goods, decorating supplies and garden products' (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc.), (question 18);

[20] Please note that comparison goods and non-food shopping have the same meanings.

- 'personal care, including electric and non-electrical appliances, cosmetics, perfume, toothpaste, aftershave, sun tan lotions, etc.', (question 19);
- 'medical goods, other pharmaceutical products and therapeutic appliances / equipment' (e.g. medical drugs, spectacles, contact lenses, hearing aids, wheelchairs, etc.), (question 20); and
- 'all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects', (question 21).

4.19 As for convenience goods, the updated retail capacity assessment draws on the overall market share analysis for all comparison goods shopping in the Borough (see Table 1 in **Appendix 5**). This has been derived by applying the market shares for the different categories of comparison goods to the comparable average per capita expenditure levels by goods type within each survey zone. This is an accepted approach as it provides a more accurate assessment of the distribution and weight of spend by respondents across each zone. The more detailed expenditure category approach means that the resultant market shares for centres and stores are not skewed by any particular comparison goods expenditure category. As a result, the analysis provides a more robust picture of overall shopping patterns for comparison goods.

4.20 Table 1 (**Appendix 5**) shows the market shares (%) for all comparison goods shopping purchases made both within and outside the Study Area, including SFT. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-12. It should be noted that the market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that that the resultant shares are not skewed by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

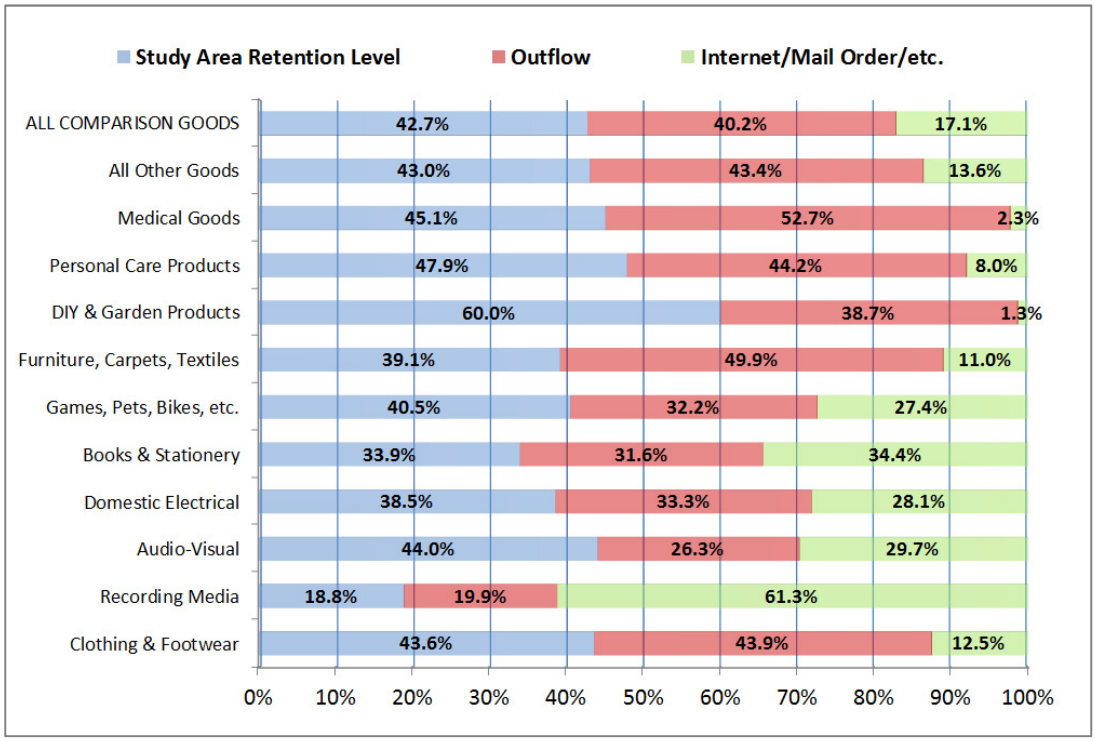
4.21 The key headlines of the market share analysis are briefly described below:

- The Borough's non-food shops and stores are achieving a retention level of 42.7% in the Study Area, increasing to 68.2% for the Borough (Zones 1 to 4).
- The market share for SFT (including purchases via the internet and mail order) is 17.1% for the Study Area as a whole. It is slightly lower for the Borough area (Zones 1 to 4) at 16.6%, and market shares range from a high of 18.9% in Zone 1a (Ashford Central West) and a low of 13.6% in Zone 4 (Tenterden).
- Experian's latest *Retail Planning Briefing Note 12.1* (October 2014) shows that the national average market share for non-store (SFT) comparison goods retail sales was 15.6% in 2014. The average for the Study Area (17.1%) and Borough (16.6%) are therefore above the national average figure.

- Ashford Town Centre (24.4%) is achieving the highest market share of centres in the Study Area. Its market share increases to 41.2% for the Borough area.
- Out of centre stores and retail parks in the Borough attract a market share of 14.5% for the Study Area and 15.0% for the Borough area only. The main out of centre locations for comparison shopping within the Study Area include Ashford Designer Outlet (4.9%) and Gallagher Retail Park/ Norman Road (4.8%).
- Tenterden attracts a smaller market share of 2.9% for the Study Area, increasing to 5.3% for the Borough. Tenterden is achieving a market share of 21.6% within Zone 4, which broadly correlates to Tenteden's local shopping catchment.

4.22 As the figure below shows, the market shares (retention levels) for the different categories of comparison goods retailing in Ashford Borough and for internet shopping vary significantly across the Study Area (see Tables 1-12, Appendix 5).

Figure 4.1 **Market Shares for Different Categories of Comparison Goods Retail**




4.23 For example Ashford Town Centre achieves a market share of 26.1% for clothing and footwear purchases across the Study Area as a whole. Non-store clothing and footwear purchases (via the internet, mail order, etc.) account for a market share of 12.5% for the total Study Area. Tenterden commands a much smaller market share for clothing and footwear (1.7%), which is expected for the centre's size and role in the shopping hierarchy.

4.24 The analysis identifies a 42.5% 'outflow' or leakage to competing shopping locations for clothing and footwear from the wider Study Area. Key competitor centres for this form of retail include Canterbury Town Centre (18.2%) and Folkestone Town Centre (12.3%).

4.25 The figure also shows that centres and stores in Ashford Borough are achieving a more limited market share for recording media, audio-visual and domestic electrical products. As the table shows, this is mainly explained by the fact that a high proportion (61.3%) of recording media sales are via the internet, mail order, etc. Some 34.4% of expenditure on books and stationery is also via the internet along with 29.1% for audio visual products. This reflects national trends and the impact of multi-channel retailing on shopping preferences and expenditure.

***Changes in Comparison Goods Market Shares for Ashford Town Centre and Ashford Designer Outlet Since 2003***

4.26 The comparison goods market share analysis completed in the *2003 Retail Study* discounts Special Forms of Trading (SFT) for Ashford Town Centre and Ashford Designer Outlet (Tables 4a(i) and 4c(i), Appendix 4, 2003 Retail Study). There is no information on market shares including SFT. Therefore, in order to compare changes in shopping patterns since 2003 we have discounted SFT from the comparison goods market shares. This is described and analysed more in detail in **Section 7** of this report as part of the retail capacity assessment.

4.27 A summary of the key changes in comparison goods market shares (excluding SFT) for Ashford Town Centre and Ashford Designer Outlet is set out in the table below:

Table 4.2 **Changes in Comparison Goods Market Shares for Ashford Town Centre and Ashford Designer Outlet: 2003 to 2014**

| | Ashford Town Centre | | Ashford Designer Outlet | |
|---|---|---|---|---|
| | 2003 | 2014 | 2003 | 2014 |
| Clothing and footwear | 27.3% | 29.9% | 8.8% | 16.8% |
| All comparison goods | 24.0% | 25.1% | 4.5% | 5.0% |

Source: Table 1 and 2 (Appendix 5); and Tables 4a(i) and 4c(i), Appendix 4, 2003 Retail Study.
Notes: Market shares exclude Special Forms of Trading

4.28 As the table shows, after excluding SFT from the market share analysis, Ashford Designer Outlet is achieving a market share of 5.0% for all comparison goods type shopping in the Study Area. This equates to a slight increase (+0.6 percentage points) in the corresponding market share identified in 2003 (of 4.5%). Over the same period the total comparison goods market share for Ashford Town Centre increased from 24% to 25.1% (+1.1 percentage points).

4.29 Looking at just fashion and footwear shopping patterns, which accounts for the majority of comparison goods retailers in the Designer Outlet, the centre attracts a market share of 16.8% from the total Study Area. This represents an increase from 8.8% in 2003, which probably reflects the improved range of fashion and clothing offer in the centre over the last ten years or more. The market share of clothing and footwear has also increased for Ashford Town Centre, albeit at a lower rate (from 27.3% in 2003 to 29.9% in 2014).

4.30 The findings also show that the total comparison goods market share for the Designer Outlet has remained largely unchanged since the 2003 Retail Study. However, the centre's market share for clothing and footwear has increased from 8.8% to 16.8% (excluding SPF), which may take account of new fashion retailers that have located to the centre since 2003. While comparison market shares (excluding SFT) for Ashford Town Centre have also improved since 2003, they have increased at a much lower rate than the Designer Outlet. This indicates some level of competition between the Designer Outlet and Ashford Town Centre for clothing and fashion purchases.

**SUMMARY**

4.31 In summary, the survey-derived market shares show that all the Borough's food and convenience stores are achieving strong 'retention levels' in those zones that comprise the Ashford Borough area (Zones 1 to 4); particularly for Zones 1a and 1b that represent the Ashford urban area. There is more limited market penetration in Zones 7 and 8 due to competition from foodstores within or close to these zones (e.g. Folkestone, Canterbury, Faversham and Hythe).

4.32 The Borough's main out-of-centre foodstores are achieving a higher market share than for the main town centres; 34.2% across the Study Area as a whole, but increasing to 57.6% for the Borough area and 70.8% for Ashford Town urban area. This highlights the potential to increase the market share of Ashford Town Centre through new investment in food and convenience goods offer, subject to the availability of suitable and viable sites. This could help to increase the town centre's overall convenience market share by *'clawing back'* some shoppers and expenditure from competing edge and out of centre stores, both within and outside the Borough.

4.33 In terms of comparison goods retailing, it is apparent that Ashford Town Centre is facing competition from centres and stores both within and outside the Borough (e.g. Canterbury and Folkestone) for a wide range of non-food purchases; particularly for fashion shopping. This reflects the relative role and function of Ashford Town Centre in the sub-region; and the more limited range, choice and overall quality of the town centre's comparison goods offers compared with those higher order centres. At the same time a high proportion of household expenditure on certain comparison goods categories (i.e. audio-visual, electrical goods, books and music) is increasingly made via the internet.

4.34 Overall, while the town centre appears to have improved its market share for comparison goods, it is lagging behind the Designer Outlet; particularly with regard to clothing and footwear. The Designer Outlet's market share is likely to further increase should proposals to extend the centre be delivered. This places even greater importance on strengthening the town centre's competitive position and allow it the potential to retain existing customers and attract linked trips from customers visiting the Designer Outlet Centre.

4.35 The challenge for Ashford and Tenterden Town Centres over the development plan period is in maintaining and strengthening their retail market shares in the face of the competition from larger neighbouring centres, increasing demand for out-of-centre facilities and the growth of internet sales. However, this will depend on whether market demand can be generated and satisfied in the Borough's main centres (in particular Ashford Town Centre) through new investment and development in the scale and quality of their retail floorspace.

# 5.0 ASHFORD TOWN CENTRE: HEALTH CHECK

5.1 Sections 6 and 7 provide high-level health check updates for the two main centres in Ashford Borough, namely Ashford and Tenterden Town Centres.

5.2 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

5.3 In accordance with the NPPG (paragraph 005), there are a number of *Key Performance Indicators* (KPIs) that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the KPIs include:

- the scale and diversity of uses (e.g. retail and services offer);
- retailer representation and demand;
- commercial property indicators (such as Prime Zone A Rents);
- changes in vacancy levels;
- accessibility and parking provision;
- the quality of the town centre environment;
- pedestrian footfall; and
- customers' views and behaviour.

5.4 In this case the most and reliable KPIs have been gathered (where possible) for Ashford and Tenterden Town Centres to help inform the assessment of their overall strengths and weaknesses in retail terms, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability.

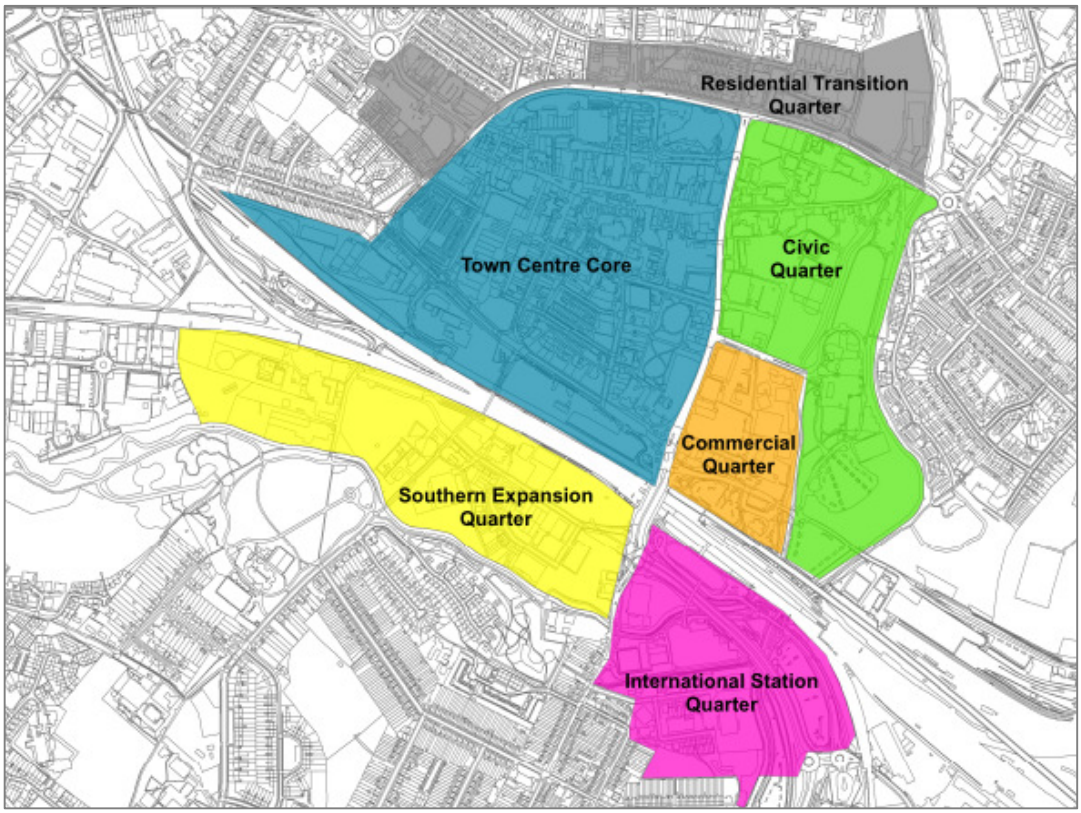
5.5 The health check assessments of the two centres have been informed by analysis of the Council's audit of outlets, broken down by specific retail and service categories. The two managed shopping malls in Ashford Town Centre have been surveyed using the most up to date floorplans and stores lists, sourced by Carter Jonas. This analysis also provides an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres, benchmarked against UK averages which are based on Experian Goad's analysis of approximately 1,950 centres and shopping locations in the UK. The summary analysis and tables provided by the Council are set out in **Appendix 6**.

5.6 In addition we have also referred to other datasets and research to help assess the relative vitality and viability of the Borough's main town centres (including CoStar's published data on retailer requirements and Prime Zone A rental levels). This has been further supplemented by site visits and audits of the main town and village centres carried out by CJ in November 2014.

## RETAIL CONTEXT

5.7 Ashford Town Centre is the Borough's largest centre. It has been identified as performing the role of a primary regional centre, attracting visitors from a wide catchment area and located within a strategic network of town centres. The Ashford Town Centre Area Action Plan 2000 (ATCAAP) has identified five defined 'quarters' that lie outside of the Town Centre 'Core', each with a recognisable character as shown in the figure below.

Figure 5.1 **Ashford Town Centre Area Action Plan Quarters**




Source: ATCAAP 2010

5.8 The ATCAAP describes the different five quarters as follows:

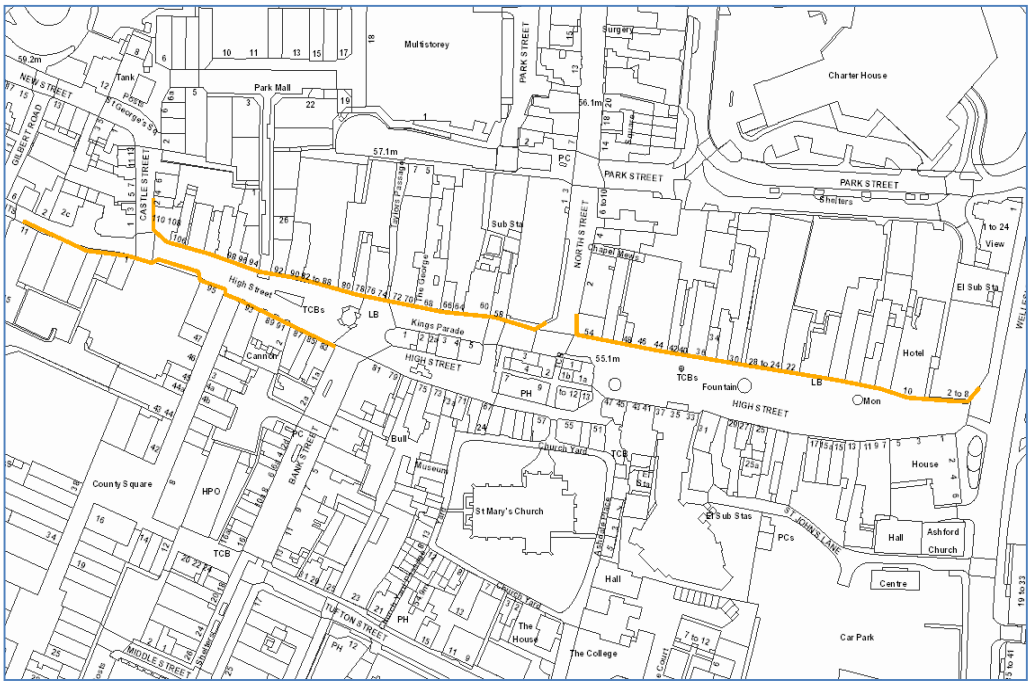
- The Commercial Quarter, a particularly accessible area containing the domestic station and adjacent to Ashford International, which will be a focus for the development of commercial floorspace (indicative capacity 55,000m$^2$).
- The Southern Expansion Quarter, which aims to create better links between the area to the south of the railway and the main Town Centre and develop a vibrant, high density mixed use area. The delivery of Victoria Way, a key piece of strategic infrastructure for this quarter of the Town Centre, has now been implemented.
- International Station Quarter is anticipated to be a new gateway to the Town Centre, providing a range of business, travel and tourist related functions. Plans for this quarter also include improving the links to the domestic station.

- The Civic Quarter is currently a focus for civic and leisure uses with attractive areas of open space, which will be retained and enhanced.
- The Residential Transition Quarter will be maintained as an area that provides a transition from the busy core area to the predominantly residential areas beyond.

5.9 Ashford Town Centre is focussed around a compact core. The primary (linear) shopping street was identified in the Local Plan (2000) as the traditional High Street. The Park Mall and Country Square shopping centres front directly onto the High Street, to the north and to the south respectively. North Street and Bank Street link the High Street and the shopping centres together and provide a secondary frontage, although it should be noted that no secondary frontage has been formally identified in current policy for the Borough.

5.10 Bank Street has a high concentration of A2 (service) uses and the level of A1 (retail) uses has therefore been protected by the Local Plan Saved Policy SH4.

Figure 5.2 **Ashford Town Centre – Primary Shopping Frontage 2000**




Source: Ashford Local Plan 2000

## RETAIL COMPOSITION AND DIVERSITY

5.11 The assessment of the current retail and service provision in Ashford Town Centre (measured by outlets) has been informed by the Council's annual town centre surveys (carried out in 2012, 2013 and 2014), which cover the primary retail frontage along the High Street only. In addition to this we have also assessed the current provision in the town's main shopping malls using the most up to date available information from the centre's shop directories and commercial property databases.

5.12 The table below shows the changes in the composition and diversity of the town's retail and service outlets over the past two years, from 2012 to 2014, based on the Council's audits (i.e. excluding the two main shopping malls).

Table 5.1 **Ashford Change in Retail Composition, 2012- 2014 (Primary shopping streets only)**

| Category | 2014 (units) | 2012 (units) | Change |
|---|---|---|---|
| Convenience | 7 | 7 | 0 |
| Comparison | 45 | 49 | -4 |
| Service | 97 | 93 | +4 |
| Leisure | 45 | 48 | -3 |
| Sui-Generis/ other | 1 | 1 | 0 |
| Vacant | 32 | 28 | +4 |
| **Total** | 227 | 226 | +1 |

Source: Ashford BC Town Centre Surveys 2012 and 2014

5.13 The table below shows the total retail provision across the primary shopping streets and the two shopping centres, compared to UK average benchmarks.

Table 5.2 **Ashford Retail Composition by Outlets (Primary shopping streets only) 2014**

| Category | Primary Shopping Area | Shopping Centres | Total | Total % | UK Average (%) |
|---|---|---|---|---|---|
| Convenience | 7 | 0 | 7 | 2% | 8% |
| Comparison | 46 | 61 | 107 | 33% | 33% |
| Service | 96 | 15 | 111 | 34% | 25% |
| Leisure | 45 | 5 | 50 | 15% | 22% |
| Sui-Generis/ other | 1 | 0 | 1 | 0% | 0% |
| Vacant | 32 | 20 | 2 | 16% | 11% |
| **Total** | 227 | 101 | 328 | 100% | 100% |

Source: Ashford BC Town Centre Surveys 2012 and 2014.

Source: Shopping Centre store directories and to let information.

Note: National Benchmarks taken from Experian Reports 2014

5.14 There are currently 328 units in Ashford Town Centre. Two thirds of these units are along the primary shopping frontages, and this number has remained relatively stable over the past two years.

5.15 The level of convenience provision in the centre is particularly low, making up just 2% (7 units) of the total provision. This is below the UK average of 8%. Existing convenience provision in the centre includes an Iceland, Tesco Express, and a Holland & Barratt outlet. The closest main foodstore to the centre is the Asda store adjacent to the Designer Outlet Centre. There is also a Lidl on the edge of the Town Centre.

5.16 The level of comparison provision is in line with the UK average (33%), although along the traditional shopping street (High Street) this has declined by four units since 2012. This trend was also noted in the previous Retail Study. The level of provision of clothing and footwear (i.e. fashion) retailers was particularly low along the traditional shopping streets, with just five units identified at present.

5.17 In contrast to this, the shopping centres have around 60% of provision dedicated to comparison retail, and contain many national multiple retailer brands such as H&M, River Island, Next and New Look. The offer in County Square shopping centre is particularly strong, containing a majority of key multiple brands and anchored by a large Debenhams department store. The Park Mall shopping centre, which is anchored by Wilkos has a much smaller offer (27 units compared to 74 in the County Square centre). The centre has a lower proportion of multiple retailer brands and is more value orientated. The retail offer in County Square shopping centre is particularly important to the town centre's overall vitality and viability, as it complements the more limited fashion offer of the High Street and traditional shopping streets, which have a low proportion of multiple retailers and fashion-orientated brands.

5.18 This suggests that there is a need for larger format shops and floorspace in the town centre to accommodate the requirements of modern retailers and major space users, subject to retail capacity and market demand assessments.

5.19 Ashford Town Centre has a particularly high level of service provision, around 34% of units compared to a UK average of 25%. This category includes A1 service uses such as hairdressers and A2 uses (financial and professional services).

5.20 The leisure service provision in the Town Centre is below national levels – 15% compared to a UK average of 22%. The majority of this provision is made up of Class A3 restaurants and cafés (22 units), Class A5 takeaways (8 units) and Class A4 drinking establishments (5 units) located on the traditional shopping streets. The two shopping centres have a relatively low food and beverage provision. This suggests that there is potential to improve the range and quality of the town's offer to help strengthen the attraction of both its daytime and evening economy. Of note, the town centre lacks a major leisure facility such as a cinema. The nearest key leisure facility is the AMF Ten Pin Bowling centre on Station Road. The nearest other key leisure facilities are located out of centre at Eureka Leisure Park, which includes a 12 screen cinema and food and beverage provision. A more detailed assessment of leisure provision is provided in Section 8.

**VACANCY LEVELS**

5.21 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. In this case we have drawn on the vacancy levels (measured by

outlets) recorded by the Council as part of their surveys, which in this case also cover the two shopping centres (County Square and Park Mall).

5.22 However, it should be noted at the outset that simple assessments of the number and proportion of vacant units in centres have to be interpreted with caution, as there is a natural 'churn' of units closing and opening in centres at any one time. For example, some shops may be vacant because they are undergoing refurbishment for immediate occupation, or they may be subject to redevelopment plans. Conversely, although low vacancy levels are often interpreted as a sign that a centre is performing strongly, it may also mask the fact that there is a limited supply of new floorspace to meet the needs of retailers and businesses seeking representation in the town centre.

5.23 As the table below shows, there were 52 vacant units recorded in Ashford Town Centre in November 2014, which was equivalent to a vacancy level 16%. This is above the UK average vacancy rate of 11.5%. The higher vacancy rates were found in the two shopping centres; 23% in County Square and 19% in Park Mall. The number and proportion of vacant units has increased in the town centre and County Square shopping centre over the past two years, whereas the number of vacant units has decreased in Park Mall over the same period. It should be noted that the number of vacancies in County Square has further increased to 19 vacancies as recorded in March 2015 by Kennedy Wilson, agents for the shopping centre. This excludes units (5) that are subject to temporary leases. As such, there are 24 units within County Square that are available letting. We understand that a number of vacancies in County Square have been vacant since the opening of the centre during the height of the recession. Looking elsewhere in the town centre, concentrations of vacancies were identified along Bank Street (from Tufton Street to Queen Street) and along High Street (from Wellesley Road to North Street).

5.24 Conversations with local agents working in the area revealed that a small number of units along the primary frontage have been vacant for a period of several years. However local data is not available to give further detail on the length of vacancies in this area.

Table 5.3 **Ashford Change in Vacancy Rates by Outlets, 2012- 2014**

| Date | 2012 | 2014 | Change | UK Average |
|---|---|---|---|---|
| Town Centre Streets Vacancy Rates | | | | |
| No Units Vacant | 28 | 32 | +4 | n/a |
| % units vacant | 12% | 14% | +2 | 11.5% |
| County Square Vacancy Rates | | | | |
| No Units Vacant | 8 | 14 | +6 | n/a |
| % units vacant | 12% | 23% | +11% | 11.5% |

| Date | 2012 | 2014 | Change | UK Average |
|---|---|---|---|---|
| Park Mall Vacancy Rates | | | | |
| No Units Vacant | 10 | 6 | -4 | n/a |
| % units vacant | 31% | 19% | -12% | 11.5% |
| Total Vacancy Rate | | | | |
| Total Vacant | 46 | 52 | +6 | n/a |
| % of shops Vacant | 14% | 16% | +2% | 11.5% |

Source: Town Centre Vacancy Rate Monitoring November 2012 and 2014, Ashford Borough Council

Notes: National Benchmarks taken from Experian Centre Category Reports 2014

The number of vacant units in County Square increased to 19 as of March 2015

## RETAILER REQUIREMENTS

5.25 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The *CoStar Focus* national retailer requirements database is a standard published dataset used to inform retail assessments and provides consistently sourced evidence detailing the changes in retailer requirements over a period of time.

5.26 The latest CoStar Report recorded seven requirements for retail floorspace in Ashford in December 2014, representing a total maximum floorspace requirement of 8,414 $m^2$ gross[21].

5.27 It is noted that there are no recorded requirements from traditional comparison retailers; in particular from fashion multiples seeking representation in the town centre.

5.28 Those operators with a stated interest include a number of national multiple retailers and food and beverage operators (e.g. Iceland and Aldi). However it should be noted that the majority of the retailers identified will be seeking larger format units, preferably in edge or out of centre locations (e.g. Magnet, Majestic Wines, Jollyes, etc.).

5.29 There were also seven requirements for leisure floorspace, representing a total maximum floorspace requirement of 4,226 $m^2$ gross. Leisure operators with requirements in the Borough include food and beverage operators (e.g. Wok & Go and Millie's Cookies) and David Lloyd Leisure.

5.30 Notwithstanding this high level assessment of current market demand, the Council should be aware that many retailers prefer not to publish their requirements as it could damage their negotiating position where they are seeking representation in new locations. Moreover, such databases can only identify the current level of market demand and do not reflect how demand might change in the future following new development and investment. For example experience shows that a new scheme that

[21] Recorded by CoStar in December 2014.

offers retailers modern, well-configured floorspace adjacent to like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

## PRIME ZONE A RENTS

5.31 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of the centre and its prime retail pitch as a shopping location.

5.32 Although there is limited information on retail rents in the area, discussions with local property agents on recent deals indicated that Prime Zone A retail rents in Ashford town centre have fallen from a pre-recession peak of around £861 per $m^2$ to a current range of between £280 per $m^2$ (minimum) and £490 per $m^2$ (maximum). The variation in rent is dependent on a number of factors, with units located along the prominent mid-section of the High Street generally reaching higher rents, whereas those units in more secondary locations achieving much lower rents.

5.33 Kennedy Wilson, agents for County Square shopping centre, report that the shopping centre is achieving higher Prime Zone A rents than the High Street shops, of between £490 per $m^2$ and £590 per $m^2$. The variance is explained by the relative position and size of the units within the shopping centre. This level of rent is lower than achieved in Whitefriars shopping centre in Canterbury (around £655 per $m^2$), but is higher than current rents achieved in Bouverie Place shopping centre in Folkstone (£209 per $m^2$).

## ACCESSIBILITY & PEDESTRIAN FLOWS

### Accessibility

5.34 Ashford Town Centre is highly accessible by both public and private transport.

5.35 The initial phase of the proposed SmartLink bus service between Ashford, key shopping areas and the suburbs was completed in 2008. The service includes a Park and Ride service which links key employment sites and residential areas to the International Station and Designer Outlet Village. The International Station has a regular bus service (around every ten minutes) providing links into the town centre. Cycle parking facilities are also provided at the Domestic station.

5.36 The main shopping area is roughly a ten minute walk from the stations. The Domestic and International stations in Ashford provide rail links for Eurostar trains into Europe from London, in addition to regular services to St Pancras International in London and Thameslink services. There is a regular bus service which operates between the station and the town centre.

5.37 By car, the Town Centre is also located in close proximity to Junction 9 of the M20, which provides links to surrounding areas. There is a good level of car park provision in

and around the town centre. This includes areas of on-street parking on High Street and interlinking roads. There are a further 17 car parks in total, of which eight are run by the Council. There is a large car park to the rear of Park Mall, making it easily accessible. The Council have also run a number of initiatives which enable free parking to boost trade in the Town Centre at peak times. For example, free parking was introduced in a number of town centre car parks from Sunday 19th October 2014 and every Sunday thereafter (as well as off-peak free parking on other days).

5.38 The Town Centre AAP also identified that movement within and across the town centre is somewhat restricted as a result of barriers, such as roads, that cut through the centre, bringing congestion and large volumes of traffic. The successful completion of the major new road (Victoria Way) will have helped to reduce these effects and will also link the International Station and the A28 Chart Road.

### Pedestrian Flows

5.39 Pedestrian flows are concentrated along the linear High Street and through to the two shopping centres on either side. Springboard pedestrian count data for the High Street in 2014 found that Ashford Town Centre has an average daily footfall of 4,763, with the highest footfalls recorded on Saturdays. Data for the Ashford Farmers' Market, which began in July 2014 and is held once a month, showed there to be almost 3,400 visitors on average, which has helped to boost Sunday footfall in the Town Centre by around 15% on these days. The Council's initiative to provide free car parking in several town centre car parks in the lead up to Christmas is also reported to have increased footfall levels by around 25%. Notwithstanding this, a time series analysis of previous footfall trends between 2009 and 2012 indicate a general decline in footfall over this period, from a peak in 2009[22].

## CUSTOMER VIEWS AND PERCEPTIONS

### Household Survey

5.40 The household telephone interview survey asked specific questions on respondents' views and perceptions of Ashford Town Centre as a place to shop and visit for a wide range of uses and attractions. This included identifying key improvements residents would like to see that might encourage them to visit Ashford Town Centre more often for shopping and other purposes.

5.41 The survey results showed that respondents liked the following features of Ashford Town Centre. The results are shown in the table below.

[22] Ashford Borough Council Footfall data

Table 5.4 **Feature respondents liked about Ashford Town Centre**

| Response | Study Area |
|---|---|
| Nothing/ very little | 41% |
| Good range of shops | 19% |
| Close to home | 14% |
| Compact | 7% |
| Attractive environment | 5% |

Source: HTIS, July 2014

5.42 When asked what, if anything, respondents would improve in Ashford Town Centre that would encourage them to visit more, the majority in each zone stated '*nothing or very little'* (32% across the whole Study Area). The table below provides a summary of the most frequently raised suggested improvements for the town centre.

Table 5.5 **Key Improvements for Ashford Town Centre**

| Response | Study Area |
|---|---|
| Nothing | 32% |
| More national multiple shops / High Street shops | 25% |
| More / better comparison retailers (i.e. non-food shops) | 17% |
| Free car parking | 9% |
| More/ better car parking | 9% |
| Less vacant units | 5% |
| Better access by road | 5% |

Source: HTIS, July 2014

5.43 Across the whole Study Area, the improvements considered most important were those relating to the comparison shopping offer. '*More national multiple shops/ High Street shops*' was the highest chosen response (other than '*Nothing'*), followed by suggestions for '*more/ better comparison retailers'*. Respondents also highlighted a desire for free car parking or more/ better car parking in the Town Centre. A reduction in vacant units and better access by road were also considered to be important.

5.44 There was some variation across the different zones, particularly for Zones 1a and 1b, which cover the Ashford urban area. In these zones, a higher proportion of respondents identified the need for better comparison retailers and more national multiples (30% and 43% respectively in Zone 1a, and 39% and 57% in Zone 1b).

### Stakeholder Consultation

5.45 Consultation was carried with key stakeholders in Ashford Town Centre including representatives serving local community interests as well as key land owners and

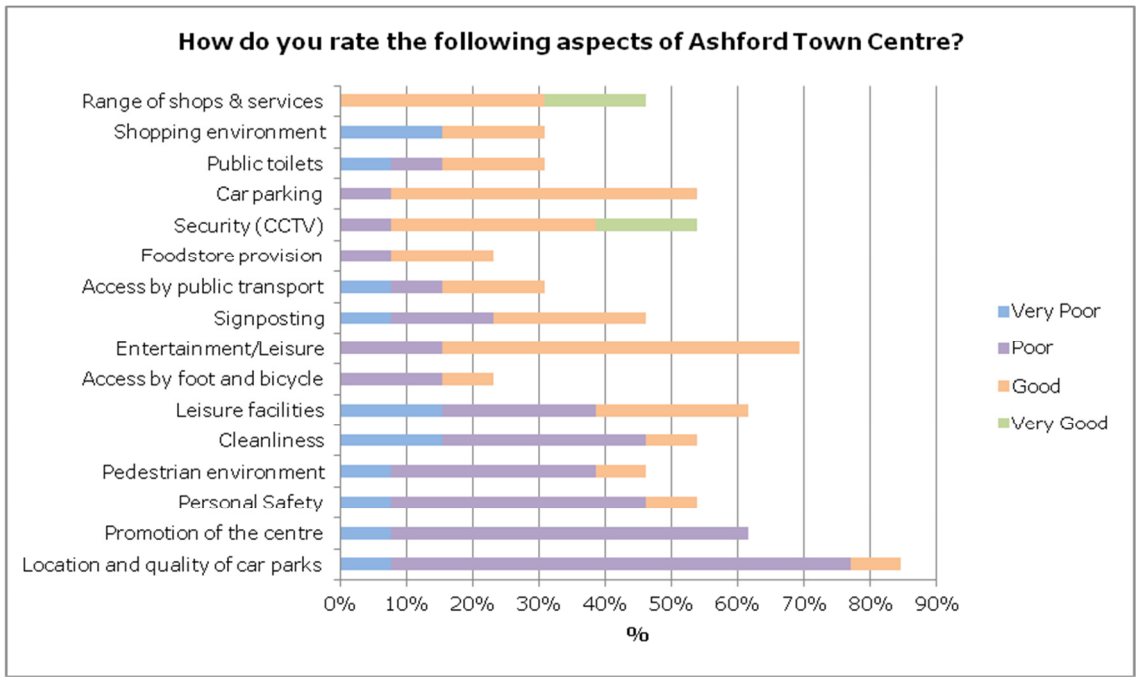
business representatives. A full list of consultees contacted as part of the study is provided in **Appendix 12**.

***Public Sector***

5.46 The Central Ashford Community Forum (CACF) was consulted collectively on their views on Ashford Town Centre. Members of the CACF were asked to rate the Town Centre on its best and worst features, suggested improvements and also comment on the relationship between the outlet centre and the Town Centre.

5.47 The figure below provides a summary of how respondents rated various aspects of the town centre from very good to very poor. As the figure shows, the location and quality of parks was the best rated aspect of the town centre while the provision of entertainment/ leisure services was rated as very poor.

Figure 5.3 **Ratings for Ashford Town Centre**




Source: CACF January 2015

5.48 Respondents were asked what improvements they would like to see made to Ashford Town Centre. The forum's members referred to Tenterden Town Centre as a good example of the type of improvements that could be made to Ashford Town Centre. For example, Tenterden was identified for its good range and quality of pubs and eateries, high street and independent shops and the proximity and price of car parking. Some respondents also identified the need for higher quality shops in Ashford Town Centre to help capture trade from the affluent populations living in the surrounding areas. The most popular responses for suggested improvements were:

Table 5.6 **Key Improvements for Ashford Town Centre**

| Improvement | Response % |
|---|---|
| More / better non-food shops | 45% |
| Increased choice/range of shops | 36% |
| More / better food shops | 36% |
| More / better cultural facilities | 36% |
| More / better entertainment facilities | 36% |
| More smaller independent & specialist shops | 36% |
| More / better range of 'high street' retailers | 27% |
| More / better restaurants | 27% |

Source: CACF January 2015

5.49 Respondents to the survey also commented on the current relationship between Ashford Town Centre and Ashford Designer Outlet. In general terms a higher proportion of respondents felt that the Designer Outlet has had a negative impact on the Town Centre, with a perception that few linked trips are made between the two. Respondents indicated that:

- very few people felt that the two centres were interlinked;
- most felt that the relationship between the two needs to be improved; and
- most felt that the centres require joint promotion.

5.50 In order to generate more linked trips and encourage those visiting the Designer Outlet to also visit the Town Centre, respondents identified the key improvements. The responses shows that most felt a new cinema would be a vital improvement. This was followed by access improvements and increasing the range of shops and restaurants in the Town Centre. The most mentioned responses were as follows.

Table 5.7 **Creating Linked Trips with Ashford Designer Outlet**

| Improvement | Response % |
|---|---|
| A cinema in the Town Centre | 73% |
| Safer cycle links | 64% |
| Better shuttle bus service | 64% |
| More convenient cycle links | 55% |
| Shopping vouchers to use in the Town Centre | 55% |
| More / better restaurants and cafes in the Town Centre | 55% |
| More convenient pedestrian links | 45% |
| Safer pedestrian links | 45% |
| More / better non-food shops in the Town Centre | 45% |
| More marketing / advertising for the Town Centre | 45% |

| Improvement | Response % |
|---|---|
| Longer parking times at Ashford Designer Outlet | 36% |
| More / better food shops in the Town Centre | 36% |
| More / better entertainment / eating places in the Town Centre | 36% |
| Better signposting to the Town Centre | 36% |

Source: CACF January 2015

5.51 Respondents were asked more generally about how Ashford Town Centre's leisure offer could be improved. Apart from the need for a cinema in the town, some mentioned a requirement for other cultural facilities (such as theatre provision) as well as improved public open spaces. Although 'more street cleaning' did rate highly, there were also comments confirming that the Town Team kept the centre very clean in general. The most frequent responses are shown in the table below.

Table 5.8 **Key Improvements for Leisure in Ashford Town Centre**

| Improvement | Response % |
|---|---|
| An art house cinema | 45% |
| More / better cultural facilities | 45% |
| A theatre | 27% |
| More better parks / green spaces | 27% |
| Provision of public toilets | 27% |
| Better cinema provision e.g. new multi-screen | 18% |
| Improved access by foot and cycle | 18% |
| Improvements in the built environment | 18% |
| More / better disabled access | 18% |
| More / better signposting and information | 18% |
| More for children | 18% |
| More quality restaurants | 18% |
| More street cleaning | 18% |

Source: CACF, January 2015

5.1 In addition to the above, the Ashford Town Team and Kent Invicta were also contacted as public sector stakeholders. The key views given are summarised below:

- The town centre has a good offer given its size and attractions that draw visitors in, including for example the market.
- The town needs to build up a unique image for itself, possibly by encouraging more independent businesses to locate here.
- Out of centre shopping is affecting the centre.

- Despite a good relationship between the town centre managers and the Designer Outlet, there is a feeling that people would not necessarily choose to visit both destinations in the same day.
- There is support for more marketing of the town centre at the Designer Outlet.

***Private Sector***

5.2 Consultation was also conducted with the key private sector stakeholder in the town centre, which include main high street occupiers Marks and Spencer and Debenhams and also the managers of County Square Shopping Centre.

5.3 Respondents were asked to share their views on the strengths and weaknesses of the town centre, the trends affecting the performance of their store or centre and any suggested improvements that could be made.

5.4 The views expressed during this consultation have been summarised in the table below.

Table 5.9 **Key Private Sector Stakeholder Views on Ashford Town Centre**

| Category | Summary Responses |
|---|---|
| Strengths of the town centre | • Town centre felt to have great potential – generally attractive and a good retail offer, including M&S, Debenhams, County Square Mall.<br>• Pedestrianised areas create a good environment for visitors.<br>• Excellent links into London and Europe through Ashford International.<br>• Farmers market attracting visitors weekly. |
| Weaknesses of the town centre | • The food and beverage offer could be improved and there are few branded leisure occupiers.<br>• Parking and access is difficult, requiring people to navigate complex junctions to get into the town centre.<br>• Signage and marketing of the town centre is poor, particularly when compared to the Designer Outlet Centre.<br>• The centre lacks a sense of identity.<br>• Few late night shopping opportunities as shops close at 5.30/ 6pm.<br>• Areas of the centre appear to be in need of some investment. |
| Trends for the town centre | • There is a trend of declining footfall in key stores and across may areas of the town centre. This trend has been observed over a twelve month period and appears to be worsening.<br>• Increased expenditure has been identified over the last year, suggesting that those that do visit the centre are spending more.<br>• Increasing vacancy has been observed in some areas of the town, particularly long-term vacancies. |
| Relationship between the town centre and the Designer Outlet Centre | • There are few (if any) links between the two.<br>• Some stakeholders view the centre as complementary to the town centre while other consider the centre as direct completion.<br>• The food and beverage offer at the outlet centre has a |

| Category | Summary Responses |
|---|---|
| | concentration of branded occupiers that the town centre lacks.<br>• Serious concerns regarding the extension and the scope for existing high street retailers to move across into the outlet centre away from the town centre. |
| Recommended Improvements for the town centre | • Encouraging more local, high end, independent shops would create a more vibrant, local character.<br>• A better leisure and food/ beverage offer, including a cinema, would attract more people into the centre and encourage people to stay for longer periods.<br>• More late night openings which can improve evening footfall.<br>• Better signposting into the town centre and into the County Square mall are required.<br>• Facilitating events and cultural activity that will bring visitors into the centre and improve footfall.<br>• Improving links between the outlet centre and the town centre, though both marketing and improved public transport links. |

Source: Consultation 2015

## ENVIRONMENTAL QUALITY

5.5 The quality of the public realm in Ashford Town Centre varies. Typically, the historic parts of the centre have higher quality public realm and civic spaces for people use. Elsewhere, amenity space is limited and the overall quality of the public realm is lower, particularly to the north of the centre.

5.6 Ashford Town Centre has an attractive historic character, retaining much of its historic street pattern and contains over 100 listed buildings. In recognition of this and in order to preserve this historic setting, a large conservation area is in place in the centre.

5.7 The TCAAP noted that there is a limited amount of public open space in the Town Centre, with Memorial Gardens serving as the only significant piece of public green space. The TCAAP recommended that links between the centre and out of town open space be improved in order to address this issue.

## OUT OF CENTRE PROVISION

### Ashford Designer Outlet Centre

5.8 The Ashford Designer Outlet is located on the periphery of the town centre, and in close proximity to the main road and rail links into Ashford. The centre currently has around 80 retail stores, with a mix of high street national multiples and several 'premium' retailers (e.g. Ralph Lauren), in addition to a food court, which also consists mainly of national multiple occupiers. There is also an Asda store adjacent to the Outlet Centre.

5.9 Built in 2000, the Designer Outlet has become a major draw for visitors to the town. Key brands that are usually found in a town centre (including Marks and Spencer, Next and Clarks) are located in the Designer Outlet, and it has been identified in the Town Centre AAP as a key competitor for the town centre. Currently, poor pedestrian links serve as a barrier to connectivity between the two, although the current application to extend the Designer Outlet does seek to strengthen the pedestrian links with the station and town centre. The Designer Outlet has seen an improvement in its Venuescore ranking from 326th in 2013 to 293rd in 2014.

5.10 The planning application to demolish part of the existing Designer Outlet and extend the centre, including retail space in addition to restaurants, a visitors' centre and performance space, was submitted in November 2014 (Ref: 14/01402/AS). The current proposals are for a significant extension to the Ashford centre by 13,600 $m^2$, including 7,840 $m^2$ of retail floorspace and 1,620 $m^2$ of restaurant floorspace. This would almost double the existing floorspace of the Designer Outlet (currently around 17,000 $m^2$). There are also aspirations by the owners to change the image of the centre and create a higher value designer offer.

5.11 The household telephone survey asked respondents who visit the Designer Outlet Centre whether they link their trip to Ashford Town Centre for shopping, leisure or other town centre activities. The findings set out in **Appendix 3** show that the majority of respondents that visit the Designer Outlet never link their trip to Ashford Town Centre. For those that do, 10.7% always link their trip to the Designer Outlet with the Town Centre while 9.2% link their trip every other time and 7.9% with every three to four trips.

5.12 The *Retail Impact Assessment* submitted in support of the planning application comprises a face-to-face survey of 400 shoppers at the Outlet Centre carried out in March 2014. The survey showed that:

- 88% of people travel to the centre by car;
- The majority of expenditure is drawn from shoppers living over 45 minutes' drive away (20% of expenditure is within 30 minutes' drive, 24% between 30- and 45 minutes and 56% beyond 45 minutes).
- Those travelling further to the Designer Outlet generally tend to spend more;
- Just 9% of the Designer Outlet's turnover is drawn from within 10 minutes' drive time (i.e. including the Ashford urban area);
- Only 7% of shoppers use the Designer Outlet for their main non-food shopping;
- Within 10 minutes' drive, 54% name Ashford as their main non-food centre, and 13% nominate the Designer Outlet;
- 63% of shoppers visit the Designer Outlet as a special day out and continue to use their normal town centres as often as usual;

- 61% of shoppers who live within 10 minutes' drive continue to use their regular food centre (primarily Ashford) as often as before;
- 40% of visitors also visit Ashford Town Centre on at least some of their visits and just under 10% do so on 'all or most' visits;
- Over 70% of visitors are people who would not otherwise visit Ashford; and
- Suggested improvements include more shops, a greater range of goods and better restaurant / café facilities.

5.13 The findings of the survey results reflect the typical trading characteristics of similar outlet centres in England; particularly in relation to shopper travel times.

**Other Out of Centre**

5.14 The other out-of-centre provision in Ashford (excluding the Designer Outlet), consists of four dedicated retail parks and a number of key out of town stores.

***Retail Parks***

5.15 A short distance from the Designer Outlet, there is a cluster of additional out of centre retailers at Gallagher Retail Park (Norman Road) with an estimated retail floorspace of 3,300 $m^2$ gross. Occupiers include mainly bulky goods/ traditional out of town stores:

- Pets at Home
- Carpetright
- Curry's
- B&Q
- Bensons for Beds
- Halfords

5.16 Ashford Retail Park is largest retail warehouse scheme in Ashford, located to the south east of the town and providing an estimated 18,200 $m^2$ of retail floorspace. Tenants include:

- TK Maxx
- Argos
- Boots
- Currys/ PC World

5.17 Redevelopment of the former Homebase retail unit is currently under way, which comprises the sub-division of the unit to create additional units and the installation of mezzanine floorspace. The units are expected to be occupied by typical retail park tenants.

5.18 Warren Retail Park is located to the north of Ashford Town Centre, off Simone Weil Avenue (A20). This smaller retail park is a cluster of three stores (Staples, Dreams and Family Bargains) with an estimated combined retail floorspace of 3,250 $m^2$.

5.19 As mentioned previously in this section, a dedicated leisure park, Eureka Leisure Park, is located north of Ashford Town Centre. The Leisure Park contains the Borough's only cinema venue (12 screen multiplex) alongside eight restaurants/ takeaways and a health/fitness club. The Leisure Centre also accommodates a Dobbie's garden centre and two hotels (Travelodge and Premier Inn). There is currently a planning application for two new restaurant units (Ref: 14/01495/AS) pending a decision.

***Trade Centre***

5.20 Ashford Trade Centre (Orbital Park) is located in close proximity to Ashford Retail Park, to the south east of the town centre and provides mainly B8/ sui generis type uses. The ancillary retail includes around 12,000 $m^2$ gross retail floorspace. Occupiers include:

- Carpetright
- Orbital Beds
- Bathstore
- Carpets for Less
- Halfords
- Topps Tiles

***Standalone Stores***

5.21 In relation to comparison retail, the two standalone out of town stores in Ashford are a Matalan and John Lewis at Home. Further details are provided below:

- A new **John Lewis at Home** store opened in late 2013, providing 5,390 $m^2$ (gross) of retail floorspace. The store is located in close proximity to Junction 9 of the M20, to the west of the town centre. The store focuses on the homeware and bulky goods ranges and also includes a customer café. It is anticipated that this store will have a significant draw on expenditure in the surrounding area.
- There is a large **Matalan** store to the south of the Town Centre, on Brookfield Road. The store provides around 3,900 $m^2$ of fashion retail floorspace.

5.22 In relation to larger out of town convenience provision (which also includes a proportion of comparison provision), Ashford is served by six main stores, as set out below.

- **Tesco Extra** at Crooksfoot, is located in close proximity to Ashford Retail Park, off the M20. The store provides around 4,248 $m^2$ net sales area, of which 25% is dedicated to comparison goods.
- A second **Tesco Extra** store is trading from the Park Farm Estate (off the A2070), to the south of the Town Centre, and provides around 3,748$m^2$ net sales area of which 20% is dedicated to comparison goods.
- A **Sainsbury's** superstore is located in close proximity to Junction 9 of the M20, to the north of the Town Centre. It provides around 4,268 $m^2$ net sales area, of which 25% is estimated to be comparison goods.
- **Asda** has a superstore on Kimberley Way, adjacent to Ashford Designer Outlet Centre. The store provides around 3,499 $m^2$ net sales area, of which 20% is estimated to be comparison goods.
- A **Lidl** 'deep discounter' supermarket is located on New Street (A292), to the north west of the Town Centre. The store comprises a net sales area of around 557$m^2$.
- There is also a **Waitrose** supermarket is located to the north of the Town Centre. The store trades from a net sales area of approximately 1,652 $m^2$.

**NEW INVESTMENT AND DEVELOPMENT**

5.23 The 2010 TCAAP identified the need for major expansion of the town centre to the south in order to meet growing demand. Ashford Council has identified eight priority projects, of which four lie within the town centre.

- **Elwick Place** is a large vacant town centre site and one of the priority regeneration sites identified by the 2010 Town Centre AAP for mixed use development. In December 2014, plans for the 20,000$m^2$ Phase 1 redevelopment of the site were revealed to include a five screen cinema, 60-bed hotel, a number of bars and restaurants and a new car park. At the time of finalising this report an application had not yet been submitted to the Council.
- There are also plans to develop a '**Commercial Quarter'** to the north of the domestic station. Development of this area will be office-led, including up to 150 new homes, 55,000 $m^2$ of new office space and 2,500 $m^2$ of retail and supporting leisure uses.
- In 2011 a scheme was approved for the demolition of existing buildings on a site opposite Ashford International Rail Station in order to make way for a new campus for **Ashford College**. A revised scheme is being drawn up for the site and the funding package is currently being finalised.

- Plans are in place to create a new performance space for the **Jasmin Vardimon International Dance Academy** in the old Stour centre building, which will include studios, space for creative businesses and related facilities.
-

5.24 Ashford has been designated a 'Portas Pilot' town, as part of which a number of initiatives are being funded to improve the Town Centre. These include:

- revitalising the market;
- developing a *'Love Ashford'* brand;
- creating a website to guide shoppers in the town; and
- improving links between the town centre and the Designer Outlet.

5.25 The Town Team has received £100,000 of funding from the Government, which will also be matched by an additional £100,000 from contributions through planning agreements.

**SUMMARY**

5.26 The 2003 *Retail Study* identified that Ashford town centre was underperforming for a centre of its size. Factors contributing to this included the poor quality of the comparison goods offer, particularly clothing and footwear, and the lack of national multiple retailers. Following the subsequent extension of the shopping centre, the range and quality of comparison retail provision has improved; although the centre would benefit from greater representation from fashion multiples. Overall, the health check conducted as part of this assessment has shown the level of comparison retail to be in line with the UK average (33%), although there is still a relatively limited choice of national multiple brands, particularly for clothing and footwear.

5.27 Our updated health check has identified that Ashford Town Centre has a number of key strengths and opportunities:

- Overall, the Town Centre's comparison retail offer is on par with the UK average for town centres, but requires further investment in order to retain shoppers and compete with other centres.
- The town's retail offer and attraction also benefits from a number of strong retail brands; in particular Debenhams and Marks & Spencer. Their continued presence in Ashford Town Centre is important in retaining existing and attracting new retail multiples to the centre.
- The centre is experiencing a high number of vacant units with 16% of total units in the town centre recorded as vacant in November 2014, which is greater than the national average for town centres (11.5%). The greatest concentration of vacancies is within the two shopping centres.

- Commercial market indicators suggest that although Prime Zone A rental values are still below their pre-recessionary values, they have stabilised which is a good indicator of town centre viability.
- While County Square shopping centre serves as important economic asset for the town centre, it is likely to have influenced the decline of retail and leisure provision along the High Street and Park Mall. If the shopping centres are to be the focus of comparison retail for the centre, then the High Street must have a complementary offer, such as niche independents, leisure, food and drink.
- To provide the Council with greater control on uses within the town centre, it is recommended that secondary frontages are defined along streets directly serving the primary shopping areas, such as those intersecting with High Street (e.g. Bank Street and North Street).
- The redevelopment of Elwick Place to include a new multi-screen cinema will be fundamental to the future vitality and viability of the town centre, and should also act as a key catalyst for wider investment in the town centre. It should therefore be prioritised and promoted as a priority. The proposed cinema should also help to generate customer links with Ashford Designer Outlet.
- The Ashford Designer Outlet is generating some linked trips to the Town Centre (e.g. 10.7% visit the Town Centre every time they visit the Designer Outlet), and has the potential to create more net additional trips to the Town Centre.
- New amenity space and improved public realm as part of wider town centre improvements will help to enhance the attractiveness of the centre as a place to visit, in turn improving the attraction of the centre to investors/ retail operators.
- Improvements identified by the stakeholder consultation and the HTIS include a better range of comparison shops, particularly more national multiple high street brands; improved car parking and fewer vacant units. A high proportion of people also identified demand for the provision of additional leisure facilities including another cinema and a new theatre.
- Ashford has a significant amount of out of town retail, provided in the form of standalone stores, retail parks and the Designer Outlet. The large out of town convenience superstores also provide comparison goods floorspace.
- There is a qualitative need for an anchor foodstore in the Town Centre to help generated increased trips, footfall and linked expenditure to the town's other shops, business and facilities. However, this will depend on the market appetite from occupiers to take space in the town given the level of competition outside the centre and the fact that the major grocers are drawing back from major new superstore development across the UK.

# 6.0 TENTERDEN TOWN CENTRE: HEALTH CHECK

## RETAIL CONTEXT

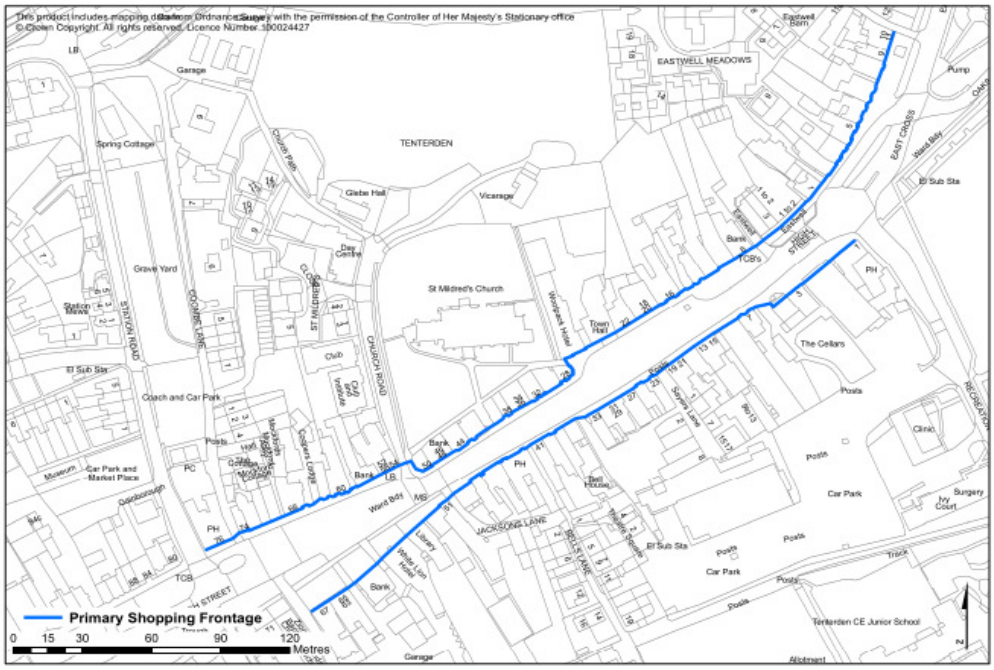
6.1 Tenterden town is a traditional rural market town located in the south-west of the Borough and is identified as the main rural service centre, as identified in the *Tenterden and Rural Sites DPD 2010*.

6.2 It offers a range of retail and service uses in an attractive historic environment centred on a linear High Street, and predominantly meets the needs of its local catchment population, as well as visitors and tourists.

6.3 The range and quality of the shops and services provided by the High Street and surrounding lanes is particularly good, given the relative size of Tenterden town. The number of specialist shops and higher quality occupiers reflects the affluent nature of the catchment population and the significant draw of visitors and tourists.

6.4 The main thoroughfare in the town centre is focussed at the narrow eastern end of the High Street. Primary frontages have therefore been defined for Tenterden as Station Road to East Cross and Webb's shop to Recreation Ground Road. This is shown in the map below.

Figure 6.1 **Tenterden Town Centre map**




Source: Tenterden and Rural Sites DPD

## RETAIL COMPOSITION AND DIVERSITY

6.5 A site visit and audit was undertaken by Carter Jonas in December 2014 to identify the current uses and occupiers along the primary shopping frontages in Tenterden[23]. Based on this audit the table below shows the changes in the composition and diversity of the town's retail and service outlets over the past six years, from 2008 to 2014.

Table 6.1 **Tenterden: Change in Retail Composition by Outlets, 2008- 2014**

| Category | 2014 (units) | 2008 (units) | Change | 2014 (%) | UK Average (%) |
|---|---|---|---|---|---|
| Convenience | 1 | 1 | 0 | 1% | 8% |
| Comparison | 40 | 37 | 3 | 53% | 33% |
| Service | 16 | 15 | 1 | 21% | 25% |
| Leisure | 14 | 15 | -1 | 18% | 22% |
| Residential | 1 | 0 | 1 | 1% | N/A |
| Vacant | 4 | 4 | 0 | 5% | 11% |
| **Total** | 76 | 72 | 4 | 100% | 100% |

Source: Tenterden Town Centre Surveys 2008 and CJ surveys 2014
Note: National Benchmarks taken from Experian Reports 2014

6.6 The survey data shows that there has been little change in the composition of the High Street over the past six years, although the detailed survey data does show that occupiers have changed in a number of cases. The increase in the number of units is due to a change in the area mapped as the primary frontage for each survey, which has increased the number of units to be included in the High Street frontage. One retail unit was also converted to residential use.

6.7 The High Street is particularly well represented by comparison retailers, which range from niche specialists to multinational occupiers (including Monsoon, Fat Face and Crew Clothing). Over half of the High Street units are occupied by comparison retailers, although it should be noted that a number of the larger stores occupy several units. This includes the former Webbs of Tenterden unit which was destroyed by a fire in November 2013 and is currently under refurbishment. There are a number of antiques stores and gift shops concentrated at the southern end of the High Street, which are more geared towards the visitor/ tourist market.

6.8 Although convenience provision is limited on the High Street, with just one store (Holland and Barrett), the Waitrose store located on Sayers Lane, off the south side of the High Street, gives a good level of provision with a range of goods and seven checkouts. A Tesco Superstore is located outside of Tenterden's main shopping area at

[23] The audit of occupiers covers the primary retail street (ie. High Street) only, as shown in Figure 6 1.

Highbury Works, but within a short walking distance of the High Street. For the purpose of this study the store is considered to be edge of centre.

6.9 It should be noted that policy TRS15 in the *Tenterden and Rural Sites DPD* promotes the dominance of A1 uses along the High Street frontage, stating that non A1 uses should make up no more than 35% of the frontage in order to conserve the economic vitality of the High Street. In many smaller town centres, the level of A1 provision has been eroded in recent years by service and leisure uses, which are often used to fill less popular or vacant units. It appears from the most recent survey that this has not been the case in Tenterden, which has been successful in maintaining a good level of A1 provision and attracting high quality businesses and brands.

6.10 There is a good choice of service and leisure uses along the High Street, including a number of cafés, coffee shops and restaurants (such as Prezzo and Café Rouge). Notwithstanding this, current provision is some 4% lower than the UK average. There may therefore be scope to improve the range and quality of the food and beverage offer in Tenterden where appropriate to cater for both its local catchment, and the strong tourist and visitor market.

## VACANCY LEVELS

6.11 The vacancy levels (measured by outlets) recorded by the Council as part of their Town Centre surveys was updated in 2014 as part of this study. As the table below shows, there were four vacant units across the town centre, giving a vacancy rate of 5%, which is significantly below the national average of 11.5%.

Table 6.2 **Tenterden: Change in Vacancy Rates by Outlets, 2008 - 2014**

| Date | 2008 | 2014 | Change | UK Average |
|---|---|---|---|---|
| Number of units vacant | 4 | 4 | 0 | N/A |
| % units vacant | 5% | 5% | 0 | 11.5% |

Council and CJ Surveys conducted in 2008 and 2014

6.12 Discussions with local agents indicated that the presence of vacant units along the High Street is a relatively recent trend, but these are not thought to be long term vacancies as demand for units along the High Street remains buoyant.

6.13 Although low vacancy levels are often interpreted as a sign that a centre is performing strongly, it may also mask the fact that there is a limited supply of new floorspace to meet the needs of retailers and businesses seeking representation in the town centre. It may therefore be that case that retailer/ occupier demand is high and that the floorspace required to meet this demand is not currently available.

## RETAILER REQUIREMENTS

6.14 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The latest *CoStar Report* recorded just three requirements for Tenterden in December 2014; representing a total maximum floorspace requirement of 1,078 $m^2$ gross[24]. Those retailers identified all had requirements for the high street including Steamer Trading, C&H Fabrics and Lloyd Pharmacy. However, Tenterden Town Centre offers a stronger mix of independent retailers than, say Ashford Town Centre. As CoStar only record requirements for retail and leisure multiples they are likely to under-estimate the level of requirements for Tenterden. This is evident from the low level of vacancies identified for the centre, which is an indication of market demand for units in the town centre.

## PRIME ZONE A RETAIL RENTS

6.15 Although there is limited information on retail rents in the area, discussions with local property agents on recent deals indicated that Prime Zone A retail rents in Tenterden town centre have fallen from a pre-recession peak of around £700 per $m^2$ to the current level of between £592 per $m^2$ and £667 per $m^2$. Notwithstanding this, Prime Zone A's are relatively buoyant for a centre of its size, and reflect the strength and attraction of its shopping offer and the limited supply of units.

## ACCESSIBILITY & PEDESTRIAN FLOWS

6.16 Tenterden is a rural town centre, located within an area of sparsely populated countryside with few towns. Ashford is the closest large town and is located over 12 miles to the north.

6.17 Public transport connections rely on bus services between Tenterden and the larger towns of Headcorn, Ashford, Maidstone and Tunbridge Wells. The closest mainline railway station is 9 miles away at Headcorn, which has a regular service to Charing Cross. Ashford International station is 12 miles from Tenterden and has regular High Speed services from London St Pancras and Eurostar services.

6.18 By road, Tenterden is connected by the A28 which runs between Hastings and Ashford. The M25 can be reached by car in around an hour.

[24] Recorded by CoStar Focus in December 2014.

## CUSTOMER VIEWS AND PERCEPTIONS

### Household Survey

6.19 The household telephone interview survey asked specific questions on respondents' views and perceptions of Tenterden Town Centre. The survey results showed that respondents liked the following features of Tenterden Town Centre.

Table 6.3 **Feature respondents liked about Tenterden Town Centre**

| Response | Study Area |
|---|---|
| Attractive environment | 46% |
| Good range of non-food shops | 23% |
| Traditional | 21% |
| Nothing/ very little | 8% |
| Good independent shops | 6% |
| Close to home | 6% |

Source: HTIS, July 2014

6.20 When asked what, if anything, respondents would improve in Tenterden Town Centre that would encourage them to visit more, the majority in each zone stated '*nothing or very little'* (71% across the whole Study Area). This high proportion indicates a general satisfaction with the current town centre. The table below provides a summary of the most frequently raised suggested improvements for the town centre.

Table 6.4 **Key Improvements for Ashford Town Centre**

| Response | Study Area |
|---|---|
| Nothing | 71% |
| More/ better car parking | 13% |
| Free car parking | 9% |
| More national multiple shops / High Street shops | 5% |

Source: HTIS, July 2014

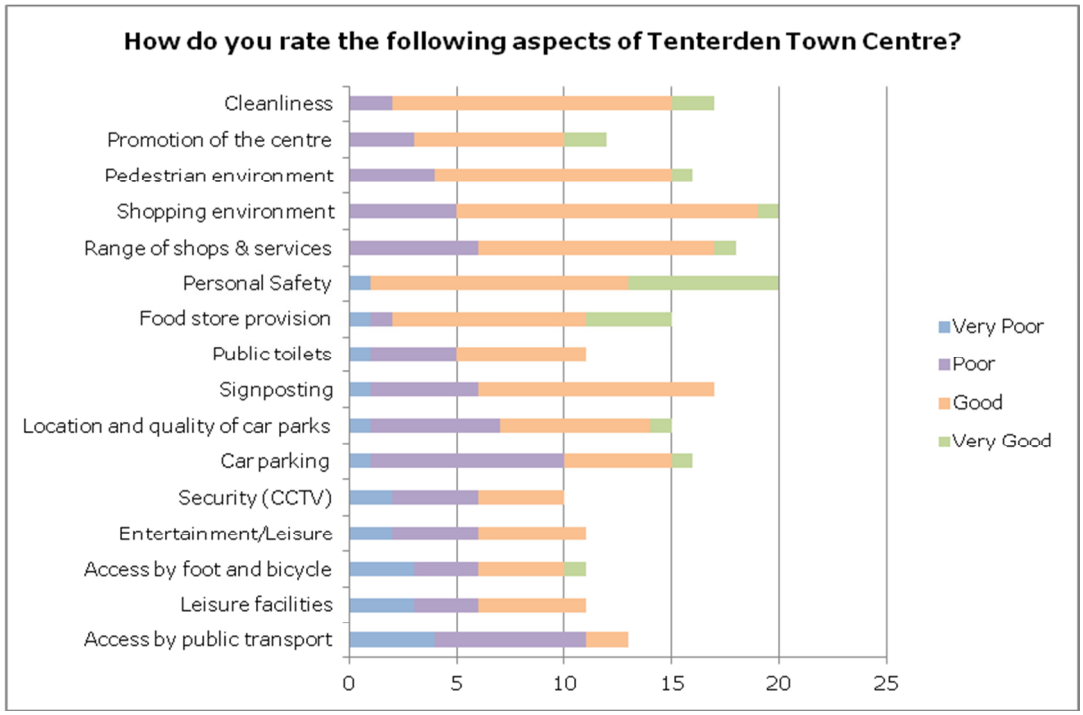
6.21 Across the whole Study Area, the improvements considered most important were those relating to parking. Respondents also highlighted a desire for free car parking or more/ better car parking in the Town Centre. '*More national multiple shops/ High Street shops*' was also considered to be important.

### Stakeholder Consultation

6.22 Tenterden Chamber of Commerce and Tenterden Town Council were surveyed with regard to their views on Tenterden Town Centre. Consultees were asked to rate the Town Centre on its best and worst features and suggest improvements.

6.23 The figure below provides a summary of how respondents rated various aspects of the town centre from very good to very poor. As the figure shows, the centre's shopping environment, foodstore provision and range of shops/ services was the best rated aspect of the town centre while public transport access, parking provision and leisure/entertainment provision was rated as very poor.

Table 6.5 **Ratings for Tenterden Town Centre**




Source: Tenterden Chamber of Commerce and Tenterden Town Council, January 2015

6.24 Respondents were asked what improvements they would like to see made to Tenterden Town Centre. In general, respondents were primarily concerned about the number of charity shops in the centre; about issues of parking control; the level of business rates and the need for improved leisure facilities (for example, a cinema). The most popular responses were:

Table 6.6 **Key Improvements for Tenterden Town Centre**

| Improvement | Response % |
|---|---|
| Fewer charity shops in prominent retail positions | 65% |
| More smaller independent and specialist shops | 61% |
| Increased choice / range of shops | 57% |
| More / better car parking | 48% |
| More / better policing | 43% |
| Improved access by foot and cycle | 30% |
| More / better restaurants | 30% |
| Improved public transport | 26% |

| Improvement | Response % |
|---|---|
| More / better cultural facilities | 26% |
| More / better entertainment facilities | 26% |
| More entertainment / leisure facilities | 26% |

Source: Tenterden Chamber of Commerce and Tenterden Town Council, January 2015

6.25 Respondents were also asked which centres are the biggest competitors for Tenterden Town Centre. The key competitor towns identified by the Tenterden Chamber of Commerce were Ramsgate, Dover, Gillingham, New Romney, Chatham, Eastbourne and Aylesford.

**ENVIRONMENTAL QUALITY**

6.26 Tenterden is an attractive town with a well maintained historic built heritage. The public realm along the High Street is well maintained and presents an attractive environment for shoppers. The stakeholder consultation also confirmed that shoppers generally identify the shopping environment in Tenterden as a key strength.

**NEW INVESTMENT AND DEVELOPMENT**

6.27 A development is planned to the south of Tenterden which will include 250 new homes (Ref: 14/00757/AS). In October 2014, Ashford Borough Council resolved to grant planning permission, providing the terms of the Section 106 agreement can be agreed. Once the decision is made, work is anticipated to start on site in summer 2015. The site is part of a larger area identified for the delivery of 475 homes in total, of which this is the first phase. The site has been selected as it has good links to the existing high street shops and facilities, and will bring with it an increase in expenditure once it is developed.

**SUMMARY**

6.28 Tenterden Town Centre performs strongly for a town of its size, role and function. Notably, it has a distinctly different offer in terms of retail and leisure provision to Ashford Town Centre. Key findings relating to the Town Centre's strengths, weaknesses and opportunities are set out as follows:

- Tenterden serves as an important rural town centre and also benefits from a steady tourist market; promoted by the centre's niche comparison retail offer.
- Overall, the town's comparison retail offer is well above the UK average, while the number of units for leisure and service uses is just below the UK average.

- The location of two supermarkets in the town centre (and edge of centre) assists in maintaining the centre's relevance as a rural service centre. As such, applications for out of centre convenience provision should be resisted.
- The number of vacant units in the centre has remained unchanged since 2008 and vacancy levels are currently below the UK average for town centres. Over the same period, the number of comparison units and service units has increased (+3 and +1, respectively).
- The town centre benefits from an attractive and well maintained shopping environment that enhances the centre's historic setting and attraction to shoppers, visitors and tourists.
- To ensure a continued presence of comparison retail offer on the High Street, leisure uses including food and beverage should be promoted off the main high street. This in turn will encourage active frontage along secondary streets such as Market Square, Sayers Lane and Sayers Square.
- Although only one retail unit has been converted to residential, the town centre is an attractive/ high value residential area. It is therefore recommended that the Council closely monitors Permitted Development applications. This could be achieved through the increased designation of areas as protected frontages (for example Primary Shopping Frontages).
- It is recommended that primary frontages identified in the Tenterden and Rural Sites SPD remain unchanged.
- Tenterden appears to be underserved by public transport particularly compared to Ashford Town Centre. This was identified as a key weakness in the stakeholder consultation. Any potential to improve public transport links, such as improved local public bus access, should be promoted wherever possible as part of new development schemes coming forward in the area.

# 7.0 QUANTITATIVE RETAIL NEEDS ASSESSMENT

## INTRODUCTION

7.1 This section sets out the assessment of the quantitative need (capacity) for new retail (comparison and convenience goods) floorspace in Ashford Borough from 2015 (the 'base year') to 2030 (the 'design year'), broken down into five year periods (i.e. 2020, 2025). This assessment updates and supersedes the findings of previous retail capacity assessment for the Borough (2003 Retail Study).

7.2 In simple terms the quantitative capacity for new retail floorspace is generally derived from the forecast growth in population and expenditure, after making an allowance for new commitments, and the increased 'productivity' (or 'efficiency') of all existing and new floorspace. Capacity can also occur where there is a clearly identified "*imbalance*" between the turnover of existing facilities and the current level of expenditure in an area.

7.3 The **CREAT$^{e}$** model has been specifically developed by Carter Jonas ('CJ') over a number of years to assess the capacity for, and impact of new retail (convenience and comparison goods) development and investment. The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice advice. The model draws on the market share analysis derived from the household telephone interview survey to help identify shopping patterns and expenditure flows across the defined Study Area. In turn this helps to inform the assessment of the current turnover and trading performance of existing centres, shops and stores at the base year.

7.4 The baseline assumptions and forecasts underpinning the **CREAT$^{e}$** model are based on robust evidence, research and best practice. For example:

- The base year (2015) population and projections up to 2030 have been informed by the latest sub-national population projections based on the 2011 Census, which are derived from the MMG3 Geographic Information System (GIS). These are comparable with the population projections the Council is using to inform planned future growth in the Borough which will feed into the new Local Plan.
- The average retail (convenience and comparison goods) expenditure per capita levels by zone, derived from Experian's MMG3 GIS (please note all expenditure and turnover figures are expressed in 2013 prices).
- The annual growth forecasts for (convenience and comparison goods) expenditure per capita have been informed by Experian's latest *Retail Planner Briefing Note 12.1* (October 2014), as described in Section 3 (Table 3.1).
- The market share for 'non-store' retail sales (otherwise referred to as Special Forms of Trading) has been deducted from the expenditure per capita figures at the

outset of the capacity assessment. The base year (2015) SFT figures for both convenience and comparison goods have been interpolated from the market shares derived from the recent household telephone interview survey. The forecast growth in SFT up to 2030 is in line with the national forecasts set out in Experian's latest Briefing Note (also see Section 2).

- The increased 'productivity' of retail (convenience and comparison goods) floorspace across Ashford Borough over the forecast period informed by Experian's *Retail Planner Briefing Note 12.1: Addendum* (October 2014) (also see Section 2).

7.5 The Council should be made aware at the outset that long-term capacity forecasts are inherently less certain and should therefore be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a five year period (see NPPG, para 003). Notwithstanding this, the Council will also need to take account of the forecast capacity for new retail floorspace over the lifetime of the development plan, as the NPPF (para 23) states that local planning authorities should meet the need for retail and town centre uses in full, including the potential need to expand town centres to ensure a sufficient supply of suitable sites.

7.6 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in **Appendix 7A** and in **Appendix 8A** respectively. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the **CREAT$^{e}$** Model are described in more detail below.

## POPULATION AND EXPENDITURE FORECASTS

### Population Projections

7.7 **Table 1** (Appendix 7A) sets out the base year (2015) population and projections. It also shows the population projections to 2030 for each study zone based on Experian's '*demographic component model'*, which takes into account age, gender, birth rates, ageing, net migration and death rates. Experian's population projections are based on ONS's 2012-based Sub-National Population Projections which show a +12.3% growth for the Study Area as a whole between 2015 and 2030, from 268,792 to 301,821 (+33,029).

7.8 For the zones that comprise the Ashford Borough area only (i.e. Zones 1 to 4), Table 1 (Appendix 7A) shows a projected increase in population over the study period ranging from to 14.2% for Zone 4 (Tenterden area), to 14.9% for Zones 1a and Zone 1b combined (Ashford urban area).

### Expenditure Per Capita and Special Forms of Trading (SFT)

7.9 Table 2 sets out the average expenditure per capita estimates for both convenience goods (**Appendix 7A**) and comparison goods (**Appendix 8A**) in 2015 (based on 2013 prices) for each of the nine study zones before an allowance is made for *Special Forms of Trading* (SFT)[25]. The 2015 average expenditure figures have been derived from our in-house Experian MMG3 Geographic Information System (GIS).

7.10 Our assessment of the most robust and appropriate allowance for SFT at the base year has been informed by the results of the household telephone interview survey completed in 2014. Therefore, the following analysis on base year market shares refers to 2014 data to reflect the timing of the household survey. The market share analysis (**Appendix 5**) shows that some 17.1% of all comparison goods expenditure in the defined Study Area was accounted for by internet and non-store sales (including mail order purchases) in 2014. For convenience goods SFT accounted for 6.3% of total available expenditure in the Study Area (**Appendix 4**).

7.11 These survey-derived market share figures have been compared with the national figures published by Experian in their latest *Retail Planner Briefing Note 12.1* (October 2014) based on data published by the Office for National Statistics (ONS). The national average figures show a lower market share for comparison goods (15.6%) in 2014 and a higher market share for convenience goods (8.4%).

7.12 The base year SFT market shares have necessarily been adjusted downwards in accordance with accepted approaches to reflect the fact that a proportion of online sales are still sourced from traditional stores rather than from dedicated ('dotcom') warehouses. Drawing on Experian's latest research we have assumed that some 25% of SFT comparison goods sales and 70% of convenience goods sales are sourced from traditional ('physical') retail space. This reduces the survey-derived market share of SFT across the Study Area to 12.0% for comparison goods in 2014 and to 1.6% for convenience goods. As Table 2 (Appendix 8A) shows, Experian's national figures show a slightly lower market share for comparison goods of 11.7% and a higher market share for convenience goods of 2.6% (Table 2, Appendix 7A) in 2014.

7.13 Our forecasts of the likely growth in SFT up to 2030 for both convenience and comparison goods are in line with the forecasts published by Experian in their latest *Retail Planner Briefing Note 12.1* (October 2014). After discounting online sales sourced from stores (described above) from the SFT market share identified by the household survey and applying SFT growth rates identified by Experian; we forecast a market share of 16.0% for comparison goods in 2030. This compares with Experian's forecast of 15.6%. For convenience goods our forecast market share of 3.4%; lower than Experian's figure of 5.4%.

[25] SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

### Average Expenditure Growth Forecasts

7.14 The growth in average expenditure per capita levels up to 2030 has been informed by the forecasts set out in Experian's latest *Retail Planner Brief Note* (Figure 1a). As described in more detail in **Section 3**, Experian's forecasts show for:

- **convenience goods** - limited growth in average expenditure over the short term up to 2016 (+0.4% in 2015 and +0.5% in 2016), with year-on-year growth thereafter forecast to average +0.6%; and
- **comparison goods** - stronger forecast annual growth over the short term (+4.4% in 2015 and +3.1% in 2016), with growth averaging +3.2% per annum up to 2028. This forecast growth is lower than historic '*ultra*' long (1973-2013) and '*medium*' term (1993-2013) trends of +4.5% and +5.9% respectively.

### Total Available Expenditure

7.15 Total available retail expenditure in the Study Area is derived by multiplying the population and average expenditure per capita levels together. The forecasts show:

- a 20.6% (+£118.0m) growth in total **convenience goods** expenditure from £573.9m in 2015 to £691.9m by 2030 (Table 3, **Appendix 7A**); and
- a 74.0 % (+£649.3m) growth in total **comparison goods** expenditure from £877.4m to £1,526.6m between 2015 and 2030 (Table 3, **Appendix 8A**).

7.16 The growth in comparison goods expenditure significantly outstrips convenience goods spend, which means that there should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods. This assumes no changes in the key forecasts (i.e. expenditure, population and special forms of trading) and before taking into account new commitments and an allowance for the increased 'productivity' of all existing and new floorspace.

7.17 Focusing on the study zones that comprise Ashford Borough (Zones 1 to 4), Table 3 (**Appendix 7A and 8A**) shows a higher growth in total available expenditure for Zones 1 and 2 (broadly corresponding to the Ashford urban area) of approximately +77.8% for comparison and +23.3% for convenience over the plan period (up to 2030). This corresponds to higher growth in population and expenditure per head for the Borough as discussed previously.

### MARKET SHARE ANALYSIS

7.18 **Section 4** described the headline results of the survey-derived (%) market share analysis (including SFT) based on the detailed tabulations set out in **Appendix 4** for convenience goods and **Appendix 5** for comparison goods.

7.19 For the purpose of the retail capacity assessment, and in accordance with good practice, the market shares (including SFT) have been adjusted for both convenience goods (Table 4, **Appendix 7A**) and comparison goods (Table 4, **Appendix 8A**) retailing to exclude SFT[26].

7.20 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres, stores and floorspace based on the survey-derived market shares (%). This helps to establish the current '*baseline*' (2015) trading performance for the main centres and stores across Ashford Borough based on expenditure drawn from the Study Area. It should be noted that no allowance is made at this stage for the potential "*inflow"* (trade draw) of expenditure to centres and stores from outside the defined Study Area.

7.21 For both convenience and comparison goods the 'baseline' turnovers are projected forward 2020, 2025 and 2030 assuming no changes in market shares. This *'constant market share approach'* is a standard approach widely used and accepted for strategic retail assessments. However, the Council will be aware that it is a highly theoretical approach as it does not, for example, take account of the potential impact of new retail investment and development (both within and outside Ashford Borough) on existing shopping patterns and market shares over time.

7.22 The following briefly reviews the trading performance of the main centres (i.e. Ashford and Tenterden Town Centres) and stores in the Borough area, as well as competing centres within and outside the Study Area based on the market share analysis.

### Convenience Goods

7.23 Tables 4 and 5 (**Appendix 7**) show that, after stripping out the market shares for SFT, all the food and convenience stores in Ashford Borough are currently achieving a market share of 49.5% across the whole Study Area. This means that they are retaining some £287m of all the available expenditure (i.e. £573.9m) in 2015.

7.24 Based on zones that broadly comprise Ashford Borough (Zones 1 to 4), the market share increases to 89.1%, which is equivalent to £245.4m of total available expenditure for Zones 1 to 4 (£275.3m). This high level of retention is expected for convenience expenditure and reflects the general trend for people to shop at their local, more convenient foodstores and convenience outlets.

7.25 The market share of stores in the Borough is highest in Zones 1a and 1b (Ashford urban area) at 97.2% (£66.5m) and 93.7% (£68.9m), respectively. This is explained by the strong out of centre foodstore offer serving the Ashford urban area. The convenience

[26] The is in accordance with the standard approach for retail assessments, which make a deduction for SFT at the outset from the expenditure per capita figures.

market share is 'lowest' in Zone 2 at 78.9% (£35.6m), which reflects the increasing competition with foodstores in nearby competing centres (e.g. 4.2% in Hythe).

7.26 The forecast changes in the turnover (£ million) of Ashford and Tenterden Town Centres and stores across the Borough at 2020, 2025, and 2030 are set out in Tables 6-8 of Appendix 7A. As explained above these turnovers have been derived by applying constant market shares (Table 4, Appendix 7A) to the growth in total available expenditure (Table 3, Appendix 7A).

### Comparison Goods

7.27 For comparison goods, Tables 4 and 5 (**Appendix 8A**) show that all the centres and shops within Ashford Borough are retaining some 45.9% (£402.3m) of the total available comparison goods expenditure in the Study Area in 2015 (i.e. £877.4m). Within the zones that broadly comprise the Borough area (Zones 1 to 4), expenditure retention increases to 73.1% (£312.9m) of total expenditure (i.e. £427.8m).

7.28 The strongest market shares and 'retention' levels are achieved by Ashford Town Centre at 25.1% (£231.1m) of total Study Area expenditure. The Town Centre's market share increases to 44.9% in Zones 1-4.

7.29 Edge and out of centre stores in the Borough (including Ashford Designer Outlet) attract 14.9% (£136.6m) of total Study Area comparison expenditure, increasing to 21.2% (£90.8m) within Zones 1 to 4. As discussed in Section 4 of this report, the Ashford Designer Outlet attracts some 5.0% (£45.7m) of total expenditure in the Study Area, with a market share of 5.1% (£22.0m) in Zones 1-4. This suggests that the Designer Outlet is not a key competitor to Ashford Town Centre when compared against overall leaked expenditure from the Borough (26.9% of total expenditure from Zones 1 to 4).

7.30 Looking at other centres in the Borough, Tenterden Town Centre accounts for £26.0m (2.9%) of total Study Area expenditure. The Town Centre achieves the highest market share in Zone 4 of 21.3% (£18.7m). Other smaller centres and shops in the Borough attract less than one percent (0.9% or £8.6m) of total Study Area expenditure, increasing to 1.5% (£6.6m) from Zones 1 to 4.

7.31 Tables 6-8 (**Appendix 8A**) set out the forecast expenditure (£ million) allocated to the Borough's main centres and stores based on constant market shares at 2020, 2025 and 2030.

### 'INFLOW' AND BASE YEAR TURNOVER ESTIMATES

7.32 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores across the Borough we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the Study Area. In the absence of detailed turnover and trade draw information for the centres and stores in Ashford Borough, our judgements have been informed by previous studies and

retail assessments, as well as the survey and health check evidence[27]. The '*inflow*' assumptions also take account of:

- the scale, offer and location of all existing centres and stores in the Borough;
- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the Borough and the wider Study Area; and
- the likely retail expenditure derived from people who live outside the Study Area (including visitors and commuters) to main centres and stores in the Borough.

7.33 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that Ashford and Tenterden Town Centres, and the larger out-of-centre shopping parks will draw a certain proportion of their shoppers and trade from outside the defined Study Area.

7.34 For Ashford Town Centre we have assumed a reasonable inflow of 5% from outside the Study Area. This takes into account the scale and quality of Ashford's shopping offer, and the level of competition from other centres and major out-of-centre retail destinations in the Study Area and beyond (e.g. Canterbury). We have also assumed that Tenterden achieves a 5% inflow, which reflects its more specialist role and the fact that it draws visitor and tourist expenditure. Smaller centres and local shops will draw the majority of their shoppers and trade from within their more localised catchments. Therefore we have assumed no '*inflow*' from outside the Study Area.

7.35 We estimate that Ashford Designer Outlet will draw a higher proportion of its turnover from outside the Study Area. Based on our knowledge of the trading performance of factory outlet centres elsewhere in the UK, research shows that while these types of facilities typically attract infrequent shopping visits, they generally have wide catchment areas extending beyond a thirty minute drive time, and often draw shoppers and visitors from further afield depending on the scale, quality and mix of their retail offer. In this case the visitor survey commissioned by McArthur Glen in support of the planning application to extend the centre highlights that the majority of shoppers travel between 30 to 45 minutes (70%) to shop at the Designer Outlet, with the remainder travelling less than 30 minutes. As the Study Area for this assessment corresponds to a 30 minute drive time, we have therefore assumed an 'inflow' of expenditure to the Designer Outlet of 60%.

7.36 For convenience goods it has been assumed that there is no net 'inflow' of expenditure from outside the defined Study Area due to the scale, quality and location of competing food and convenience stores in neighbouring areas.

[27] This includes the market share and trade draw pattern identified by the Council's *2003 Retail Study* and the results of a visitor survey commissioned by McArthur Glen in support of the current proposal to extend the Designer Outlet.

7.37 Based on the (survey-derived) market analysis and the 'inflow' assumptions, Table 9 (**Appendix 7A and 8A**) sets out the revised convenience and comparison goods turnover estimates for the main centres and stores across Ashford Borough.

## RETAIL COMMITMENTS

7.38 In terms of retail commitments, Table 10 (**Appendix 7A**) for convenience goods and Table 10 (**Appendix 8A**) for comparison goods identify the major foodstores and non-food retail floorspace with planning permission based on information provided by Ashford Borough Council. Our assessment of the size and trading characteristics of these commitments has been informed by the evidence submitted in support of the planning applications, and our own informed judgements. The main commitments are:

**Ashford – Edge of Centre**

7.39 **The Panorama, Park Street (ref: 11/00396/AS):** Planning permission was granted for the conversion of Charter House for residential units and up to 3,581 m² (gross) of flexible commercial floorspace (Use Classes B1 office, A1 retail, A2 financial and professional, A3 restaurant, D1 community). For the purpose of this assessment we have assumed that approximately a third of the commercial floorspace will be occupied by comparison retailer(s) (1,194 $m^2$). We have then assumed a net sales area of 836m2 (i.e. 70% of gross floorspace). Based on an average comparison retail sales density of £4,500 per $m^2$ this equates to a turnover of £4.2m by 2020.

7.40 **Land at junction of Dover Place and Station Road (ref: 11/00382/AS)**: Permission for a mixed use development including 446 $m^2$ (net sales) of retail floorspace. It is assumed that the planned retail floorspace will accommodate comparison retail operators. Based on an average comparison retail sales density of £4,500 per $m^2$ this equates to a turnover of £1.8m by 2020.

**Tenterden – Edge of Centre:**

7.41 **Extension to Tesco Store, Smallhythe Road, Tenterden (ref**: 10/01036/AS): Planning permission was granted for a 1,727 $m^2$ (gross) extension to the existing foodstore. The net sales area is estimated at 1,209 $m^2$, based on a convenience to comparison goods floorspace ratio of 70:30. Assuming a reasonable company average sale density for convenience goods of £10,750 per $m^2$ in 2015, we estimate that the foodstore will achieve a total convenience turnover of £9m by 2020. The comparison turnover of the planned extension is estimated at £2.2m based on a comparison sales density of £4,500 per $m^2$.

**Ashford Borough – District/Local Centres:**

7.42 **Proposed Foodstore, Cheeseman's Green (ref: 02/00278/AS):** Outline planning permission was granted a new community including a local centre. A broad range of commercial uses will be provided for including retail, leisure, office and live/work units. A masterplan for the site identifies a 3,500 $m^2$ foodstore to serve future residents. On this basis we have assumed a net sales area of 2,450$m^2$ (i.e. 70% of gross floorspace). Of this total we have assumed that 70% (1,715 $m^2$) of the store's net floorspace will be for the sale of convenience goods and the remainder (735 $m^2$) for comparison goods. In assessing the planned store's convenience goods turnover, we have assumed an average sales density for a foodstore at £12,250 per $m^2$ in 2015, which equates to an estimated turnover of £20.8m in 2020.

7.43 **Chilmington Green District and Local Centre (ref: 12/00400/AS):** The Council has resolved to grant outline planning permission subject to the completion of Section 106 requirements for a new community comprising 5,750 new homes. The new population will be served by a new District Centre and Local Centre. An Area Action Plan was produced for the site which sets out indicative floorspace for retail uses. The District Centre will include a 3,100$m^2$ foodstore and up to 4,595 $m^2$ of A1 to A5 floorspace. In considering the foodstore we have assumed a net sales area of 2,170$m^2$ (i.e. 70% of gross floorspace). Of this total we have assumed that 70% (1,519 $m^2$) with the remainder for the sale of comparison goods (735 $m^2$). We have assumed that 50% (2,298 $m^2$) of the other retail floorspace is for A1 use equating to a net sales area of 1,608 $m^2$ (i.e. 70% of gross floorspace). Of this total we have assumed that 60% (965 $m^2$) of the net sales are will be occupied by comparison retailers and the remainder (643 $m^2$) for convenience retailers. The AAP also identifies up to 850 $m^2$ retail uses (A1 to A5) within the planned Local Centre equating to an assumed net sales area of 298$m^2$. We have assumed that 60% (179 $m^2$) of this floorspace will be occupied by comparison retailers and the remainder (119 $m^2$) by convenience retailers.

**Ashford Borough - Out of Town/Centre:**

7.44 **Unit B, Beaver Industrial Estate, Beaver Road (ref: 12/01295/AS)**: Planning permission was granted for the development of three retail units totalling 3,375 $m^2$ (gross internal floorspace) of comparison retail floorspace (including mezzanine space) on the former McLaren Foods site. The *Planning and Retail Statement* submitted in support of the application identifies the combined net sales area of the units at 3,121 $m^2$, which is intended for the sale of 'bulky goods' retail. On this basis we have assumed an average sales density of £4,500 per $m^2$ in 2015, which compares to the proposed sales density applied in the supporting *Planning and Retail Statement*. We note that the *Planning and Retail Statement* states that the entirety of the mezzanine area 1,463 $m^2$ (gross) will be sales area. It is accepted that mezzanine floors trade at 50% of the average sales density. Therefore, a sales density of £2,250 per $m^2$ is applied to the

mezzanine floorspace. In total, the planned bulky goods floorspace is estimated to generate a turnover of £11.9m by 2020.

7.45 **Precinct 13, Ashford Road (ref: 13/00427/AS):** Planning permission was granted for a mixed use scheme including retail, office and residential uses. The retail floorspace is estimated at 176 $m^2$ (gross) equating to a sales area of 123$m^2$ net (70% of gross). For this assessment it is assumed that planned retail floorspace will be occupied by a comparison retail operator. The sales density is estimated at £5,500 per $m^2$ in 2015, which equates to a turnover of £0.5m.

7.46 Planning permission was also granted for the installation of mezzanine floors at **Unit 2 (Homebase) Ashford Business Park (ref: and Unit 8 Warren Retail Park, Sevington (ref:** 13/00631/AS). Permission was granted for the installation of a 465 $m^2$ (gross) mezzanine floor at each location; equating to a net sales are of 326 $m^2$ (70% of gross). The average sales density of bulky goods comparison floorspace is estimated at £4,500 per $m^2$ and we have discounted this figure by 50% to take account of mezzanine trading levels. This equates to a net additional turnover of £0.8m for Unit 2 Ashford Business Park and Unit 8 Warren Retail Park.

7.47 As part of the NPPF's Duty to Cooperate, consultation was undertaken with neighbouring local authorities to identify key retail and leisure commitments and proposals and key site allocations coming forward that could influence shopping and leisure patterns in Ashford. Contact was made with the local planning authorities in Canterbury City, Dover District, Maidstone Borough, Shepway District, Tunbridge Wells Borough Councils. The discussions confirmed that there are no key planned or proposed developments coming forward over the plan period that would impact on retail market shares for stores in Ashford.

7.48 Sites and schemes earmarked for development in neighbouring authorities over the forecast period include the following:

- **Shepway District Council** is promoting the redevelopment of Folkestone Harbour and Seafront within existing and emerging planning policy. A masterplan for the residential-led scheme includes 10,000 $m^2$ for retail, office and community space. The Council has confirmed that the scheme will be delivered over a 20 year period.
- Various site allocations proposed in **Royal Tunbridge Wells Borough** Site Allocations Development Plan Document that support new retail floorspace. The most notable retail allocation is Policy AT/RTW19, which promotes an extension of the Royal Victoria Place shopping centre in Tunbridge Wells for comparison retail floorspace (13,000 $m^2$). Other sites supported for new comparison retail development include the former Civic Site (Policy AT/RTW2A) and Cinema Site (Policy AT/RTW2B). Tunbridge Town Centre attracts a limited market share of retail expenditure from Ashford Borough. While the extension of Royal Victoria Place will

strengthen the centre's retail offer, it is unlikely to impact on expenditure retention for Ashford Borough.

- No major proposals for retail and leisure have been identified in **Canterbury City Council area**. However, we note various site allocations for mixed use development that include retail are identified in Policy TCL10 of the draft Local Plan 2014. Sites in Canterbury City Centre include White Horse Lane, Roger Britton Carpets, Kingsmead and the Peugeot Garage. Furthermore, Policy TCL7 promotes the development of the Wincheap Retail Area to serve as a satellite retail area of Canterbury City. The area currently includes Wincheap Retail Park. It is advised that the Council monitor schemes coming forward for the area, which has the potential to attract increased expenditure from Ashford Borough.
- **Dover District Council** is promoting the redevelopment of the St James site in Dover Town Centre for new retail and leisure provision. The site is allocated within the Council's Core Strategy. The town centre attracts a limited market share of retail expenditure from Ashford Borough. Therefore, we do not consider that proposals coming forward for Dover will impact on shopping patterns in Ashford Borough.

## 'BASELINE' CAPACITY: BOROUGH AREA-WIDE FORECASTS

7.49 The 'baseline' Council area-wide ('global') capacity forecasts for both convenience and comparison goods is based on the 2012-based Sub-National Population Projections sourced from ONS and derived from Experian. A more detailed breakdown is provided of the potential capacity for new floorspace in Ashford and Tenterden Town Centres.

7.50 Overall, the capacity forecasts will enable Ashford Borough's local planning authority to test the strategic options for the spatial distribution of new retail-led development over the plan period, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF (paragraph 23). The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

7.51 It has necessarily been assumed for the purpose of the capacity assessment that the Borough's (convenience and comparison goods) retail market share is in '*equilibrium*' at the base year. In other words we assume that the existing centres and stores in the Borough are broadly trading in line with appropriate 'benchmark' turnover levels at the base year. This is supported by the findings of the centre audits which did not show any strong indication that stores in Tenterden and Ashford Town Centres were overtrading (e.g. pedestrian and car park congestion, long check out queues, etc.). It is also supported from the findings of the market share analysis which shows that market shares for stores in Ashford Town Centre and the Designer Outlet Centre have remained

largely unchanged since the 2003 Retail Study. On this basis any residual expenditure available to support new retail floorspace within the Study Area over the development plan period is derived from the difference between the forecast growth in '**current'** (survey-derived) turnover levels; and the growth in **'benchmark'** turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace[28].

### Convenience Goods 'Baseline' Capacity

7.52 Table 11 (**Appendix 7A**) sets out and explains the key steps underpinning the convenience goods capacity assessment. The 'baseline' expenditure and floorspace capacity forecasts are summarised in the table below:

Table 7.1 **Borough-wide Capacity Forecasts – Assuming 'Equilibrium' at 2015**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Residual Expenditure (£m): | 0 | -£28.0 | -£6.6 | £13.7 |
| **Floorspace Capacity ($m^2$ net):** | | | | |
| Superstore Format: | - | -2,315 | -544 | 1,127 |
| Supermarket/Discounter Format: | - | -5,156 | -1,213 | 2,511 |

Source: Table 11, Appendix 7A

7.53 In order to convert the residual expenditure into a net sales figure we have assumed that new floorspace occupied by the '*top 6*' grocers (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) will achieve an average sales density of circa £12,250 per $m^2$ in 2015 (2012 prices). On this basis the forecasts show that there is no forecast capacity for new convenience retail floorspace over the next ten years (i.e. up to 2020), after taking into account all known commitments. This is attributed to convenience floorspace commitments associated with the planned communities at Cheeseman's Green and Chilmington Green. Capacity is forecast to emerge at the end of the plan period (2030) for 1,127 $m^2$.

7.54 Alternatively, based on a lower average sales level of £5,500 per $m^2$ in 2015 the forecast expenditure capacity could accommodate a new supermarket (e.g. Co-Op, Budgens, etc.) and/or discount floorspace (e.g. Aldi, Lidl, Netto, etc.) trading at lower average sales levels. However, even on this basis, forecast capacity remains limited to 2030 where there is potential to support 2,511 $m^2$ net for supermarket/ deep discounter floorspace.

7.55 In summary, the capacity forecasts could support one smaller format superstore or circa three supermarkets and/or discount retailers (e.g. Aldi, Netto, Co-op, etc.) by

[28] The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note. However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

2030 in a sustainable and sequentially preferable location in the Borough over the development plan period. Any new foodstore should preferably be located within Ashford Town Centre where there is an identified qualitative need for improved convenience provision to help the town centre compete more effectively against the out-of-centre foodstores in the Borough. This would also be accordance with national and local plan policy, which supports a town centre first approach to new retail development. Alternatively the forecast capacity could help to support smaller convenience outlets, or the extensions of existing stores in the most sustainable and accessible locations.

7.56 Notwithstanding the qualitative need for a new foodstore in Ashford Town Centre, meeting this need will depend on the level of market interest and demand.

### Comparison Goods 'Baseline' Capacity

7.57 Table 11 (**Appendix 8A**) sets out the detailed steps in the comparison goods capacity assessment. The residual expenditure and floorspace capacity forecasts are summarised in the table below. As for convenience goods this approach assumes '*equilibrium*' at the base year and constant market shares over the forecast period.

Table 7.2 **Borough-Wide Capacity Forecasts – Assuming 'Equilibrium' from 2015**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Residual Expenditure (£m): | £0 | -£4.1 | £58.5 | £142.1 |
| **Floorspace Capacity ($m^2$ net):** | **-** | **-676** | **8,631** | **18,807** |

Source: Table 11, Appendix 8A (Steps 5 & 6)

7.58 As the table shows, there is limited forecast capacity for 676 $m^2$ net new comparison goods floorspace in 2020, after taking into account all the known planned commitments identified in Table 10 (**Appendix 8A**). The capacity is forecast to increase to 8,631 $m^2$ net by 2025 and to 18,807 $m^2$ net by 2030.

7.59 It should be noted that the forecast expenditure 'surplus' has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £5,500 per $m^2$ at 2015. This is broadly equivalent to the average sales density of new comparison goods floorspace trading in prime shopping locations. However, average sales levels will inevitably vary between different locations and different types of operators[29], and this will impact on the capacity and impact of new retail floorspace. Local planning authorities will therefore need to take this into account

[29] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per $m^2$, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per $m^2$ and above.

when assessing and determining applications for different operators and different types of retail floorspace (such as retail warehouses for example).

## 'BASELINE' CAPACITY: CENTRE FORECASTS

7.60 To further help inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) development in the Borough, we have also carried out a more refined (centre-by-centre) capacity assessment for Ashford and Tenterden Town Centres.

7.61 It should be noted at the outset that any forecast floorspace capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives.

7.62 If sufficient town centre and/or edge of centre sites are not available to meet the forecast capacity over the development plan period, then local planning authorities are required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible and sustainable locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, such as through linked pedestrian trips and increased footfall. Against this background, the following sets out our approach and retail capacity forecasts for Ashford and Tenterden Town Centres.

### Ashford Town Centre

7.63 The convenience goods capacity forecasts for Ashford Town Centre are set out in Table 12 (Appendix 7A) and in Table 12 (Appendix 8A) for comparison goods. The forecasts are summarised below:

Table 7.3 **Ashford Town Centre - Capacity Forecasts**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **CONVENIENCE GOODS:** | | | | |
| Residual Expenditure (£m): | - | £1.3 | £2.4 | £3.5 |
| Floorspace Capacity ($m^2$ net): | - | 106 | 200 | 289 |
| **COMPARISON GOODS:** | | | | |
| Residual Expenditure (£m): | - | £14.2 | £47.8 | £92.3 |
| Floorspace Capacity ($m^2$ net): | - | 2,329 | 7,060 | 12,213 |

Source: Table 12 (**Appendix 7A and 8A)** (Steps 5 & 6)

7.64 As the table shows, there is limited forecast capacity for new convenience goods floorspace in Ashford Town Centre which reflects the low level of expenditure retention in the town centre due to the dominance of out of centre foodstores and subdued growth to support new floorspace. In terms of comparison goods, the forecasts show capacity for 2,329 $m^2$ in 2025, increasing to 7,060 $m^2$ net by 2025 and 12,213 $m^2$ net by 2030.

### Tenterden Town Centre

7.65 The forecast capacity for new convenience (see Table 13; Appendix 7A) and comparison goods (see Table 13; Appendix 8A) retail floorspace in Tenterden is as follows:

Table 7.4 **Tenterden Town Centre - Capacity Forecasts**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **CONVENIENCE GOODS:** | | | | |
| Residual Expenditure (£m): | - | -£5.5 | -£2.4 | £0.6 |
| Floorspace Capacity ($m^2$ net): | - | -455 | -196 | 50 |
| **COMPARISON GOODS:** | | | | |
| Residual Expenditure (£m): | - | £0.1 | £3.7 | £8.5 |
| Floorspace Capacity ($m^2$ net): | - | 9 | 541 | 1,122 |

Source: Table 13 (**Appendix 7A and 8A)** (Steps 5 & 6)

7.66 There is no forecast capacity for convenience floorspace in Tenterden over the short TO medium term (up to 2025), with capacity only emerging in 2030 for 50 $m^2$. The absence of convenience capacity is influenced by planned convenience floorspace commitments which will absorb the forecast residual expenditure, including the planned extension to the edge of centre Tesco store in Tenterden, which will account for £9.0m of convenience expenditure.

7.67 For comparison goods, there is forecast capacity for 541 $m^2$ net in 2025, increasing to 1,122 $m^2$ by 2030. This could support the provision of additional comparison retail units in the town centre.

### Local Centres/Villages

7.68 In addition to the Borough's two main town centres we have also assessed whether there is any capacity for new retail floorspace in the smaller village centres, after taking account of existing known commitments (Table 14, **Appendix 7A and 8A**). Any capacity identified for new retail provision is likely to serve convenience retail with a top-up shopping function and will be driven by market demand. The results are summarised in the table below.

Table 7.5 **Local/ Village Centres (Combined) - Capacity Forecasts**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **CONVENIENCE GOODS:** | | | | |
| Residual Expenditure (£m): | - | £1.4 | £2.7 | -£4.0 |
| Floorspace Capacity ($m^2$ net): | - | 119 | 225 | 324 |
| **COMPARISON GOODS:** | | | | |
| Residual Expenditure (£m): | - | £0.6 | £1.8 | £3.3 |
| Floorspace Capacity ($m^2$ net): | - | 93 | 259 | 440 |

Source: Table 14 (**Appendix 7A and 8A)** (Steps 5 & 6)

7.69 As the table shows, there is limited cumulative forecast capacity to support new retail floorspace in the Borough's network of smaller local/ village centres, which is to be expected given their role and function serving the more day-to-day shopping and service needs of their local catchment populations. For convenience goods in particular, there is potential accommodate a local convenience format grocery operator (e.g. Tesco Express, Sainsbury's Local, etc.) or an extension to an existing grocery store. Alternatively, based on a lower sales density for local convenience operators (e.g. Nisa, Londis, One-Stop, etc.) capacity for new convenience floorspace increases to 723 $m^2$ (Table 14, Appendix 7A).

### Rest of Borough

7.70 The capacity assessment identifies limited residual forecast capacity for the Borough after taking account of retail associated with the planned communities at Cheeseman's Green and Chilmington Green. We understand that the retail uses and floorspace promoted in the outline applications for both communities is indicative and is dependent on the completion of housing phases. However, given that these new communities will be supporting future populations we must assume that the outline retail uses will be delivered to promote sustainable development. The turnover of these schemes will absorb residual capacity in the short to medium. In the longer term (by 2030) there is forecast capacity to support 464 $m^2$ (net) of convenience (superstore) floorspace and 5,032 $m^2$ (net) for comparison floorspace. Given that national policy promotes the town centre 'first' approach to new town centre uses, this identified floorspace capacity should be used to support new retail development in line with the NPPF's sequential test. In this case, this any surplus retail capacity in Borough should be directed to Ashford and Tenterden Town Centres followed by the Borough's local centres (subject to market demand).

Table 7.6 **Summary of Forecast Convenience Goods Capacity ($m^2$ net)**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Ashford Town Centre ($m^2$ net) : | - | 106 | 200 | 289 |
| Tenterden Town Centre ($m^2$ net) : | - | -455 | -196 | 50 |
| Local/ Village Centres ($m^2$ net) : | - | 119 | 225 | 324 |
| Rest of Borough ($m^2$ net) : | - | -2,085 | -774 | 464 |
| **TOTAL BOROUGH ($m^2$ net) :** | - | **-2,315** | **-544** | **1,127** |

Source: Tables 12-15, Appendix 8A.

Table 7.7 **Summary of Forecast Comparison Goods Capacity ($m^2$ net)**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Ashford Town Centre ($m^2$ net) : | - | 2,329 | 7,060 | 12,213 |
| Tenterden Town Centre ($m^2$ net) : | - | 9 | 541 | 1,122 |
| Local/ Village Centres ($m^2$ net) : | - | 93 | 259 | 440 |
| Rest of Borough ($m^2$ net) : | - | -3,107 | 771 | 5,032 |
| **TOTAL BOROUGH ($m^2$ net) :** | - | **-676** | **8,631** | **18,807** |

Source: Tables 12-15, Appendix 8A.

### Proposed Designer Outlet Centre Extension

7.71 In considering the implications of the proposed extension to Ashford Designer Outlet, we have analysed the potential turnover of the proposal based on the net sales area and sales density identified in the applicant's supporting Retail Impact Assessment[30]. We have also assumed that the proposed extension will draw 40% of its trade from the Study Area, with the remainder (60%) from outside of the Study Area as shown in Table 10a (**Appendix 8A**). This reflects our assumptions on the Designer Outlet's existing expenditure inflow, which is based on the findings of the visitor survey contained in the RIA.

7.72 Based on the above, the proposed extension would generate a turnover of £18.3m from the Ashford Borough Study Area in 2020 (Table 10a, Appendix 8). This would absorb the majority of forecast comparison floorspace capacity in the Borough in the medium term (i.e. up to 2025). Even after taking account of the proposed extension to the Designer Outlet; by 2030 there is residual capacity to support both comparison floorspace. However, there is concern that the delivery of the proposed extension could impact on market demand from high street retailers to locate within Ashford Town

[30] Retail Impact Assessment prepared by Dr Richard Doidge on behalf of McArthur Glen.

Centre. While it is acknowledged that outlet centres attract a different format of retailing, it could influence whether a prospective retail operator trades as a full-priced format within the town centre or a discount format at the outlet centre. Therefore, the Council should fully assess the type of retailer intended to occupy the proposed extension and how the applicant has assessed the potential impact on Ashford Town Centre and planned investment for the centre.

## CAPACITY ASSESSMENT SCENARIO 1: OCCUPATION OF KEY VACANT RETAIL FLOORSPACE

7.73 The health check assessment for Ashford Town Centre identified a high proportion of vacant retail units, including within prime shopping areas such as County Square Shopping Centre. Therefore, consideration has been given to the potential for existing vacant floorspace in prime shopping areas to accommodate identified comparison goods floorspace capacity for the Borough.

7.74 Representatives for County Square shopping centre recorded 19 vacant units in the centre in March 2015, which equates to 3,790 $m^2$ of gross vacant floorspace. This in turn equals a net sales area of 2,653 $m^2$ (i.e. 70% of gross). Given the shopping centre represents Ashford Town Centre's prime shopping area, there is greater potential for vacant floorspace in the centre to be reoccupied in the future. Similarly, we also consider that Unit 2-8 High Street, which is the largest vacant unit on the High Street (estimated net sales area of 390 $m^2$ net) has the potential to be reoccupied.

7.75 Based on the above, 3,043 $m^2$ (net) of vacant floorspace could potentially be potentially reoccupied thereby reducing the Borough-wide comparison goods floorspace forecast to 5,588 $m^2$ (net) in 2025 and 15,764 $m^2$ (net) in 2030. This also correlates to a reduction in forecast floorspace for Ashford Town Centre to 4,017 $m^2$ for 2025 and 9,170 $m^2$.

## CAPACITY ASSESSMENT SCENARIO 2: POPULATION UPLIFT

7.76 In assessing capacity we have also tested how an increase in the Borough's population could alter retail floorspace capacity. To achieve this we have increased the population projections for Zones 1 to 4 (broadly reflecting the Borough area) by 10%. Table 1b (Appendix 7B and 8B) sets out the revised population figures for Zones 1 to 4.

7.77 The same methodology used to quantify the baseline capacity assessment has been applied to assess capacity based on the alternative population scenario (i.e. **CREAT$^e$** model). This includes the same baseline and forecast growth rates identified for expenditure per capita along with the same 'productivity' growth estimates for existing and committed retail floorspace turnover.

7.78 Borough-wide capacity forecasts for convenience and comparison floorspace are set out in Table 11 (Appendix 7B and 8B). Forecast floorspace for the two town centres, the

local centres (combined) and the rest of the Borough is identified in Tables 12 to 15 (Appendix 7B and 8B).

7.79 The findings of the alternative population scenario capacity assessment for convenience floorspace is summarised in the below table.

Table 7.8 **Summary of Forecast Convenience Goods Capacity ($m^2$ net) based on a 10% population uplift for Ashford Borough**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Ashford Town Centre ($m^2$ net) : | - | 116 | 220 | 318 |
| Tenterden Town Centre ($m^2$ net) : | - | -426 | -141 | 130 |
| Local/ Village Centres ($m^2$ net) : | - | 130 | 247 | 357 |
| Rest of Borough ($m^2$ net) : | - | -1,939 | -496 | 865 |
| **TOTAL BOROUGH ($m^2$ net) :** | - | **-2,118** | **-170** | **1,669** |

Source: Tables 11-15, Appendix 7B

7.80 As the table above shows, an increase in the Borough's population (based on Zones 1 to 4) results in a forecast capacity for superstore floorspace of 1,669 $m^2$ (net). The uplift in the Borough's population equates to a net increase in capacity of 542 $m^2$ (net) in 2030. For comparison good capacity, the table below show that the alternative population scenario would result in a forecast capacity floorspace of 21,275 $m^2$ by 2030 (or 18,232 $m^2$ when taking of the potential reoccupation of vacant floorspace identified in Scenario 1). This equates to a net increase in floorspace capacity of +2,468 $m^2$ (net) by 2030.

Table 7.9 **Summary of Forecast Comparison Goods Capacity ($m^2$ net) based on a 10% population uplift for Ashford Borough**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Ashford Town Centre ($m^2$ net) : | - | 2,598 | 7,802 | 13,470 |
| Tenterden Town Centre ($m^2$ net) : | - | 39 | 625 | 1,264 |
| Local/ Village Centres ($m^2$ net) : | - | 103 | 285 | 484 |
| Rest of Borough ($m^2$ net) : | - | -2,896 | 1,370 | 6,057 |
| **TOTAL BOROUGH ($m^2$ net) :** | - | **-156** | **10,082** | **21,275** |

Source: Tables 11-15, Appendix 8B

## CAPACITY ASSESSMENT SCENARIO 3: MARKET SHARE 'SENSITIVITY' TEST

7.81 To further help inform the Council's assessment of the potential need for new retail floorspace in the Borough and its two main centres we have 'tested' the robustness of the ('*baseline*') assumption that the retail market is in '*equilibrium*' at the base year.

7.82 The market share analysis shows that stores in the Borough are retaining 89.1% of convenience expenditure from the Borough area (which broadly correlates to Zones 1 to 4). In other words, only 10.9% of expenditure is lost to foodstores and convenience outlets outside of the Borough. As such, we consider the Borough's expenditure retention to be very strong, with leakage levels comparable to other local authorities areas that are well served by foodstore and convenience retail provision.

7.83 However, within the Borough there is clearly an imbalance of convenience retail expenditure to out of centre foodstores; particularly in the Ashford urban area (Zones 1a and 1b). This is influenced by a lack of foodstore provision in Ashford Town Centre. Therefore, we have tested the potential to improve convenience market share for Ashford Town Centre through the potential 'claw back' of expenditure from out of centre foodstores (e.g. Asda and Sainsbury's).

7.84 As Table 16 (Appendix 7A) shows, by increasing the market share of Ashford Town Centre by up to 15 percentage points (i.e. from 5.1% to 20.1%) in 2015 while reducing the market share of edge and out of centre foodstores (i.e. from 65.6% to 50.6%) this could result in forecast capacity to support 751 $m^2$ net sales of new foodstore floorspace in 2025 increasing to 1,084 $m^2$ (net sales) by 2030. Alternatively, there could be potential to support a deep discount foodstore of up to 1,673 $m^2$ in 2025 or 2,413 $m^2$.

7.85 For comparison goods, we have taken a similar approach by focusing on the potential to improve the market share of Ashford Town Centre based on an increased retention of expenditure within the Borough area (Zones 1 to 4). The 'claw back' of shoppers and expenditure from competing centres (e.g. Canterbury and Folkestone) and out of centre shopping facilities in the Borough (e.g. John Lewis at Home, Gallagher Retail Park, etc.) could contribute to increased market shares for Ashford Town Centre. However the uplift in the town's market share will inevitably depend on other key commercial factors such as, for example, the quality of the tenants and brands taking space in any new floorspace, and the scale, format and design of the new retail units.

7.86 It should be noted that we have not assumed an uplift in the town centre's market share from peripheral zones (e.g. Zones 5 to 8) due to the proximity and strength of retail offer of larger centres located within or near these zones. For example, Folkestone Town Centre is located in Zone 7 while Faversham and Canterbury are located close to Zone 8.

7.87 Therefore, focusing on the Borough area only (Zones 1 to 4), we have tested a reasonable uplift in Ashford Town Centre's comparison goods market share of up to ten percentage points from 44.9% to 54.9%. This assumes a ten percentage point reduction in expenditure leaked to out of centre stores in the Borough and competing centres outside the Borough (e.g. Canterbury). As Table 15 (Appendix 8) shows, an improvement expenditure retention for Ashford Town Centre could increase floorspace capacity to 2,545 $m^2$ (net sales) in 2020; increasing to 8,155 $m^2$ (net sales) in 2025 and 14,264 $m^2$ (net sales) by 2030. When taking account of the potential to reoccupy vacant floorspace in Ashford Town Centre (Scenario 1) this would reduce capacity to 5,112 $m^2$ in 2025 and to 11,221 $m^2$ in 2030.

7.88 The revised forecast capacity for new convenience (see Table 15; Appendix 7A) and comparison goods (see Table 15; Appendix 8A) retail floorspace in Ashford Town Centre based on an uplift in market shares is set out below:

Table 7.10 **Ashford Town Centre - Capacity Based on Improved Market Shares for Zones 1 to 4**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **CONVENIENCE GOODS – 15% Uplift** | | | | |
| Residual Expenditure (£m): | - | £4.8 | £9.1 | £13.2 |
| Floorspace Capacity ($m^2$ net): | - | 397 | 751 | 1,084 |
| **COMPARISON GOODS – 10% Uplift** | | | | |
| Residual Expenditure (£m): | - | £15.5 | £55.3 | £107.8 |
| Floorspace Capacity ($m^2$ net): | - | 2,545 | 8,155 | 14,264 |

Source: Table 15 (**Appendix 7A and 8A)**

7.89 It should be stressed again that the potential to improve market shares for Ashford Town Centre is purely a hypothetical scenario. It will depend on the availability, suitability and viability of town centre and edge-of-centre sites to accommodate modern new retail floorspace and a mix of other uses and, critically, the market appetite from investors, developers and operators to develop new space in the town centre.

7.90 In this case, the health check assessment identifies a qualitative need to support new convenience and comparison retail floorspace. This is supported by the findings of the household survey and stakeholder consultation, which indicates demand for improved retail provision in the town centre. There is the potential that the development of Elwick Place as a key leisure facility could also support an increase in market shares through linked trips and increased expenditure in the town centre's existing shops, facilities and businesses. Similarly, increased linked trips between the Designer Outlet Centre and Ashford Town Centre could help to support improved market shares for the town centre.

## SUMMARY

7.91 This section has assessed the Borough-wide 'baseline' capacity for new (convenience and comparison goods) retail floorspace in the Study Area over the forecast period drawing on the ONS 2012-based Sub-National Population Projections.

7.92 As its starting point, the strategic capacity assessment assumes that the Borough's (convenience and comparison goods) retail market is in '*equilibrium*' at the base year and holds market shares constant over the forecast period in accordance with good practice. The capacity forecasts take into account all the known retail floorspace commitments in the Borough at the time of preparing this study.

7.93 For convenience goods there is no forecast capacity Borough-wide in the short to medium term (up to 2030). This is because the planned foodstores that form part of the planned communities at Chilmington Green and Cheeseman's Green will effectively 'soak' up any quantitative need for new retail floorspace over the short/medium term. It is only by 2030 when forecast capacity emerges for 2,511 $m^2$ net of new convenience goods floorspace, which should be directed towards strengthening convenience retail provision in Ashford Town Centre.

7.94 For comparison goods there no capacity for new retail floorspace in the short term (up to 2020), although there is forecast capacity for 8,631 $m^2$ net by 2025; increasing to 18,807 $m^2$ by 2030. Ashford Town Centre accounts for 7,060 $m^2$ net of Borough-wide capacity in 2025; increasing to 12,213 $m^2$ by 2030. There is more limited capacity forecast for Tenterden Town Centre (1,122 $m^2$ net). A small quantum of capacity is identified for the Borough's smaller centres, which could support local retail services. There is limited residual comparison floorspace capacity for the rest of the Borough due to planned retail associated with the two planned communities, which absorb residual expenditure over the short and medium term (up to 2025). By 2025, up to 5,032 $m^2$ of residual comparison goods capacity is identified. However, in supporting national policies town centre first approach, this surplus floorspace should be directed to Ashford and Tenterden Town Centres.

7.95 In considering the potential to reoccupy key vacant floorspace (Scenario 1) identified in Ashford Town Centre, this would reduce Borough-wide comparison goods capacity to 5,588 $m^2$ in 2025 and 15,764 $m^2$ in 2030. It would in turn reduce forecast floorspace capacity for Ashford Town Centre to 4,017 $m^2$ in 2025 and 9,170 $m^2$ in 2030.

7.96 In testing an uplift in the Borough's population (the Borough area broadly correlates to Zones 1 to 4) by 10% this equates to a net increase in forecast capacity of 542 $m^2$ for convenience floorspace and 2,468 $m^2$ for comparison floorspace.

7.97 We have also tested the hypothetical impact on the capacity forecasts of increasing Ashford Town Centre's market shares (Scenario 3) for convenience (by 15%) and comparison (by 10%) within the Borough area (Zones 1 to 4). However, it should be noted that the potential to improve market shares will depend on market demand for

new retail provision in the town centre both from shoppers and investors, as well as the availability of suitable and viable sites for new development

7.98 Against this background meeting the need for the forecast new retail floorspace in full over the next 3-5 years and over the lifetime of the development plan will clearly depend on the Council identifying suitable and viable sites and redevelopment opportunities in the Borough's main centres that are either available now, or will be available at some point in the next 5, 10 and 15 year periods. If appropriate sites and redevelopment opportunities are not likely to come forward over the development plan period, then consideration should be given by the Council to sites on the edge of these centres that are well connected to the primary shopping areas and are capable of reinforcing the pedestrian retail circuit and generating linked trip expenditure to the benefit of each centre's overall vitality and viability.

7.99 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term. The Council should take into account these margins for error when assessing the need for new retail floorspace, particularly post 2025.

# 8.0 LEISURE 'GAP' ASSESSMENT

8.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, local planning authorities should promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres. Against this background leisure uses can make a significant contribution to a town centre's vitality and viability. A good provision and choice of leisure facilities and uses can help to increase '*dwell times'*, footfall and turnover in centres, with significant benefits for both daytime and evening economies.

8.2 However, the commercial leisure sector is highly complex and dynamic, as commercial leisure uses are particularly sensitive to changes in economic, population, lifestyle and fashion trends. As a result, forecasting the growth of this sector and identifying the need for new facilities is more complicated than for retailing. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are less sophisticated than for retailing.

8.3 The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis therefore focuses on the following key elements:

- a review of the key trends driving market demand in the leisure sector over the last 10-15 years;
- an audit of current commercial leisure uses in the Borough (both town and out-of-centre) to help identify any potential 'gaps' in provision;
- a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the Borough; and
- a broad economic assessment of the need for new additional leisure facilities across Ashford based on different approaches.

8.4 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that can make a significant contribution to the overall vitality and viability of town centres (i.e. cafés, bars, restaurants, cinemas, healthclubs, bowling alleys, hotels etc.).

## LEISURE EXPENDITURE GROWTH

8.5 Like the retail market, the commercial 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 leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

8.6 The table below shows the UK average expenditure per head on commercial leisure services[31] and the average for the defined Study Area based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across all the zones.

Table 8.11 **Estimates of Spending on Leisure Services in 2013 (£ per head)**

| | Accommodation | Cultural services | Games of chance | Hairdressing salons & personal grooming | Recreational and sporting services | Restaurants, cafes, etc. |
|---|---|---|---|---|---|---|
| **Zone 1a** | £121 | £301 | £159 | £84 | £118 | £936 |
| **Zone 1b** | £111 | £281 | £154 | £74 | £106 | £851 |
| **Zone 2** | £204 | £408 | £179 | £129 | £200 | £1,326 |
| **Zone 3** | £201 | £381 | £167 | £119 | £190 | £1,245 |
| **Zone 4** | £196 | £391 | £184 | £121 | £192 | £1,239 |
| **Zone 5** | £186 | £345 | £197 | £110 | £169 | £1,129 |
| **Zone 6** | £147 | £321 | £188 | £103 | £131 | £1,041 |
| **Zone 7** | £143 | £319 | £181 | £95 | £139 | £1,028 |
| **Zone 8** | £183 | £359 | £168 | £112 | £170 | £1,203 |
| **Study Area Average** | £166 | £345 | £175 | £105 | £157 | £1,111 |
| **UK Average** | **£138** | **£300** | **£174** | **£86** | **£98** | **£1,097** |

Source: Experian, 2013 prices.

8.7 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in *Retail Planner Briefing Note 12.1* (October 2014). EBS forecasts show negative to zero annual growth between 2012 to 2013, with stronger growth forecast in the short term (2014-2015) before stabilising over the longer term (from 2017) to between +1.1% and 1.3% per annum. This forecast growth is higher than annual average historic growth rates for the period 1983-2013, which showed no growth.

Table 8.12 **Actual & Forecast Growth in UK Leisure Spend (% per annum)**

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017-2021 | 2022-2030 |
|---|---|---|---|---|---|---|---|
| Leisure Spend Growth (%) | -0.6 | 0.0 | 2.1 | 2.8 | 1.3 | 1.1 | 1.3 |

Source: Experian Business Strategies, Retail Planner Briefing Note 12.1 (October 2014).

[31] Excludes expenditure on education, insurance, social protection, and 'other leisure' as identified by Experian.

8.8 The base year expenditure per capita levels on leisure (Table 8.1) have been projected forward to 2030 using Experian's forecast annual growth rates (Table 8.2) and then applied to the projected population for Ashford Zones (1a and 1b), and the wider Study Area to identify the total available expenditure on leisure and recreation goods and services. As for the retail assessment, we have assessed total available leisure expenditure based on the ONS's 2012-based Sub-National Population Projections.

8.9 The table below shows that available commercial leisure expenditure for the Study Area is forecast to increase by 35.0% between 2015 and 2030. Within the Borough area (Zones 1 to 4), growth in available commercial expenditure is slightly higher over the same period at 37.7%.

8.10 Looking at key zones within the Borough area, Zones 1a and 1b (which broadly corresponds to the Ashford urban area) is forecast to increase by 24.3% (+£31.6m) by 2025 from £129.8m in 2015 to £161.4m. By 2030, forecast available commercial expenditure in these zones is forecast to increase to £179.1m (+38%/ +£49.3m). Zone 4 (which broadly corresponds to the Tenterden and its surrounding rural catchment) is forecast to increase from £55m to £68.4m by 2025 (+23.9%/ +£13.2m). By 2030, total available commercial leisure expenditure in Zone 4 will increase to £75.8m (+37.3%/ +£20.6m).

Table 8.13 **Total Available Commercial Leisure Expenditure: 2015 – 2030 (£m)**

| | 2015 | 2020 | 2025 | 2030 | Change: 2015-2030 (£ million) | Change: 2015-2030 (%) |
|---|---|---|---|---|---|---|
| **Zone 1a** | £63.4 | £70.7 | £78.9 | £87.6 | £24.20 | 38.2% |
| **Zone 1b** | £66.4 | £74.0 | £82.5 | £91.5 | £25.10 | 37.8% |
| **Zone 2** | £46.9 | £52.2 | £58.1 | £64.5 | £17.60 | 37.5% |
| **Zone 3** | £34.9 | £38.9 | £43.3 | £48.1 | £13.20 | 37.8% |
| **Zone 4** | £55.2 | £61.4 | £68.4 | £75.8 | £20.60 | 37.3% |
| **Zone 5** | £38.1 | £41.8 | £46.4 | £51.3 | £13.20 | 34.6% |
| **Zone 6** | £45.5 | £49.5 | £54.5 | £59.8 | £14.30 | 31.4% |
| **Zone 7** | £168.1 | £183.2 | £201.3 | £221.1 | £53.00 | 31.5% |
| **Zone 8** | £33.8 | £37.3 | £41.4 | £45.8 | £12.00 | 35.5% |
| Study Area | £552 | £609 | £675 | £745 | £193.00 | 35.0% |

Source: Table 4 (Appendix 9). All monetary figures are expressed in 2013 prices.

8.11 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to improve the scale and quality of Class A3 uses in the Borough's two town

centres over the development plan period, subject to market demand. The aim should be to strengthen the wider mix of leisure uses and attractions in Ashford Town Centre as a priority to ensure it can compete with other centres and to ensure its competitiveness with Ashford Designer Outlet. There is also potential to improve the offer in Tenterden subject to market interest and demand.

8.12 In the context of this forecast growth in leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the Borough's main centres and the likely need for new uses and facilities over the forecast period.

## CINEMA

***Market Overview***

8.13 The significant growth in modern multi-screen cinemas over the last twenty years has been fuelled by a number of factors; including the increase in Hollywood 'blockbusters' and new developments in cinema technology (such as digital 'surround-sound' and, most recently, 3-D screen technology). Most multiplexes that opened during the 1990s were located on large out-of-centre and edge-of-town sites, often as part of shopping centres, retail parks or mixed leisure schemes featuring bowling, nightclubs and restaurants (such as, for example, Star City in Birmingham). Cinemas are important anchors for leisure and retail schemes, helping to generate footfall outside of shopping hours, linked trips and spin-off expenditure to other shops and facilities, including cafés and restaurants. Multiplexes have also been particularly successful in attracting shoppers and visitors into 'dead' areas of shopping centres, such as upper levels or the ends of malls.

8.14 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld, Odeon/UCI; Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC, Vue acquired the Apollo cinema chain and Cineworld acquired Picturehouse. From its beginnings in 1995 Cineworld now operates over 100 cinemas in the UK (including Picturehouse) and accounts for more than one quarter (25.9%) of the cinema box office market. Its most recent openings include an 11-screen cinema in Telford, a 6 screen site in St Neots and a 9 screen cinema in Wembley (all opened in 2013/14).

8.15 According to research by Dodona (a specialist market research consultancy in the cinema industry) there are 756 cinemas in the UK with a total of 3,867screens, of which approximately three-quarters are multiplexes. It should be noted that the number of cinemas has fluctuated, and has decreased between 2013 and 14 by 13, yet the number of screens has risen by 50 due to the increase in the number of multiplex

screens and the loss of 'traditional' cinemas. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than five screens) and screens in mixed-use venues (such as arts centres).

8.16 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health and the UK remains the third largest consumer market for filmed entertainment in the world. The latest research shows that box office revenue in 2013 in the UK exceeded £1bn for the third year in succession, based on 165.5m admissions. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

8.17 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the *'Screening Room'* concept, characterised by leather chairs and table service. The first 558m$^2$ *'Screening Room'* cinema opened in June 2011; in the Brewery, Cheltenham.

8.18 Research by Dodona indicates there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry" as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinema above the store.

***Existing Provision and Projected Demand***

8.19 The results of the household survey show that around two thirds (63%) of the Study Area's (Zones 1 to 8) population visit the cinema. This equates to 169,339 people, if taken as a percentage of the Study Area's total population in 2014.

8.20 Of those that visit the cinema in the Study Area, the vast majority (89%) visit the Cineworld in Eureka Entertainment Centre, outside of Ashford Town Centre. The cinema includes 12 screens and related concessions include a Baskin Robbins Scoop Ice Cream shop. Planning permission was granted in October 2013 to extend the venue to include three new screens[32]. However, this permission has yet to be implemented, with the permission due to expire in October 2016.

[32] Planning application reference: 10/01456/AS

8.21 The survey also indicated that a small proportion of cinema goers from the zones that lie mainly outside of Ashford Borough (i.e. Zones 5 to 8), also visit the Kino Digital cinema in Hawkhurst and the Silver Screen Cinema in Folkestone. The analysis demonstrates the popularity of the Cineworld in Ashford and shows that the facility is a key draw for visitors outside of the Borough.

8.22 With regard to frequency of visits, across the whole Study Area respondents mainly visited the cinema once every two months (30%). Only 10% of respondents in the Study Area visit the cinema on a more frequent basis (e.g. once a week or fortnight).

8.23 The latest evidence from Dodona indicates that the average screen density for cinema provision in the South East is 6.4 screens per 100,000 people[33] (British Film Institute, Statistical Yearbook 2014).

8.24 Based on this average screen density the table below shows the requirement for additional cinema screens in the Study Area. The HTIS showed that the majority of respondents from all Zones go to the Ashford cinema, apart from Zone 5 (where 57% of respondents go to Tunbridge Wells or Hawkhurst). Ashford's cinema-going catchment population is therefore drawn from the whole Study Area, but excluding Zone 5.

Table 8.14 **Ashford Borough Potential Capacity for New Cinema Screens**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| Study Area population excluding Zone 5 | 251,797 | 262,417 | 273,063 | 282,775 |
| Cinema Screen Density | 6.4 | 6.4 | 6.4 | 6.4 |
| Cinema Screen Potential | 16.1 | 16.8 | 17.5 | 18.1 |
| Existing & Planned Screen Provision* | 12 | 12 | 12 | 12 |
| Minus existing | 1 | 2 | 3 | 3 |

Source: Screen density for the South East derived from Dodana Research
Notes: Forecast population for the Study Area is based on ONS 2012-based Sub-National Population Projections. Existing and planned screen provision includes the extant permission for three additional screens at Cineworld Eureka Park.

8.25 The results of our assessment indicate that there is potential quantitative capacity for new cinema screens in the Borough based on the market share of cinema-goers to the Ashford Cineworld. This indicates the potential demand for a new multi-screen cinema in Ashford in the future. It should be noted that the demand for new screens is based on market shares remaining constant and does not take account of the potential to attract more cinema users. Due to the lack of provision outside of the Study Area, retention rates are currently very high (89% overall), although this could change if new provision was developed outside of the borough in the existing catchment area.

[33] Table 10.4, Statistical Yearbook 2014, British Film Institute and Dodana Research.

8.26 The net amount of additional screens that could be supported amounts to one new multiplex cinema (around 3 screens) over the development plan period. This assumes that the planned extension at Cineworld, Eureka Park is implemented. If the scheme does not come forward then the capacity for new screens in the Borough increases. Plans to develop the Elwick Place site in Ashford currently include the provision of a five screen cinema, which could be supported based on the current market share analysis.

## EATING & DRINKING OUT

8.27 The food and beverage sector, including restaurants, bars and pubs (Class A3, A4 and A5), provide an increasingly important part of a town centre's wider offer and economy. They also complement other town centres uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip.

***Market Overview***

8.28 As described previously average household spending on leisure services in the UK is dominated by eating and drinking out. Even in the context of the current economic recession this sector has remained buoyant. In terms of the pub trade, some of the key trends in recent years include:

- A move to more flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in supermarkets), has resulted in a number of pub operators widening their food and non-alcoholic beverage and the growth of so-called "*gastro-pubs*" as eating-out destinations in competition with more established restaurants.
- Increased consolidation and closures in the pub industry. According to the Campaign for Retail Ale (CAMRA) there have been 5,800 pub closures since 2008[34]. Recent research by CAMRA also suggests that on average around 29 pubs closed every week in the UK between June and December 2014[35].
- The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury's Local).
- The Home Office has also introduced a much more aggressive policy towards the pub industry. Powers for local authorities to establish Alcohol Disorder Zones (ADZ) are included in the Violent Crime Reduction Act (2006), which also places a charge on pubs and bars in a designated area to pay for additional policing,

[34] Source: Article published by CAMRA on 20th March 2013, www.camra.org.uk

[35] Source: Published results from the CGA-CAMRA Pub Tracker published in January 2015

environmental and other services in the neighbourhood. This increase in costs is also placing further pressure on the profit margins of some pub operators.

8.29 The restaurant sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include:

- An increase in promotions and discounts by the multiples to attract customers during off-peak periods (e.g. Pizza Express).
- More discerning customers who are basing their decisions to eat out on value for money, but not at the expense of quality in terms of service, food and the overall experience. Two successes are Jamie's Italian, Bill's and Cote. There has also been a growth in *'all-you-can-eat'* style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).
- For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's Pizza.

8.30 The café sector has also experienced strong growth over the last five years, despite the impact of the economic downturn. The branded coffee chains dominate the market with some 5,531 outlets in 2013 equating to a market share of 54%. Of these, the three leading multiple chains are Costa Coffee (1,670 outlets), Starbucks Coffee Company (790) and Caffè Nero (560), with a combined turnover of £2.6 billion in 2013[36]. Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade).

8.31 The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, a recent study by management consultancy Allegra Strategies predicts that the total UK coffee shop market still has potential for strong growth, and there is forecast to be over 20,500 outlets by 2018, with a total turnover of £8.7 billion. There would therefore appear to be potential for further growth in the café market, driven mainly by branded coffee chain expansion and non-specialist operator growth.

***Existing Provision***

8.32 Based on the most recent audit and site visit to the Borough's two town centres (see **Sections 5** and **6**), the current provision of Class A3 (restaurants and cafés), A4 (Pubs, bars etc.) and A5 (hot food takeaways) uses is as follows:

[36] Source: Allegra Strategies

Table 8.15 **Current Provision of Leisure Uses (%)**

| Location | Class A3 | Class A4 | Class A5 | Total A3-A5 | |
|---|---|---|---|---|---|
| | % | | | No. of Units | % of Total |
| Ashford Town Centre | 9.7% | 2.2% | 3.5% | 35 | 15.5% |
| Tenterden District Centre | 10.5% | 2.6% | 0.0% | 10 | 13.2% |
| **UK Average** | **8.5%** | **1.5%** | **5.6%** | **-** | **15.6%** |

Source: Ashford BC Town Centre Surveys and CJ Site Visit Survey 2014.

8.33 The table above shows that the main provision of Class A3-A5 uses are heavily concentrated in Ashford Town Centre and current provision (15.5%) is broadly in line with the Experian Goad UK average (15.6%). This demonstrates the centre's important role as the Borough's primary shopping, leisure and service destination.

8.34 However, the centre has attracted few key branded operators over recent years (limited to Starbucks, Costa, Pizza Express and Subway) alongside longer term established brands (e.g. McDonalds, KFC and Wimpy). However and most mid-range national multiple food and drink brands remain absent from the centre. The level of choice for visitors to the centre is therefore limited. Ashford Designer Outlet has attracted branded food and drink operators such as Wagamama, Pizza Express, Baskin Robbins and Café Nero. With plans to significantly increase food and beverage provision at the Designer Outlet, there is therefore a need for the town centre to improve and expand its offer in the future, which will help retain and attract town centre users.

8.35 Tenterden has a smaller number of food and drink operators, in keeping with its rural location and smaller size. However, the range and quality of this provision is generally high and compares well to Ashford Town Centre, albeit with a better quality of A3 offer. The focus of Tenterden High Street is generally retail, with a good level of A3 and A4 provision (above the UK average) but a low level of A5 provision. Tenterden benefits from a number of mid-range national multiple brands including Café Nero, Prezzo, Café Rouge and Costa Coffee.

8.36 It is important that Ashford town centre retains and enhances its food and beverage offer, as it not only supports the daytime economy, but is the main driver of the centre's evening economy. As such, measures to attract new operators should be promoted where possible. This could include, for example, better quality restaurants targeted at families to help draw more people to the town centre and encourage them to stay longer. This is particularly important given the current proposals to expand the out of centre food and beverage offer at the Eureka Entertainment Centre and also at the Ashford Designer Outlet Centre.

8.37 In terms of late night entertainment, the recently renovated Cameo nightclub located on Station Road is the major night club and dance venue in the Borough. A smaller venue in Ashford, Liquid and Envy, recently closed. A number of pubs and bars in

Ashford Town Centre currently operate with late licences (including for example the John Wallis, the George Hotel and the County Hotel). No nightclub or dance venues were identified in Tenterden, which is served by two public houses (the Vine Inn and The White Lion) and the bar at the Woolpack Hotel.

8.38 The results of the household survey also help to identify where people living in the Study Area currently prefer to eat and drink. The key results for the Study Area and key zones are as follows:

- A high proportion (80.0%) of respondents visit restaurants and cafés. Of this total, 72% visit a café or restaurant at least once a month.
- Based on responses in Ashford (Zones 1A and 1B) only, the majority of respondents normally choose to eat out at restaurants in Ashford (73% and 81% respectively).
- Responses for Zone 4 which covers Tenterden and the surrounding area, shows that Tenterden and Ashford were the most frequented by those eating out (58% and 23% respectively).
- Across the whole Study Area, Ashford was the most popular location for visiting restaurants (36%). The main competitor is Folkestone (19%), followed by Canterbury (9%), Hythe (8%) and Tenterden (6%).
- Some 52% of respondents in the Study Area visit pubs, bars, nightclubs and/or music venues. In Ashford (Zones 1A and 1B) the majority (25%) choose venues within Ashford (54% and 66% respectively). Across the Study Area, the majority visit Ashford (20%) or Folkestone (25% - all of which is derived from those living in Zone 7 in which Folkestone is located). Other frequently visited locations were Hythe (8%), Canterbury (7%) and Tenterden (6%). In terms of frequency, 71% go at least once a month.

***Forecast Demand for Eating and Drinking***

8.39 In order to assess the potential capacity for new eating and drinking establishments we have adopted a standard and robust approach. The assessment focuses on demand for food and drink floorspace within the Borough's main centres including Ashford Town Centre and Tenterden Centre.

8.40 The approach is based on the assumption that between 15% and 30% of the forecast capacity for new comparison goods floorspace (as identified in **Section 7**) could support a mix of new leisure services including cafés, restaurants, takeaways, pubs and wine bars. This assumption is supported by research that specifically identified that the hospitality industry, in its widest sense, "…*forms an important and sizeable proportion*

*of premises averaging 24% of ground floor stock"*[37]. Furthermore Experian GOAD's centre reports show that on average cafe's, restaurants, bars, pubs and takeaways account for over 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover.

8.41 Based on 15% to 30% of the baseline comparison goods capacity forecasts set out in **Section 7** we therefore estimate that there is a potential quantitative need for 1,295 $m^2$ to 2,589 $m^2$ of Class A3-A5 gross floorspace in the Borough by 2025. Forecast provision increases to between 2,821 $m^2$ to 5,642 $m^2$ by 2030.

Table 8.16 **Eating & Drinking Out - Projected Gross Floorspace ($m^2$)**

| | 2020 | 2025 | 2030 |
|---|---|---|---|
| Projected Comparison Floorspace | - | 8,631 | 18,807 |
| 15% of Comparison Floorspace to A3/A4/A5 Uses | - | 1,295 | 2,821 |
| 30% of Comparison Floorspace to A3/A4/A5 Uses | - | 2,589 | 5,642 |

Source: Table 12 Appendix 9

8.42 In summary, the forecast need for new food and beverage uses should be directed to Ashford Town Centre first to help increase competition and choice, and to help stimulate the centre's daytime/evening economies in accordance with national and local policies. In this context the emerging proposals for Elwick Place include the provision of Class A3 uses (circa 2,973 $m^2$ gross) and floorspace alongside a multiplex cinema. Taken together these commercial leisure uses will significantly strengthen the overall attraction, vitality and viability of Ashford Town Centre.

8.43 Meeting any forecast need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there. While new investment in Ashford Town Centre should be a priority, the quality of the eating and drinking offer should also be improved in Tenterden Town Centre at an appropriate scale to meet local demand, but subject to market demand.

## HEALTH & FITNESS NEED

### *Market Overview*

8.44 The health and fitness market has generally performed well during the economic downturn. The latest statistics from The Leisure Database Company[38] (market research

[37] The Streetscape of major UK cities', Savills (Winter 2004, pg.3).

38 The 2014 State of the UK Fitness Industry Report, The Leisure Database Company

specialist for the leisure industry) show that over the twelve month period to June 2014, the industry has grown its total market value by 3.9% to £4.08 billion, its member base by 4.5% and the total number of facilities by 1.6%. According to the Leisure Database Company (LDC), there were an estimated 6,112 private health clubs and public fitness centres facilities in the UK in 2013, which represented a small net increase from the 6,019 facilities the previous year[38]. The main operators in the market currently include:

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
- Virgin Active & Nuffield Health (previously Cannons) – dominate the mid-range family-oriented health and fitness market; and
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-town clubs at the more value end of the market.

8.45 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("*no frills*") fitness clubs includes EasyGym, Pure Gym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. Their business models are based on significantly discounted monthly subscriptions (of between £10 and £20 on average) and 24-hour opening. Although these clubs provide a basic offer (for example, they do not generally include fitness classes, personal trainers, swimming pools, saunas or steam rooms) they appear well suited to the current economic climate and are proving popular. According to LDC, the budget gym sector now accounts for 6% of total private clubs and 14% of private sector membership.

8.46 Overall, the proportion of the population in 2014 with a gym membership was estimated at 13.2%. According to LDC, the average number of members per club in the UK is estimated to be 1,426, which takes into account the average for independent venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members[39].

8.47 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

***Existing Provision***

[39] Sourced from the 2014 State of the UK Fitness Industry, the Leisure Database Company.

8.48 The table below summarises the current representation of national, regional and independent privately-owned health and fitness operators in the Borough, as well as the Council-owned leisure centre.

Table 8.17 **Existing Leisure Centres, Fitness Clubs & Gyms in the Borough**

| Facility | Location | Private Sector | Public Sector (or Trust) |
|---|---|---|---|
| Bannatyne Health Club | Ashford | ✓ | |
| Park Club Gym | Ashford | ✓ | |
| Julie Rose Stadium | Ashford | | ✓ |
| The Gym | Ashford | ✓ | |
| The Stour Centre | Ashford | | ✓ |
| Ashford International Hotel | Ashford | ✓ | |
| Kingsnorth Recreation Centre | Kingsnorth | | ✓ |
| The Green Health Club | Charing | ✓ | |
| Tenterden Leisure Centre | Tenterden | | ✓ |

Source: Various

8.49 Ashford's gym and leisure offer include the Stour Centre, a large multi-activity centre (including sports hall, squash courts, 25m swimming pool and general fitness), which is owned by the Council and run by a not for profit organisation. The same organisation (Ashford Leisure Trust) also manages the Julie Rose Stadium (home to Ashford Athletics Club and including Contours Gym) and the Kingsnorth Recreation Centre (including Contours Gym, sports hall and spin studio). Tenterden also has a Council owned facility – the Tenterden Leisure Centre.

8.50 Ashford has three privately managed gyms including the Park Club Gym in Ashford Town Centre, The Green Health Club in Charing and a gym within the Ashford International Hotel, which is open to public. The Borough also has two branded gyms; including The Gym and Bannatyne at Eureka Leisure Park. Notwithstanding this, it is apparent that despite the Borough's strong population, there is a notable gap in the provision of branded health and fitness clubs. David Lloyd, Fitness First, LA Fitness and Virgin Active for example are not currently represented in the Borough.

8.51 Analysis of the household survey shows that 67.7% of respondents across the Study Area do not go to a gym or health club. Of the 32.8% that do go to the gym, the facilities located in Ashford (though not necessarily within the town centre) had relatively high retention rates, with a further 12% of respondents choosing 'Ashford' generally, the Ashford Bannatyne (4%), and The Gym (6%). The total retention in Ashford Borough is around 66% overall. The most frequented facility was the Stour Centre in Ashford (14%).

8.52 Competitor locations for health and fitness facilities outside of the Borough were:

- Tunbridge Wells (7%);
- Folkestone (8%); and
- Hythe (11%).

8.53 Investment in health and fitness facilities would help to claw back some of this leakage and also have the potential benefit of improving the current participation rate identified by the survey (32.8%).

***Forecast Demand for Health and Fitness***

8.54 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. In this case the Study Area population is estimated to increase by 33,029 by 2030. It is likely that existing facilities will absorb some of this demand, and average membership levels will change over time in line with the constant changes in fitness facility formats.

8.55 Notwithstanding this, there would appear to be capacity to support an increase in leisure provision in the Borough over the medium to long-term. Based on the Study Area average participation rate of 32.4%[40] and Ashford's retention rate of 65.8% identified by the household survey, this would potentially result in an additional 7,042 new gym and health and fitness members over the forecast period. Based on average membership rates for private fitness clubs identified earlier in this section, this would support around 5 new gym facilities in the Borough; although this would fall to 2 new facilities for a larger chain operator such as a David Lloyds.

8.56 As for the other leisure sectors, addressing this forecast capacity will be dependent on the level of market interest and demand. Given that some of the larger chain operators are not represented in the Borough, there may be scope for a new facility. There could also be potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the Borough.

8.57 While Ashford and Tenterden should continue to be the focus of new leisure provision, there may also be an opportunity to link new leisure facilities with future growth areas and strategic transport sites. Around 5% of respondents to the HITS indicated that '*More local sports and recreation facilities'* would improve the leisure offer in the Borough. This response was particularly high amongst respondents in Zones 1a and 1b, which broadly represent the Ashford urban area (8.4% and 13.5% respectively. These

[40] Participation rate identified from the household survey.

zones also had higher participation rates for gyms/ health clubs and sports facilities (40% in Zone 1a and 44% in Zone 1b).

## BINGO & GAMBLING

8.58 Gambling represents a significant and growing element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the Borough, if any, based on the available evidence.

***Market Overview and Current Provision***

8.59 The latest research by *The Gambling Commission* (*Industry Statistics November 2014*) indicates that there are over 653 licensed bingo premises in operation in the UK, which is a reduction of 25 premises over the last12-18 months, despite a previous long term trend of increasing numbers of venues. In the 12 months up to June 2011 some 3.4% of UK adults visited bingo venues, but research by *Mintel* indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming.

8.60 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 including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversity 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.

8.61 In terms of Casinos, research shows that there were some 147 active casinos in the UK in March 2014, which represents an increase by three premises on the previous 12 months. The number of premises has remained fairly static over the past five years[41]. This sector is dominated by three companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casions); and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group's purchase of Gala Coral Casinos making it the largest operator in the UK. The number of admissions to casinos increased substantially by 25% over the five year period up to 2010/11. This

[41] Source: Gambling Commission Industry Statistics November 2014.

growth is largely explained by larger new casino venues granted licences under the 2005 Gambling Act.

8.62 Based on the available evidence, the Borough currently has one bingo club; Mecca Bingo. There are no casinos in the Borough with the most visited casino venue located in Broadstairs (31%). The household survey results indicate that bingo and casino gambling is not a major leisure activity for the majority of respondents living in the Borough, with 12% indicating that they frequent bingo clubs or casinos. Of those that do, a high proportion visit a bingo club or casino once a week (43%). In our judgement, while the provision of one bingo hall in the Borough may suggest an under provision for this activity, the participation rate is very low.

8.63 Similarly, there is unlikely to be sufficient demand to accommodate the introduction of a casino venue. Furthermore, there is unlikely to be demand from casino operators who typically focus new outlets in major leisure destinations.

8.64 In summary, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the Borough's main centres first in accordance with national and local plan policy.

## TEN-PIN BOWLING

8.65 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years and remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK[42].

8.66 This sector benefited from a period of growth from the mid-1990s onwards, 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 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. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets 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, small scale cinema and a venue for bands and live performers/comedy nights.

[42] Tenpin Bowling Market UK, Mintel (November 2012)

8.67 The Borough has one 18-lane ten-pin bowling venue (AMF Bowling) located on Station Road in Ashford Town Centre. The facility includes a licensed bar, a diner and a games area. The competing venues are located in Maidstone (AMF Bowling).

8.68 The household survey indicates that family entertainment (such as tenpin bowling and ice skating) is a reasonably popular leisure activity, with over 30.4% of respondents living in the Study Area indicating that they partake in this activity. The existing tenpin bowling venue in Ashford (AMF Bowling) captures the majority of trips made by residents in the Borough (88%). Of those in the Study Area that do visit family entertainment facilities, they go relatively infrequently with 21% visiting once every two months, 33% visiting once every six months, 24% a year or less.

8.69 In terms of future needs, we consider provision in the Borough is adequately served by the existing Tenpin outlet in Ashford. This is based on the relatively good participation levels at the Borough level and the limited forecast growth in this sector over the short to medium term. However, as the economy strengthens and as the population increases there may be a need for an additional facility over the long term. If this is the case and market demand exists, then a new facility should be directed to the Borough's town centres first to help maintain and strengthen their diversity of offer and evening economies.

**CULTURAL ACTIVITIES**

8.70 The results of the 2014 household telephone survey show that over 62.1% of respondents in the Borough engage in cultural activities such as visiting the theatre, concerts or a music venue and 48% visit museums, galleries or places of historical and/or cultural interest. The household survey confirms that this form of activity is carried out infrequently with the majority of respondents visiting cultural facilities once every three months or less often (63%). Respondents are also more likely to visit music/ theatre venues and also cultural or historical venues in Central London (56% and 79% respectively). This reflects the city's draw as the country's premier leisure and tourist destination, which is easily accessible to residents in Ashford Borough. Marlowe Theatre is also a draw, capturing 28% of this type of activity.

8.71 The household survey showed that relatively few visited museums, galleries or places of historical and/or cultural interest in Ashford Borough (1.5%), the majority of which refer to visits to the Ashford Museum. Tenterden was not noted as a destination for this type of activity. Demand for new cultural facilities (such as theatres) is likely to be limited given the draw to major facilities in Central London. Around 6% of respondents said that a new theatre would improve leisure facilities in the Borough.

## HOTEL PROVISION

8.72 Hotel provision in Ashford Borough includes a range of occupiers, from budget multinationals to niche independents. The majority of provision is focused in and around the settlement of Ashford. However, it is noted that there is relatively little provision located in the town centre. Ashford has a high number of national multiple providers, most of which are out of centre and located in close proximity to junctions serving the M20 motorway. Tenterden has a number of providers and a focus of provision along the main High Street. There are no branded occupiers, and providers in Tenterden tend to be smaller and of a higher quality than those found in Ashford. There are a number of attractive country manor houses that are used as high end hotels and also as events such as weddings. This provision is supplemented by a number of smaller independent bed and breakfasts or guesthouses – of which there were 26 identified through desktop research.

8.73 A location plan of hotel provision identified in the borough around Ashford and Tenterden, including the location of future proposed provision, is included in Appendix 10. The table below highlights the key providers and their comparable size and type.

Table 8.18 **Summary of Hotel Provision in Ashford and Tenterden**

| Name and brand (if applicable) | In Centre/ Out of Centre | Stars | Rooms |
|---|---|---|---|
| **Ashford and surrounding area** | | | |
| Holiday Inn Ashford-Central | Out of centre | Budget | 179 |
| Holiday Inn Ashford - North A20 | Out of centre | Budget | 103 |
| Premier Inn Ashford Central | Out of Centre | Budget | 92 |
| Premier Inn Ashford Eureka Leisure Park | Out of Centre | Budget | 60 |
| Premier Inn Ashford North | Out of Centre | Budget | 74 |
| Travelodge Ashford (Eureka Leisure Park) | Out of Centre | Budget | 60 |
| Ashford International Hotel | Out of Centre | 4 | 179 |
| Eastwell Manor | Out of centre | 4 | 111 |
| The George Hotel | Town Centre | 4 | 14 |
| The Conningbrook Hotel | Out of centre | 3 | 11 |
| Downsview Guest House | Out of centre | n/a | 12 |
| The Croft Hotel | Out of centre | n/a | 29 |
| Boys Hall Manor | Out of centre | n/a | 16 |
| **Tenterden and surrounding area** | | | |
| London Beach Hotel, Spa and Country Club | Out of Centre | 3 | 24 |
| Little Silver Country Hotel | Out of Centre | 3 | 16 |

| Name and brand (if applicable) | In Centre/ Out of Centre | Stars | Rooms |
|---|---|---|---|
| The Woolpack Hotel | Town Centre | n/a | 6 |
| Collina House Hotel | Out of Centre | n/a | 15 |

Source: Various sources
Notes: Star rating provided where available and is based on based on AA ratings, which are supported by tourist authority (VisitBritain).

8.74 Competing centres outside of the borough tend to have a similar offer to Ashford. For example, Folkestone has a range of branded providers like Holiday Inn and Premier Inn in addition to smaller independent providers. The town also has one large hotel – the Grand Burstin Hotel, which has 480 rooms. Larger centres such as Canterbury have a much wider offer, particularly regarding provision within the town centre.

8.75 There is scope to expand Ashford's hotel provision, particularly within Ashford Town Centre. Initial plans for the development of the strategic town centre site at Elwick Place include the provision of a 60 bed hotel. This would be a positive addition to the town's current offer and start to amend the balance of provision that is currently focussed on the International station. Links between Elwick Place and the station should be facilitated, in order to encourage linked trips into the town centre for travellers using the station. There may also be scope to extend the hotel accommodation provision with future expansion of the Outlet Centre, where appropriate.

**SUMMARY**

8.76 As for retailing, the commercial leisure industry faces considerable challenges and pressures even as the economy improves. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.

8.77 The table below shows the percentage of the Study Area's respondents to the household survey who indicated that they do *not* participate in the various leisure activities identified.

Table 8.19 **Respondents in Study Area who do not participate in leisure activities**

| Leisure Activity | Respondents who do *not* participate in leisure activities |
|---|---|
| Eating out in restaurant and/or café | 19.7% |
| Cinema | 37.2% |
| Concert/ theatre/ music venue | 51.5% |
| Drinking out in a pub/ bar/ nightclub | 48.1% |

| Leisure Activity | Respondents who do *not* participate in leisure activities |
|---|---|
| Cultural/historical interest | 58.4% |
| Gym/ Healthclub/ Sports facility | 67.6% |
| Family entertainment (incl. ten pin bowling, skating rink) | 69.5% |
| Bingo/ Casino | 88.4% |

Source: HTIS 2014

8.78 The table shows variation in the popularity of particular commercial leisure activities with eating and drinking out, visiting the cinema and going to a concert/ theatre/ music venue the most popular.

8.79 It also shows that the majority of the Study Area's residents do not normally participate in other commercial leisure activities including going to the gym/ healthclub, visiting a bingo or casino facility or family entertainment such as tenpin bowling.

8.80 Our review of the Borough's commercial leisure sector and offer, and the results of the household survey, indicate that there is a relatively good level of leisure facilities (for example cinema and food and drink), although there is scope to improve the range and quality of this provision. The participation rate for certain leisure activities is particularly high (e.g. restaurants and cinemas) and this offers the potential to enhance the overall offer, subject to market demand. There is clearly potential to improve and strengthen the leisure offer in the Borough's main centres to help stimulate their evening economies and increase "dwell times" during the day to the benefit of other shops, businesses and facilities.

8.81 The assessment indicates that there is potential to support two to five branded health and fitness leisure facilities (depending on the size and type) based on projected population growth. A new operator could assist in improving the Borough's market share of gym/health fitness memberships and increasing participation rates in this particular leisure activity.

8.82 In terms of cinema provision, the assessment found that a high proportion of respondents visit the cinema, and the Ashford Cineworld captures almost all cinema visits in the Study Area (89%). Due to the popularity of this activity and the relative lack of alternative multi-screen provision in the area, we have identified an opportunity to increase the cinema provision in the Borough; with a priority for new screens in Ashford Town Centre. The planned development at Elwick Place, which includes the provision of a new cinema, would help to meet this demand in full. It will also encourage linked trips and increased expenditure across the town centre as a whole to the benefit of other shops and businesses, and Ashford's overall vitality and viability.

8.83 Potential demand has been identified for eating and drinking out. There is potential to enhance food and drink offer in both Ashford and Tenterden as a means of promoting the Borough's day to evening time economy. As a priority, new floorspace for food and

beverage outlets should be directed to Ashford Town Centre with provision directed to Tenterden and strategic growth areas, albeit that delivery will be subject to market demand. Similarly, the provision of new hotel accommodation in the borough should focus on Ashford, particularly on creating new hotel space in the Town Centre. This will be address in part through current proposals for Elwick Place, which include a 60-bed hotel. By promoting hotel provision in the town centre this could support tourism for the town centre and link overnight trips with the Designer Outlet Centre and Eurostar passengers.

8.84 For Ashford Town Centre in particular, improvements to the range and quality of the food and drink offer is important, given the increasing competition it faces from out of town retail parks, which are currently expanding their leisure offer. Ashford Town Centre contains a relatively low representation of key national multiple leisure brands, particularly in the food and drink sector. The promotion of quality food and beverage branded operators in the town centre should be encouraged and the proposals for Elwick Place will help to address this need. In turn, this would strengthen Ashford Town Centre's profile as a retail and leisure destination; helping to increase footfall and dwell times in the town centre. It also provides the potential to encourage shoppers who visit Ashford Town Centre link their shopping trip to Ashford Town Centre. Tenterden has a relatively good level of provision, particularly branded occupiers, for a centre of its size. Maintaining the current high quality of provision should be the focus for leisure occupiers in Tenterden.

# 9.0 SHOPPING FRONTAGE AND RETAL IMPACT THRESHOLD RECOMMENDATIONS

9.1 This section reviews the Council's policy on the existing defined shopping frontages) for Ashford and Tenterden Town Centres. Recommendations are provided on the most appropriate definition of the Primary Shopping Area (PSA) and the introduction of primary shopping frontages (PSFs) and secondary shopping frontages (SSFs) to ensure the vitality and viability of the town centres. In addition, recommendations are provided on an appropriate floorspace threshold for the requirement of retail impact assessments (RIAs) in respect of retail proposals.

## PRIMARY SHOPPING AREA AND SHOPPING FRONTAGES

9.2 To help ensure the vitality of Ashford Town Centre we have considered the most appropriate definition of the primary shopping area (PSA), based on the available evidence and research on the extent of primary shopping frontages (PSFs) and secondary shopping frontages (SSFs). For Tenterden Town Centre we have reviewed the existing defined PSF.

### *Ashford Town Centre*

9.3 The current designations of PSFs identified in the 2000 Local Plan Proposals Map (see Section 5 to this report) cover the southern side of the High Street, between Drum Lane and Bank Street, and the northern side of the High Street, between Castle Street and Wellesley Road. The Council's (1999) surveys showed that these streets had the greatest concentration of Class A1 uses and the highest pedestrian footfall. Policy SH3 of the adopted Local Plan:

41. "With the areas of Ashford Town Centre indicated on the Proposals Map as being primary shopping frontages, change of use and redevelopment proposals will be permitted, provided non-A1 uses would not cumulatively amount to more than 20% of the length of the primary frontage within any of the defined sections".

9.4 In support of this policy the Local Plan (para 8.25) states that restricting Class A2-A3 uses to no more than one-fifth of the total length of these frontages will ensure that a strong concentration of Class A1 shops remains at the heart of the town centre and, in turn, this will help to safeguard the town's role as the main focus for shopping in the Borough.

9.5 It is apparent from both the Council's recent surveys of the town centre, and our audits carried out as part of the town centre health check (see Section 5) that the proportion of Class A1 uses on the High Street has fallen from the higher levels that informed Policy SH3. For example, the Local Plan refers to the fact that 100% of frontages on the southern side of the High Street between Drum Lane and Bank Street were in Class

A1 use, whereas the most recent surveys show that 79% is currently in A1 use. This fall in Class A1 uses reflects national trends and we therefore believe a more flexible and pragmatic policy approach to the definition of primary and secondary shopping frontages is required.

9.6 Notwithstanding this, and based on the Council's surveys and our own audits of the town centre, we broadly agree with the primary shopping frontages identified by the adopted Proposals Map. In our judgement the following primary shopping frontages should be retained as previously defined:

- **The northern side of the High Street, including all the frontages from North Street to New Street**. We estimate that 81% of units on this frontage are in A1 use.
- **The southern side of the High Street, from Drum Lane to Bank Street and including the entrance to County Square**. We estimate that 79% of units on this frontage are currently A1 uses.

9.7 Currently, the northern side of the High Street that runs from North Street to Wellesley Road is also defined as being PSF on the Local Plan Proposals Map. However, in our judgement this section of the High Street should be redefined as SSF. An audit of town centre uses along this frontage shows that 62% of units are currently in Class A1 use, with the remainder (38%) accommodating a mix of A2-A5 uses. We therefore consider that it is more appropriate to define this lower part of the High Street as SSF.

9.8 We note that the adopted Local Plan and Proposals Map do not include County Square in the PSF, even though this managed shopping centre is clearly the main focus for major national multiples and Class A1 retailers in the town centre. The adopted plan states that changes of use away from A1 uses are unlikely to occur here as "*they would not be in the interests of the owner of the shopping centre and therefore a frontage policy would serve no purpose*" (para 8.24). We recommend that the PSF includes internal frontages on the ground floor level of the shopping centre as well as the external frontage of the Debenhams store on Elwick Road/ Bank Street. However, we advise that policy allows for some flexibility for the shopping centre to accommodate appropriate management and letting of space to prospective tenants.

9.9 The plan attached to **Appendix 11** of this study shows our recommended PSFs. In our judgement, based on the evidence, we advise that the PSF threshold should be reduced to allow no more than 30% of units to be occupied by non-A1 uses. The Council may also want to consider including wording in any policy to prevent more than three contiguous frontages being non-Class A1 uses and retaining shop frontage appearances.

9.10 In terms of the definition of SSFs, if Elwick Place is permitted by the Council, then Bank Street will also function (along with County Square) as an important pedestrian link between the proposed leisure-led scheme and the High Street. Bank Street should benefit from increased footfall and activity, and this in turn should help to revitalise

both the southern and northern ends of the street. Currently the western side of Bank Street, from High Street to the County Square entrance has 62% Class A1 unit and from County Square to Middle Street has 50% A1 uses. On this basis we consider that Bank Street has the characteristics of a secondary shopping frontage.

9.11 The plan in **Appendix 11** also shows our definition of other key secondary shopping frontages in the town centre that we believe make an important contribution to the overall vitality and viability of the centre as a whole. These frontages provide greater opportunities for a diversity of uses, including restaurants, other town centre uses and other businesses in accordance with the NPPF. Although we do not recommend the use of a threshold as for SSFs, we consider that a more flexible policy is needed to enable the local planning authority to determine applications for a change of use on a case by case basis after assessing the proposal in the context of the existing uses on that part of the street and across the rest of the town centre. Policy should also prevent the concentration or coalescence of certain uses that would harm the overall character, vitality and viability of the town centre.

9.12 A key benefit of defining the PSF for Ashford Town Centre is that provides the Council with some control over Permitted Development Rights for the change of use of existing A1/A2 retail units (under 150 $m^2$ gross internal area) to residential use (C3). As part of the Prior Approval process, proposals are assessed against the potential impact of the loss of the A1/A2 use on the economic health of the town centre (alongside other considerations relating flood risk, transport/parking and contamination). Exemptions to PDR include listed building and properties within article 1(5) land, which includes conservation areas. It should be noted that the defined conservation area for Ashford Town Centre covers the PSA.

9.13 In accordance with the NPPF and NPPG the Council will have also identified the town's Primary Shopping Area (PSA). This is defined as the area where retail uses and development are concentrated, and generally comprises PSFs and those SSFs that are adjoining and closely related to the PSF. At this stage we advise that the PSA should include all the defined PSFs and should be extended to include the SSFs at Bank Street and North Street, as identified by the Plan in **Appendix 11**.

***Tenterden Town Centre***

9.14 The current designations of the primary shopping frontages for Tenterden Town Centre are set out in the adopted 2010 *Tenterden and Rural Sites DPD*. The two identified primary frontages cover the properties from Bridewell Lane to Recreation Ground Road on the south side of the High Street, and from Station Road to East Cross on the north side. Policy TRS15 states that:

9.15 "Within the area of Tenterden town centre indicated on the Proposals Map as forming the two primary shopping frontages, changes of use from Class A1 uses to non-A1 uses will be permitted provided the non-A1 uses would not cumulatively amount to more

than 35% of the length of particular primary frontages within which the respective shop unit lies"

9.16 This policy was informed by the shop front statistics set out in the DPD which indicated at the time that approximately 65% of frontages on the north side of the High Street (from Station Road to East Cross) were accounted for by Class A1 uses, and 55% on the south side (from Bridewell Lane to Recreation Ground Road) were Class A1 uses. Although the DPD found (paragraph 7.63) that the presence of non-A1 retail uses in the High Street were not at a level likely to seriously affect the vitality of the town centre, it was consider essential to ensure that the quality, character and economic viability of Tenterden was not undermined through the possible future loss of Class A1 shops.

9.17 Based on our own audit of existing use classes in Tenterden we consider that the current PSF definitions set out in the DPD (Policy TRS15) are still appropriate based on the scale, mix and quality of uses on the High Street. Although our recent audit is based on outlets, rather than the length of frontages previously defined by the local planning authority, it shows that approximately 73% of outlets on the north side of the High Street and 65% on the south side are within the Use Class A1. We therefore advise the Council that maintaining the current 65% threshold for Class A1 uses would be appropriate in this case, as the current mix of uses make an important contribution to the overall vibrancy and attraction of the high street.

9.18 Following consultation with the Council it was agreed that a secondary shopping frontage policy is not required for the town centre given that town centre uses are predominantly covered within the PSF.

9.19 As discussed previously, the defined PSF will allow the Council to manage Permitted Development Rights retail to residential use more effectively. However, given that the entirety of town centre is within a conservation area, this in itself removes the potential for Permitted Development Rights.

9.20 In terms of the definition of a Primary Shopping Area (PSA), we also consider that the area defined in the DPD Proposals Map for Tenterden is appropriate. For reference, the defined PSA largely includes the PSFs on High Street and extends to include the Waitrose store and Sayers Lane.

## IMPACT ASSESSMENT: LOCAL FLOORSPSPACE THRESHOLD

9.21 Finally, we have reviewed whether there is a policy requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 $m^2$ gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.

9.22 The *National Planning Practice Guidance* (NPPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

9.23 Although the quantitative and qualitative research evidence shows that Ashford and Tenterden Town Centres perform different, largely complementary roles and functions in the Borough's network and hierarchy of centres, it is apparent that they are both potentially vulnerable to increasing competition from out-of-centre retailing and the growth of internet shopping. From our discussions with certain stakeholders and landowners in the town centres it is also clear that some are concerned that existing retailers in these towns, and principally Ashford Town Centre, could choose to take space in larger more modern units in out-of-centre locations as and when their current leases expire.

9.24 In terms of the scale of new commitments relative to the Borough's main town centres, the planning pipeline evidence shows that they range from smaller retail units of circa 100 $m^2$ net, up to substantially larger stores and schemes of over 1,500 $m^2$ net (including, for example, the planned new foodstores at Cheeseman's Green and Chilmington Green, and the new comparison goods floorspace on the former McLaren Food site at Beavor Road). Furthermore the application currently before the Council for the extension of Ashford Designer Outlet is proposing an estimated 6,665$m^2$ net of new comparison good floorspace.

9.25 Our assessment of retail trends has also highlighted the fact that modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) have requirements for larger format shop units with a minimum floorspace of between 500 $m^2$ and 1,000 $m^2$ gross. This scale of floorspace provides operators with the necessary minimum 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 500 $m^2$ gross are also unlikely to trade as a purely local facility[43].

43 According to the Sunday Trading laws a 'large shop' is defined as being over 280$m^2$ gross. This provides a broad indication at the national level as to what constitutes a 'large shop' capable of generating a reasonable amount of trade (and, therefore, the potential to result in an impact on shopping patterns).

9.26 The assessment of current trends in the food/grocery sector has also highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores with an average gross floorspace of circa 500m$^2$. In circumstances where these smaller stores are proposed on the edge or outside of smaller district, local and village centres, they could have a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where the existing centres are dependent on convenience ('top-up') shopping to help anchor to their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.

9.27 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 500m$^2$ gross and above to demonstrate that they will not have a significant adverse impact on Ashford and Tenterden Town Centres, either on their own or cumulatively with other commitments in the area, in accordance with the NPPF.

9.28 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.

9.29 We also consider that a 500 m$^2$ impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).

9.30 Notwithstanding the use of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis.

# GLOSSARY & ABBREVIATIONS

| | |
|---|---|
| CITY CENTRES: | The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. |
| TOWN CENTRES: | Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. |
| DISTRICT CENTRES: | District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. |
| LOCAL CENTRES: | Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. |
| TOWN CENTRE USES: | Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities). |
| TOWN CENTRE BOUNDARY: | Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map. |
| PRIMARY SHOPPING AREA (PSA) | Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. |
| PRIMARY & SECONDARY FRONTAGES | Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses. |
| EDGE-OF-CENTRE | For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. |
| OUT-OF-CENTRE | A location which is not in or on the edge of a centre but not necessarily outside the urban area. |
| OUT-OF-TOWN | A location out of centre that is outside the existing urban area. |

| | |
|---|---|
| CONVENIENCE SHOPPING | Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery. |
| SUPERMARKETS | Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking. |
| SUPERSTORES | Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking. |
| COMPARISON SHOPPING | Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods. |
| RETAIL WAREHOUSES | Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers. |
| RETAIL PARKS | An agglomeration of at least 3 retail warehouses. |
| WAREHOUSE CLUBS | Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual. |
| FACTORY OUTLET CENTRES | Groups of shops specialising in selling seconds and end-of-line goods at discounted prices. |
| REGIONAL & SUB-REGIONAL SHOPPING CENTRES | Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores. |
| LEISURE PARKS | Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking. |
| CONVENIENCE GOODS EXPENDITURE | Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods. |
| COMPARISON GOODS EXPENDITURE | Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects. |
| SPECIAL FORMS OF TRADING | All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls. |
| GROSS GROUND FLOOR FOOTPRINT FLOORSPACE | The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally. |
| GROSS RETAIL FLOORSPACE | The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods. |
| NET RETAIL SALES AREA | The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts. |
| RETAIL SALES | Convenience goods, comparison goods or all goods retail sales (stated as including |

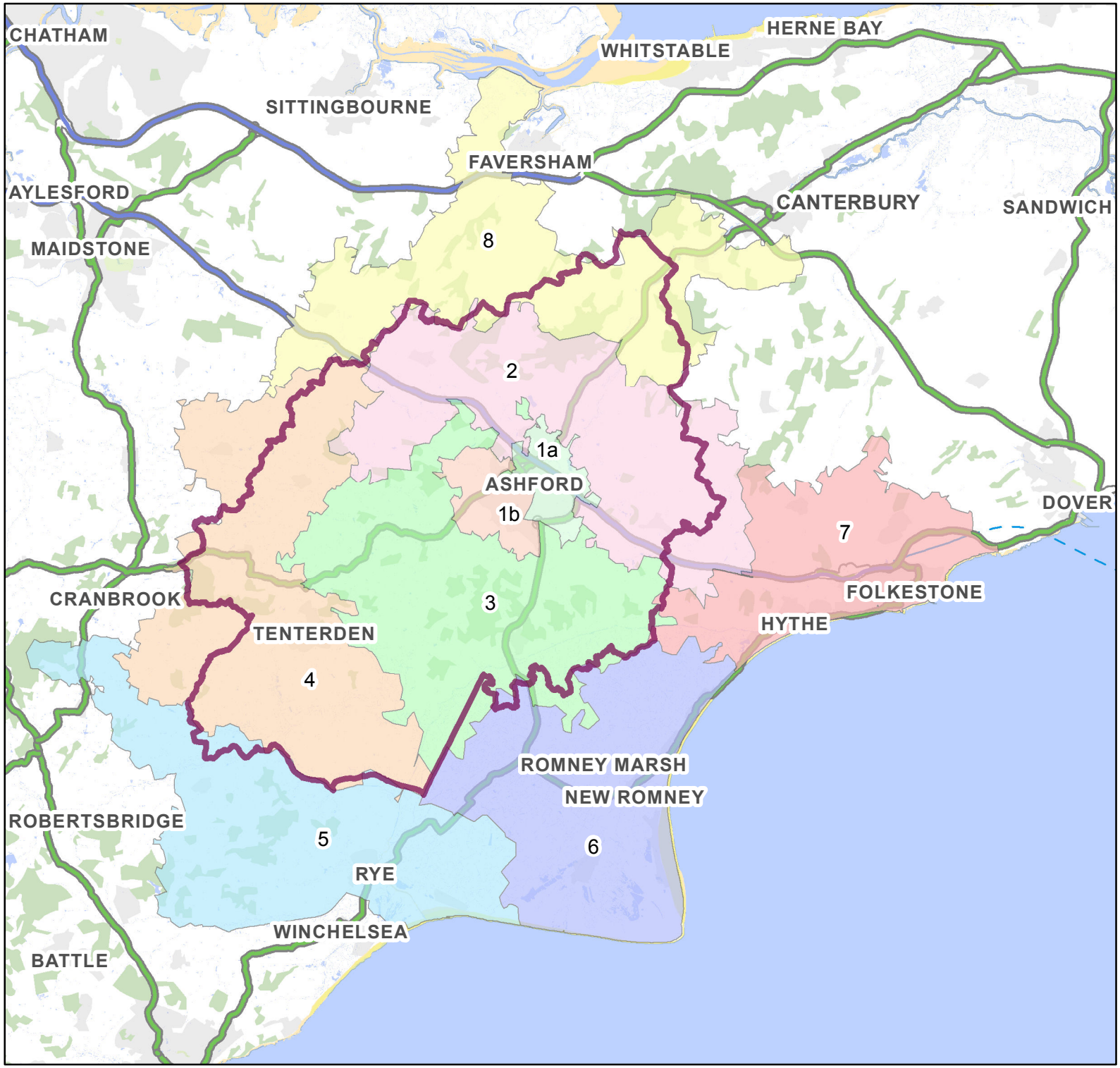
| | |
|---|---|
| DENSITY | or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales. |
| FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY' ) GROWTH | The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure. |
| QUANTITATIVE NEED | Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area. |
| QUALITATIVE NEED | Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need. |
| OVERTRADING | The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity). |
| BENCHMARK TURNOVER | In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts. |

– END –

# APPENDIX 1: STUDY AREA

# Ashford Retail & Leisure Needs Assessment

## Study Area and Zones




**Study Zone**

- 1a
- 1b
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- Ashford Borough

Carter Jonas

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Ordnance Survey © Crown copyright 2011

# APPENDIX 2: NEMS SURVEY METHODOLOGY

NEMS market research
22-23 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

# Ashford Household Survey
# for
# Planning Perspectives

December 2014

Job Ref: 051214

This market research and the design of material used to obtain this survey information have been originated by and belong to NEMS market research, and may not be used or reproduced in whole or part without the company's written consent, or that of the Client.

# Introduction

## 1.1 Research Background & Objectives

To conduct a survey amongst residents in the Ashford area to assess shopping habits for main food and grocery, top-up, non-food shopping and leisure activities.

## 1.2 Research Methodology

A total of 1,004 telephone interviews were conducted between Friday 5th December 2014 and Wednesday 17th December 2014. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

## 1.3 Sampling

### 1.3.1 Survey Area

The survey area was segmented into 9 zones, defined using postcode sectors. The zone details were:

| Zone | Postcode Sectors | Number of Interviews |
|---|---|---|
| 1A | TN23 1, TN24 0, TN24 8, TN24 9 | 100 |
| 1B | TN23 3, TN23 4, TN23 5, TN23 6, TN23 7 | 100 |
| 2 | TN25 4, TN25 5, TN25 6, TN27 0 | 114 |
| 3 | TN25 7, TN26 1, TN26 2, TN26 3 | 115 |
| 4 | TN17 4, TN27 8, TN27 9, TN30 6, TN30 7 | 114 |
| 5 | TN18 5, TN31 6, TN31 7 | 118 |
| 6 | TN28 8, TN29 0, TN29 9 | 115 |
| 7 | CT18 7, CT18 8, CT19 4, CT19 5, CT19 6, CT20 1, CT20 2, CT20 3, CT21 4, CT21 5, CT21 6 | 114 |
| 8 | CT 4 7, CT 4 8, ME13 0, ME17 2 | 114 |
| **Total** | | **1,004** |

### 1.3.2 Telephone Numbers

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers (land-lines and some mobile numbers) but is supplemented with ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers sample. Ex-directory numbers are randomly generated using the published numbers as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

### 1.3.3 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main-shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly

updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next random selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

### 1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

### 1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

## 1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

| Age | Main Shopper Profile (%) | Interviews Achieved | Age Weightings |
|---|---|---|---|
| 18-24 | 4.79% | 15 | 3.1410 |
| 25-34 | 13.96% | 31 | 4.4149 |
| 35-44 | 16.94% | 107 | 1.5527 |
| 45-54 | 18.22% | 218 | 0.8200 |
| 55-64 | 19.13% | 211 | 0.8892 |
| 65+ | 26.96% | 399 | 0.6629 |
| (Refused) | n/a | 23 | 1.0000 |
| **Total** | | **1,004** | |

Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

| Zone | Population * | Interviews Achieved | Interviews Achieved (Weighted by Age) | Zone Weightings |
|---|---|---|---|---|
| 1A | 26,407 | 100 | 105 | 1.2063 |
| 1B | 28,874 | 100 | 126 | 1.1006 |
| 2 | 14,289 | 114 | 97 | 0.7024 |
| 3 | 10,920 | 115 | 99 | 0.5294 |
| 4 | 17,513 | 114 | 110 | 0.7619 |
| 5 | 13,657 | 118 | 119 | 0.5508 |
| 6 | 18,819 | 115 | 113 | 0.7978 |
| 7 | 67,213 | 114 | 130 | 2.4766 |
| 8 | 11,963 | 114 | 106 | 0.5424 |
| **Total** | **209,655** | **1,004** | | |

* Source: Census 2011

## 1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

*For example, if 50% of a sample of 1,004 answers "Yes" to a question, we can be 95% sure that between 46.9% and 53.1% of the population holds the same opinion (i.e. +/- 3.1%).* The following is a guide showing confidence intervals attached to various sample sizes from the study:

| %ge Response | 95% confidence interval |
|---|---|
| 10% | ±1.9% |
| 20% | ±2.5% |
| 30% | ±2.8% |
| 40% | ±3.0% |
| 50% | ±3.1% |

## 1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero per cent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

# APPENDIX 3: HTIS SURVEY RESULTS (WEIGHTED)

# APPENDIX 4: CONVENIENCE GOODS MARKET SHARE ANALYSIS

**TABLE 1: ALL FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 3.2% | 10.8% | 3.2% | 2.6% | 0.7% | 0.2% | 1.0% | 0.0% | 1.5% | 2.4% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 5.1% | 1.1% | 3.5% | 2.7% | 2.5% | 1.0% | 0.2% | 0.0% | 0.5% | 1.5% |
| Farmfoods, New Street | 0.5% | 0.0% | 0.0% | 0.3% | 0.3% | 0.1% | 0.1% | 0.0% | 0.4% | 0.1% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 9.8% | 20.0% | 1.9% | 4.8% | 1.6% | 4.9% | 4.5% | 0.8% | 2.1% | 5.4% |
| Sainsbury's, Simone Weil Avenue | 27.8% | 10.3% | 21.2% | 14.1% | 3.4% | 1.5% | 6.8% | 0.1% | 14.2% | 9.0% |
| Tesco Extra, Kingsnorth | 6.8% | 28.8% | 7.5% | 29.0% | 7.1% | 5.0% | 10.5% | 0.0% | 1.1% | 8.8% |
| Tesco Extra, Hythe Road, Crooksfoot | 20.3% | 7.9% | 20.0% | 5.2% | 0.5% | 0.4% | 3.1% | 0.1% | 0.3% | 5.7% |
| Waitrose, Repton Park | 3.1% | 4.2% | 8.2% | 7.6% | 2.1% | 0.1% | 0.0% | 0.1% | 3.9% | 2.5% |
| Tesco Extra, Willesborough | 1.8% | 0.3% | 1.2% | 3.6% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| Tesco Express, Mace Lane | 0.6% | 0.0% | 0.0% | 0.0% | 0.9% | 0.6% | 0.0% | 0.0% | 0.5% | 0.2% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.7% | 0.2% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.6% | 3.9% | 18.3% | 4.7% | 0.6% | 0.0% | 0.0% | 2.4% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.9% | 32.5% | 8.8% | 0.4% | 0.3% | 0.0% | 4.2% |
| Other | 0.2% | 0.0% | 0.0% | 0.4% | 4.3% | 0.3% | 0.0% | 0.0% | 0.0% | 0.5% |
| ASHFORD OTHER - VILLAGES: | 8.0% | 2.5% | 7.4% | 5.8% | 3.2% | 0.6% | 0.2% | 0.0% | 2.7% | 2.7% |
| CANTERBURY: | 0.0% | 2.6% | 1.4% | 0.1% | 0.0% | 0.0% | 0.7% | 3.5% | 23.9% | 3.0% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 1.6% | 0.4% | 0.5% |
| FOLKESTONE: | 0.5% | 1.2% | 1.5% | 0.5% | 0.7% | 0.5% | 9.4% | 67.1% | 4.6% | 21.9% |
| HASTINGS: | 0.2% | 0.0% | 0.2% | 0.0% | 0.0% | 10.4% | 0.0% | 0.0% | 0.0% | 0.8% |
| HYTHE: | 0.2% | 0.3% | 4.2% | 1.2% | 0.7% | 0.2% | 15.7% | 18.1% | 0.0% | 7.4% |
| MAIDSTONE: | 0.0% | 0.0% | 0.9% | 0.0% | 3.2% | 0.0% | 0.0% | 0.0% | 4.7% | 0.7% |
| SFT/INTERNET | 10.3% | 8.4% | 4.8% | 2.1% | 5.2% | 9.8% | 7.8% | 4.2% | 6.6% | 6.3% |
| ALL OTHER SHOPS & STORES: | 1.6% | 1.6% | 11.8% | 10.2% | 12.0% | 50.9% | 39.0% | 4.0% | 28.7% | 13.0% |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 2: MAIN FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 0.95% | 10.64% | 2.32% | 0.00% | 0.00% | 0.00% | 0.73% | 0.00% | 1.40% | 1.89% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 2.48% | 0.71% | 3.42% | 2.73% | 1.63% | 1.47% | 0.00% | 0.00% | 0.00% | 1.01% |
| Farmfoods, New Street | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.63% | 0.04% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 11.27% | 17.84% | 1.63% | 5.63% | 1.21% | 5.89% | 5.10% | 0.00% | 2.31% | 5.35% |
| Sainsbury's, Simone Weil Avenue | 33.05% | 6.17% | 25.42% | 15.62% | 3.84% | 2.10% | 9.15% | 0.00% | 20.42% | 9.99% |
| Tesco Extra, Kingsnorth | 9.04% | 30.38% | 9.84% | 35.97% | 10.40% | 7.29% | 12.00% | 0.00% | 1.62% | 10.35% |
| Tesco Extra, Hythe Road, Crooksfoot | 24.96% | 11.27% | 25.88% | 6.63% | 0.75% | 0.57% | 3.94% | 0.00% | 0.00% | 7.24% |
| Waitrose, Repton Park | 1.42% | 3.74% | 7.82% | 6.78% | 2.84% | 0.00% | 0.00% | 0.00% | 4.20% | 2.05% |
| Tesco Extra, Willesborough | 2.20% | 0.53% | 1.39% | 4.48% | 0.61% | 0.00% | 0.00% | 0.00% | 0.00% | 0.73% |
| Tesco Express, Mace Lane | 0.00% | 0.00% | 0.00% | 0.00% | 1.42% | 0.00% | 0.00% | 0.00% | 0.63% | 0.15% |
| Tesco, Grovewood Drive North, Weavering | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 2.25% | 0.13% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.00% | 0.00% | 0.93% | 3.80% | 21.00% | 5.13% | 0.73% | 0.00% | 0.00% | 2.41% |
| Tesco, Smallhythe Road | 0.00% | 0.00% | 0.00% | 5.40% | 36.28% | 11.47% | 0.00% | 0.51% | 0.00% | 4.21% |
| Other | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| ASHFORD OTHER - VILLAGES: | 0.00% | 0.53% | 2.56% | 2.28% | 1.96% | 0.76% | 0.00% | 0.00% | 3.09% | 0.75% |
| CANTERBURY: | 0.00% | 4.06% | 1.63% | 0.00% | 0.00% | 0.00% | 0.79% | 3.05% | 22.43% | 3.01% |
| DOVER: | 0.00% | 0.00% | 0.00% | 0.00% | 0.61% | 0.00% | 0.00% | 1.71% | 0.63% | 0.64% |
| FOLKESTONE: | 0.00% | 1.37% | 2.32% | 0.68% | 0.61% | 0.76% | 10.73% | 71.76% | 7.15% | 24.97% |
| HASTINGS: | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 13.07% | 0.00% | 0.00% | 0.00% | 0.84% |
| HYTHE: | 0.00% | 0.00% | 4.30% | 0.91% | 0.75% | 0.00% | 16.57% | 17.13% | 0.00% | 7.41% |
| MAIDSTONE: | 0.00% | 0.00% | 0.00% | 0.00% | 2.63% | 0.00% | 0.00% | 0.00% | 3.57% | 0.42% |
| SFT/INTERNET | 14.65% | 12.76% | 7.06% | 3.19% | 7.02% | 13.19% | 10.78% | 5.85% | 9.55% | 9.09% |
| ALL OTHER SHOPS & STORES: | 0.00% | 0.00% | 3.49% | 5.89% | 6.46% | 38.30% | 29.50% | 0.00% | 20.14% | 7.35% |
| TOTAL: | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

**TABLE 3: OTHER MAIN FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 5.7% | 7.1% | 5.4% | 9.9% | 6.5% | 2.2% | 0.7% | 0.0% | 5.6% | 3.4% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 10.4% | 4.4% | 7.2% | 4.9% | 4.3% | 0.0% | 2.2% | 0.0% | 3.3% | 3.2% |
| Farmfoods, New Street | 3.0% | 0.0% | 0.0% | 0.0% | 3.1% | 1.1% | 0.8% | 0.0% | 0.0% | 0.7% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 9.1% | 23.6% | 8.6% | 7.7% | 8.0% | 8.1% | 5.6% | 0.0% | 2.1% | 7.0% |
| Sainsbury's, Simone Weil Avenue | 25.9% | 26.4% | 18.0% | 22.9% | 9.0% | 0.0% | 8.6% | 0.0% | 6.4% | 10.9% |
| Tesco Extra, Kingsnorth | 3.0% | 20.8% | 0.0% | 16.6% | 3.6% | 2.1% | 15.5% | 0.0% | 0.9% | 6.1% |
| Tesco Extra, Hythe Road, Crooksfoot | 15.9% | 0.8% | 16.0% | 3.2% | 0.0% | 0.0% | 1.6% | 0.7% | 3.3% | 3.7% |
| Waitrose, Repton Park | 9.6% | 6.5% | 13.4% | 11.9% | 2.8% | 1.1% | 0.0% | 0.7% | 6.7% | 4.3% |
| Tesco Extra, Willesborough | 1.9% | 0.0% | 3.2% | 4.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.5% | 0.0% | 0.0% | 1.2% | 0.4% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% | 0.2% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 4.6% | 13.1% | 10.8% | 0.0% | 0.0% | 0.0% | 1.7% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.0% | 21.4% | 3.5% | 0.8% | 0.0% | 0.0% | 2.0% |
| Other | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASHFORD OTHER - VILLAGES: | 4.3% | 0.8% | 10.8% | 5.1% | 5.4% | 0.0% | 0.7% | 0.0% | 4.2% | 2.1% |
| CANTERBURY: | 0.0% | 0.0% | 1.3% | 0.9% | 0.0% | 0.0% | 0.9% | 3.8% | 23.8% | 2.7% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.4% |
| FOLKESTONE: | 1.0% | 3.0% | 0.0% | 0.9% | 3.1% | 0.0% | 13.8% | 59.1% | 0.0% | 23.3% |
| HASTINGS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% | 0.8% |
| HYTHE: | 1.9% | 1.4% | 7.7% | 1.2% | 2.2% | 1.9% | 30.5% | 22.9% | 0.0% | 12.4% |
| MAIDSTONE: | 0.0% | 0.0% | 2.2% | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 3.6% | 0.4% |
| SFT/INTERNET | 7.4% | 0.8% | 2.1% | 0.0% | 6.1% | 4.0% | 2.2% | 4.3% | 0.0% | 3.5% |
| ALL OTHER SHOPS & STORES: | 0.8% | 4.3% | 3.9% | 1.3% | 9.6% | 45.2% | 16.3% | 7.4% | 34.2% | 10.0% |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 4: TOP UP FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 2.7% | 6.0% | 5.5% | 2.3% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 1.7% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 5.3% | 0.0% | 1.4% | 3.2% | 3.3% | 0.0% | 0.0% | 0.0% | 1.0% | 1.1% |
| Farmfoods, New Street | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 6.5% | 25.6% | 0.0% | 2.2% | 0.0% | 0.0% | 2.7% | 0.0% | 0.0% | 4.1% |
| Sainsbury's, Simone Weil Avenue | 18.2% | 17.3% | 7.0% | 2.2% | 0.0% | 0.8% | 0.0% | 0.0% | 2.1% | 4.8% |
| Tesco Extra, Kingsnorth | 3.9% | 24.4% | 7.4% | 15.1% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 4.8% |
| Tesco Extra, Hythe Road, Crooksfoot | 14.4% | 3.3% | 10.6% | 3.4% | 0.0% | 0.0% | 2.5% | 0.0% | 0.0% | 3.2% |
| Waitrose, Repton Park | 3.9% | 5.8% | 7.1% | 4.5% | 0.0% | 0.0% | 0.0% | 0.0% | 3.6% | 2.0% |
| Tesco Extra, Willesborough | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| Tesco Express, Mace Lane | 3.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 11.6% | 0.8% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 4.5% | 18.7% | 2.0% | 0.9% | 0.0% | 0.0% | 1.5% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 8.8% | 33.5% | 4.8% | 0.7% | 0.0% | 0.0% | 2.8% |
| Other | 1.3% | 0.0% | 0.0% | 2.7% | 8.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% |
| ASHFORD OTHER - VILLAGES: | 31.8% | 12.8% | 15.3% | 20.8% | 9.5% | 0.8% | 1.0% | 0.0% | 2.1% | 8.1% |
| CANTERBURY: | 0.0% | 0.0% | 1.4% | 0.0% | 0.0% | 0.0% | 0.7% | 6.0% | 25.9% | 3.7% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.4% | 0.0% | 0.9% |
| FOLKESTONE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.5% | 59.3% | 0.0% | 21.5% |
| HASTINGS: | 1.3% | 0.0% | 1.4% | 0.0% | 0.0% | 1.9% | 0.0% | 0.0% | 0.0% | 0.4% |
| HYTHE: | 0.0% | 1.2% | 0.0% | 1.3% | 0.0% | 0.0% | 6.0% | 16.9% | 0.0% | 6.9% |
| MAIDSTONE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 0.1% |
| SFT/INTERNET | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.6% | 3.9% | 0.0% | 2.4% | 0.9% |
| ALL OTHER SHOPS & STORES: | 4.0% | 3.6% | 40.5% | 28.8% | 26.0% | 84.2% | 75.5% | 15.4% | 50.0% | 29.0% |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 5: OTHER TOP UP FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 15.9% | 22.5% | 3.7% | 13.0% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 5.5% |
| | | | | | | | | | | |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 16.8% | 1.8% | 3.0% | 0.0% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.2% |
| Farmfoods, New Street | 0.0% | 0.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| | | | | | | | | | | |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 6.3% | 22.1% | 0.0% | 0.0% | 0.0% | 3.1% | 2.2% | 8.0% | 3.7% | 7.7% |
| Sainsbury's, Simone Weil Avenue | 10.0% | 10.5% | 17.8% | 13.7% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 4.5% |
| Tesco Extra, Kingsnorth | 0.0% | 32.9% | 0.0% | 16.6% | 0.0% | 0.0% | 8.6% | 0.0% | 0.0% | 5.9% |
| Tesco Extra, Hythe Road, Crooksfoot | 2.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Waitrose, Repton Park | 6.6% | 2.2% | 7.4% | 13.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.9% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 2.8% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.6% | 17.5% | 3.1% | 2.2% | 0.0% | 0.0% | 1.3% |
| Other | 0.0% | 0.0% | 0.0% | 0.0% | 30.0% | 3.1% | 0.0% | 0.0% | 0.0% | 1.4% |
| | | | | | | | | | | |
| ASHFORD OTHER - VILLAGES: | 28.5% | 1.8% | 23.8% | 6.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% |
| | | | | | | | | | | |
| CANTERBURY: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.8% | 30.9% | 2.6% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE: | 3.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 6.3% | 56.6% | 0.0% | 26.2% |
| HASTINGS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 0.0% | 0.0% | 0.0% | 0.1% |
| HYTHE: | 0.0% | 0.0% | 6.0% | 2.8% | 0.0% | 0.0% | 10.0% | 21.5% | 0.0% | 11.0% |
| MAIDSTONE: | 0.0% | 0.0% | 7.1% | 0.0% | 13.5% | 0.0% | 0.0% | 0.0% | 18.4% | 1.7% |
| | | | | | | | | | | |
| SFT/INTERNET | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| ALL OTHER SHOPS & STORES: | 9.6% | 6.3% | 31.1% | 19.5% | 29.0% | 88.2% | 68.9% | 9.6% | 47.1% | 22.8% |
| | | | | | | | | | | |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

# APPENDIX 5: COMPARISON GOODS MARKET SHARE ANALYSIS

**TABLE 1: ALL COMPARISON GOOODS - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 47.3% | 51.5% | 44.1% | 38.9% | 23.0% | 8.9% | 24.7% | 2.7% | 9.6% | 24.4% |
| **ASHFORD EDGE-OF-CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 6.0% | 4.3% | 2.8% | 6.5% | 4.3% | 6.2% | 6.8% | 5.1% | 1.0% | 4.9% |
| **ASHFORD OUT-OF-CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Ashford Business (Retail) Park | 4.9% | 1.5% | 1.7% | 4.9% | 1.8% | 1.2% | 3.1% | 0.5% | 0.8% | 1.9% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.1% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.1% | 0.1% | 0.0% | 0.0% | 0.1% | 0.1% | 0.0% | 0.1% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 3.5% | 4.5% | 4.8% | 5.0% | 3.6% | 1.9% | 3.7% | 0.3% | 1.5% | 2.7% |
| Gallager Retail Park, Norman Road | 2.1% | 4.6% | 2.7% | 4.3% | 2.3% | 1.0% | 4.1% | 0.2% | 1.3% | 2.1% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 1.1% | 2.2% | 1.7% | 2.1% | 1.4% | 0.2% | 1.0% | 0.4% | 0.6% | 1.1% |
| Matalan, Brookefield Road | 0.2% | 0.0% | 0.3% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Orbital Trade Park, Ashford | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.3% | 0.9% | 0.2% | 0.2% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.2% |
| Sainsbury's, Simone Weil Ave, Warren RP | 2.3% | 0.0% | 0.1% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.4% |
| ASDA, Kimberley Way | 0.1% | 0.5% | 0.0% | 0.2% | 0.0% | 0.7% | 0.7% | 0.0% | 0.2% | 0.2% |
| Tesco Extra, Kingsnorth | 0.9% | 2.5% | 0.0% | 1.5% | 0.4% | 0.0% | 0.1% | 0.2% | 0.1% | 0.6% |
| Tesco Extra, Hythe Road, Crooksfoot | 1.1% | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.2% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| All Comparison Goods: | 0.5% | 0.4% | 0.8% | 4.9% | 20.6% | 3.3% | 0.3% | 0.1% | 0.0% | 2.8% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 1.0% | 1.7% | 2.2% | 1.1% | 1.4% | 0.0% | 1.3% | 0.0% | 1.6% | 0.9% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.7% | 0.9% | 1.7% | 1.0% | 0.6% | 0.1% | 0.4% | 1.0% | 2.6% | 1.0% |
| CANTERBURY TOWN CENTRE: | 4.9% | 4.4% | 10.9% | 7.3% | 4.9% | 0.4% | 4.3% | 12.3% | 36.8% | 9.3% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 2.0% | 0.2% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.1% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 6.2% | 0.4% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.9% | 0.5% | 2.2% | 1.0% | 0.0% | 0.0% | 12.2% | 46.3% | 0.0% | 15.1% |
| FOLKESTON OUT OF CENTRE: | 0.2% | 1.0% | 0.1% | 0.1% | 0.2% | 0.0% | 0.1% | 5.1% | 0.0% | 1.7% |
| HASTINGS/ ST LEONARDS: | 0.1% | 0.0% | 0.0% | 0.0% | 1.1% | 22.7% | 0.2% | 0.0% | 0.0% | 1.8% |
| HYTHE: | 0.0% | 0.1% | 1.2% | 1.4% | 0.2% | 0.0% | 2.5% | 5.0% | 0.1% | 1.9% |
| LONDON: | 0.8% | 0.3% | 0.5% | 0.9% | 1.9% | 1.2% | 0.1% | 1.0% | 0.6% | 0.9% |
| MAIDSTONE TOWN CENTRE: | 0.6% | 2.5% | 1.5% | 0.2% | 8.6% | 0.0% | 1.2% | 0.4% | 19.3% | 2.8% |
| MAIDSTONE OUT OF CENTRE: | 0.2% | 0.6% | 0.3% | 0.2% | 0.1% | 0.0% | 0.4% | 0.6% | 0.0% | 0.3% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.5% | 1.5% | 14.7% | 0.2% | 0.0% | 0.2% | 1.3% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 18.9% | 14.4% | 17.0% | 13.6% | 18.3% | 21.2% | 20.1% | 17.5% | 10.6% | 17.1% |
| **ALL OTHER SHOPS & STORES:** | 1.2% | 0.7% | 2.5% | 2.0% | 2.9% | 7.7% | 11.6% | 0.7% | 4.1% | 2.8% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 8.5% | 10.1% | 18.7% | 12.6% | 19.4% | 47.5% | 21.9% | 72.1% | 68.1% | 37.3% |

**TABLE 2: CLOTHING AND FOOTWEAR - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 50.4% | 53.7% | 45.2% | 38.8% | 20.0% | 11.5% | 33.8% | 4.3% | 7.3% | 26.1% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 16.3% | 13.0% | 6.6% | 18.0% | 13.5% | 16.2% | 23.0% | 16.8% | 2.4% | 14.7% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 0.0% | 0.0% | 0.0% | 1.7% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Matalan, Brookefield Road | 0.8% | 0.0% | 1.0% | 1.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Sainsbury's, Simone Weil Ave, Warren RP | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| ASDA, Kimberley Way | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Extra, Kingsnorth | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.7% | 0.0% | 0.3% |
| Tesco Extra, Hythe Road, Crooksfoot | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| All Comparison Goods: | 0.9% | 1.1% | 1.0% | 2.5% | 10.2% | 2.9% | 0.0% | 0.0% | 0.0% | 1.7% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 0.7% | 2.6% | 2.8% | 2.5% | 1.4% | 0.0% | 0.8% | 0.7% | 4.9% | 1.5% |
| CANTERBURY TOWN CENTRE: | 12.1% | 10.3% | 23.1% | 14.6% | 15.2% | 0.8% | 11.4% | 24.6% | 43.7% | 18.2% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.7% | 0.1% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.8% | 1.9% | 1.0% | 1.8% | 0.0% | 0.0% | 13.6% | 35.4% | 0.0% | 12.3% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 1.3% | 0.0% | 0.5% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 24.1% | 0.6% | 0.0% | 0.0% | 1.9% |
| HYTHE: | 0.0% | 0.0% | 0.8% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| LONDON: | 1.6% | 0.0% | 0.9% | 1.9% | 4.6% | 2.7% | 0.0% | 3.0% | 0.7% | 1.9% |
| MAIDSTONE TOWN CENTRE: | 0.8% | 4.5% | 2.7% | 0.9% | 14.2% | 0.0% | 2.2% | 0.0% | 24.8% | 4.0% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 0.0% | 0.0% | 0.0% | 0.1% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.8% | 2.1% | 20.1% | 0.0% | 0.0% | 0.7% | 1.7% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 15.7% | 11.5% | 13.0% | 9.9% | 12.2% | 13.6% | 11.2% | 12.6% | 10.8% | 12.5% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.7% | 0.0% | 3.6% | 1.4% | 5.1% | 2.8% | 0.7% | 2.4% | 1.4% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 16.0% | 19.3% | 32.2% | 23.6% | 40.1% | 49.8% | 29.2% | 65.0% | 77.1% | 42.5% |

**TABLE 3: RECORDING MEDIA - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 29.3% | 22.5% | 23.1% | 17.4% | 16.8% | 9.8% | 11.2% | 0.0% | 4.8% | 12.8% |
| **ASHFORD EDGE-OF-CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 0.0% | 0.7% | 0.0% | 1.1% | 2.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.0% | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Sainsbury's, Simone Weil Ave, Warren RP | 7.1% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 1.1% |
| ASDA, Kimberley Way | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 3.0% | 0.0% | 0.0% | 0.5% |
| Tesco Extra, Kingsnorth | 0.9% | 10.2% | 0.0% | 3.5% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 1.7% |
| Tesco Extra, Hythe Road, Crooksfoot | 5.2% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 1.3% | 0.0% | 0.0% | 1.1% | 8.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 1.6% | 1.7% | 1.1% | 0.0% | 0.0% | 1.9% | 0.0% | 0.0% | 0.6% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 1.1% | 0.3% |
| CANTERBURY TOWN CENTRE: | 2.0% | 1.7% | 6.5% | 2.9% | 3.4% | 1.1% | 2.2% | 3.9% | 19.9% | 4.1% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.2% | 24.5% | 0.0% | 7.8% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 1.6% | 0.0% | 0.7% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 21.7% | 0.0% | 0.0% | 0.0% | 1.8% |
| HYTHE: | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 3.5% | 5.9% | 0.0% | 2.2% |
| LONDON: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 1.6% | 0.0% | 3.8% | 0.0% | 1.0% | 0.0% | 10.3% | 1.2% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.1% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 2.4% | 7.8% | 0.0% | 0.0% | 0.0% | 0.8% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 53.4% | 59.7% | 65.8% | 70.3% | 60.8% | 56.1% | 62.0% | 63.2% | 60.7% | 61.3% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 1.6% | 9.0% | 0.0% | 0.0% | 1.0% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / ST SUB TOTAL: | 2.0% | 2.6% | 9.4% | 2.9% | 10.9% | 31.4% | 12.9% | 36.8% | 31.3% | 18.9% |

**TABLE 4: AUDIO VISUAL- 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 25.4% | 38.9% | 30.5% | 23.0% | 18.0% | 9.2% | 16.5% | 5.8% | 15.8% | 18.6% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.8% | 1.4% | 1.0% | 1.9% | 0.8% | 0.0% | 1.5% | 0.7% | 0.0% | 0.9% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 19.6% | 0.6% | 4.0% | 16.1% | 2.9% | 3.9% | 10.0% | 2.3% | 5.4% | 6.3% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 7.5% | 0.9% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.6% |
| Gallager Retail Park, Norman Road | 7.4% | 21.4% | 5.9% | 15.0% | 9.3% | 3.2% | 21.5% | 2.5% | 3.8% | 9.5% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 2.8% | 7.9% | 6.9% | 10.7% | 1.1% | 1.6% | 3.1% | 0.7% | 1.8% | 3.4% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 3.6% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% |
| Sainsbury's, Simone Weil Ave, Warren RP | 1.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| ASDA, Kimberley Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Extra, Kingsnorth | 1.0% | 0.0% | 0.0% | 3.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Tesco Extra, Hythe Road, Crooksfoot | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.5% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 1.2% | 0.0% | 2.2% | 8.3% | 17.5% | 1.4% | 0.7% | 0.0% | 0.0% | 2.3% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.0% | 0.0% | 1.0% | 0.9% | 0.0% | 0.0% | 1.5% | 4.1% | 1.7% | 1.6% |
| CANTERBURY TOWN CENTRE: | 0.0% | 0.6% | 2.4% | 0.0% | 0.8% | 0.0% | 0.7% | 1.6% | 26.3% | 2.4% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 2.6% | 0.4% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.1% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.8% | 0.5% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 8.3% | 34.8% | 0.0% | 11.1% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 9.6% | 0.0% | 2.9% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 18.9% | 0.0% | 0.0% | 0.0% | 1.4% |
| HYTHE: | 0.0% | 0.8% | 2.4% | 3.1% | 0.0% | 0.0% | 0.8% | 3.2% | 0.0% | 1.5% |
| LONDON: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 1.0% | 0.1% |
| MAIDSTONE TOWN CENTRE: | 2.7% | 2.2% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 17.2% | 1.8% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 3.0% | 13.0% | 0.0% | 0.0% | 0.0% | 1.1% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 32.7% | 19.8% | 33.2% | 17.2% | 40.5% | 35.7% | 32.9% | 33.0% | 11.8% | 29.7% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.0% | 0.0% | 0.0% | 2.6% | 10.8% | 2.0% | 0.0% | 3.7% | 1.4% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 2.7% | 3.6% | 7.8% | 4.0% | 7.3% | 33.3% | 11.3% | 54.1% | 57.7% | 24.9% |

**TABLE 5: DOMESTIC ELECTRICAL APPLIANCES - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 17.4% | 38.5% | 32.9% | 27.7% | 13.5% | 6.2% | 21.2% | 0.7% | 10.8% | 15.6% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD DESIGNER OUTLET:** | 0.4% | 1.3% | 1.2% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 5.9% | 1.3% | 3.0% | 12.6% | 6.4% | 3.7% | 5.9% | 2.7% | 1.6% | 4.2% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 1.0% | 3.8% | 2.8% | 1.7% | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% |
| Gallager Retail Park, Norman Road | 8.7% | 17.0% | 14.1% | 16.4% | 8.7% | 3.7% | 18.0% | 0.7% | 2.4% | 8.3% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 2.7% | 5.2% | 7.7% | 7.9% | 1.8% | 1.4% | 1.4% | 0.0% | 4.5% | 2.8% |
| Matalan, Brookefield Road | 0.1% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.8% | 4.5% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.8% |
| Sainsbury's, Simone Weil Ave, Warren RP | 0.1% | 0.0% | 0.8% | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| ASDA, Kimberley Way | 0.2% | 0.8% | 0.0% | 0.7% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.2% |
| Tesco Extra, Kingsnorth | 1.5% | 4.5% | 0.0% | 2.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% |
| Tesco Extra, Hythe Road, Crooksfoot | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 2.5% | 0.0% | 0.0% | 7.7% | 22.3% | 0.8% | 0.0% | 0.0% | 0.0% | 3.2% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.6% | 1.3% | 1.0% | 3.2% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.4% | 0.0% | 1.0% | 0.0% | 0.8% | 0.6% | 0.0% | 0.6% | 0.7% | 0.5% |
| CANTERBURY TOWN CENTRE: | 1.8% | 0.0% | 0.8% | 0.0% | 0.7% | 0.0% | 0.0% | 0.7% | 24.0% | 2.0% |
| CANTERBURY OUT OF CENTRE: | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.4% | 0.2% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.2% | 0.5% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 14.9% | 0.0% | 3.3% | 0.7% | 0.0% | 0.0% | 12.2% | 44.4% | 0.0% | 16.3% |
| FOLKESTON OUT OF CENTRE: | 5.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 17.8% | 0.0% | 5.9% |
| HASTINGS/ ST LEONARDS: | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 22.2% | 0.0% | 0.0% | 0.0% | 1.8% |
| HYTHE: | 0.6% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 1.2% | 1.4% | 0.0% | 0.6% |
| LONDON: | 0.1% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| MAIDSTONE TOWN CENTRE: | 1.1% | 1.1% | 1.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 14.9% | 1.3% |
| MAIDSTONE OUT OF CENTRE: | 0.1% | 0.0% | 0.0% | 0.0% | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| TUNBRIDGE WELLS TOWN CENTRE: | 1.0% | 0.0% | 0.0% | 0.0% | 1.5% | 12.2% | 0.0% | 0.0% | 0.0% | 1.1% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 27.3% | 20.8% | 27.0% | 15.5% | 33.6% | 32.5% | 31.3% | 30.9% | 26.3% | 28.1% |
| **ALL OTHER SHOPS & STORES:** | 3.0% | 0.0% | 2.8% | 1.0% | 3.2% | 14.1% | 7.4% | 0.0% | 4.0% | 2.8% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / ST SUB TOTAL: | 27.5% | 1.1% | 6.8% | 0.7% | 6.2% | 35.1% | 13.4% | 64.8% | 50.3% | 27.5% |

**TABLE 6: BOOKS AND STATIONARY - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 56.5% | 49.7% | 45.8% | 40.6% | 16.9% | 5.2% | 15.2% | 0.8% | 11.0% | 22.9% |
| **ASHFORD EDGE-OF-CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD DESIGNER OUTLET:** | 1.6% | 1.4% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.6% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 0.0% | 1.5% | 2.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.4% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.8% | 0.0% | 0.0% | 1.7% | 0.3% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.7% | 0.8% | 3.5% | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| Sainsbury's, Simone Weil Ave, Warren RP | 3.3% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% |
| ASDA, Kimberley Way | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.8% | 1.6% | 0.0% | 0.0% | 0.2% |
| Tesco Extra, Kingsnorth | 1.6% | 7.5% | 0.0% | 1.5% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% |
| Tesco Extra, Hythe Road, Crooksfoot | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.3% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.0% | 0.6% | 1.8% | 9.8% | 42.1% | 9.6% | 0.0% | 0.0% | 0.0% | 6.0% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 1.4% | 1.6% | 0.8% | 0.0% | 0.0% | 0.9% | 0.0% | 3.4% | 0.6% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CANTERBURY TOWN CENTRE: | 0.9% | 5.8% | 2.9% | 0.8% | 0.0% | 0.8% | 0.7% | 7.1% | 24.6% | 4.9% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.6% | 0.2% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 2.6% | 0.8% | 0.0% | 0.0% | 12.1% | 50.6% | 0.0% | 16.3% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.3% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 19.8% | 0.0% | 0.0% | 0.0% | 1.5% |
| HYTHE: | 0.0% | 0.0% | 3.6% | 1.0% | 0.0% | 0.0% | 5.8% | 10.6% | 0.0% | 4.0% |
| LONDON: | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.9% | 0.3% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 0.8% | 0.0% | 3.7% | 0.0% | 0.0% | 0.0% | 14.6% | 1.4% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 6.7% | 0.0% | 0.0% | 0.0% | 0.6% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 5.8% | 0.0% | 0.0% | 0.0% | 0.5% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 31.1% | 29.6% | 31.1% | 37.2% | 31.9% | 46.6% | 56.1% | 28.7% | 37.4% | 34.4% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.0% | 4.2% | 0.0% | 1.8% | 2.7% | 7.7% | 0.8% | 2.2% | 1.8% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 2.6% | 6.5% | 9.9% | 2.6% | 5.3% | 34.3% | 18.6% | 69.1% | 42.7% | 29.9% |

**TABLE 7: GAMES, TOYS, HOBBIES, PETS, ETC - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 50.0% | 53.2% | 45.1% | 48.1% | 33.4% | 9.7% | 14.6% | 3.0% | 11.0% | 26.4% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 5.2% | 0.9% | 1.3% | 0.0% | 0.9% | 0.8% | 0.0% | 2.5% | 0.8% | 1.8% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 4.7% | 1.6% | 0.0% | 3.4% | 0.9% | 0.0% | 5.9% | 0.6% | 1.1% | 1.8% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.8% | 0.2% |
| Dobbies Garden World | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.1% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Gallager Retail Park, Norman Road | 2.4% | 9.8% | 8.7% | 12.6% | 4.7% | 0.0% | 6.6% | 0.0% | 4.1% | 4.3% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.6% | 0.0% | 0.3% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Sainsbury's, Simone Weil Ave, Warren RP | 3.3% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% |
| ASDA, Kimberley Way | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 2.0% | 1.8% | 0.0% | 0.0% | 0.4% |
| Tesco Extra, Kingsnorth | 0.9% | 6.3% | 0.0% | 1.0% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% |
| Tesco Extra, Hythe Road, Crooksfoot | 2.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.0% | 0.0% | 1.3% | 2.4% | 19.4% | 1.8% | 0.0% | 0.0% | 0.0% | 2.2% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 0.9% | 1.3% | 0.0% | 3.4% | 0.0% | 1.7% | 0.0% | 1.1% | 0.8% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 1.1% | 0.5% |
| CANTERBURY TOWN CENTRE: | 0.0% | 3.3% | 3.5% | 2.0% | 2.3% | 0.0% | 0.8% | 8.5% | 28.6% | 5.4% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.9% | 0.1% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 2.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.1% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 9.0% | 0.5% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 3.3% | 1.0% | 0.0% | 0.0% | 14.7% | 48.4% | 0.0% | 15.8% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 0.0% | 0.7% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 21.5% | 0.0% | 0.0% | 0.0% | 1.6% |
| HYTHE: | 0.0% | 0.0% | 0.0% | 2.7% | 0.0% | 0.0% | 2.7% | 4.0% | 0.0% | 1.6% |
| LONDON: | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.1% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 1.0% | 0.0% | 0.9% | 0.0% | 1.8% | 0.8% | 20.7% | 1.8% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.3% | 0.0% | 0.0% | 0.0% | 0.5% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 1.0% | 0.9% | 10.8% | 0.0% | 0.0% | 0.0% | 0.9% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 29.2% | 21.5% | 26.0% | 23.5% | 21.9% | 44.3% | 38.9% | 28.1% | 12.9% | 27.4% |
| **ALL OTHER SHOPS & STORES:** | 2.1% | 0.0% | 4.7% | 0.0% | 5.5% | 1.0% | 9.6% | 0.0% | 5.0% | 2.3% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 0.0% | 4.9% | 7.8% | 6.7% | 6.3% | 39.5% | 20.0% | 65.3% | 63.2% | 29.9% |

**TABLE 8: FURNITURE, CARPETS, FLOOR COVERINGS & SOFT FURNISHINGS - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 52.4% | 51.4% | 31.7% | 30.5% | 28.0% | 11.3% | 19.7% | 3.5% | 9.0% | 24.1% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 9.6% | 1.7% | 5.0% | 13.1% | 2.6% | 2.3% | 4.2% | 0.7% | 1.0% | 3.7% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 2.9% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.4% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 6.7% | 3.9% | 4.3% | 3.8% | 2.3% | 1.8% | 0.7% | 0.0% | 2.4% |
| Gallager Retail Park, Norman Road | 5.3% | 2.7% | 1.3% | 3.7% | 2.3% | 3.2% | 1.5% | 0.0% | 0.8% | 2.0% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| John Lewis at Home, Fougeres Way | 3.3% | 5.0% | 1.3% | 4.0% | 4.5% | 0.0% | 3.5% | 1.6% | 2.1% | 2.7% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.1% |
| Warren Retail Park, Ashford | 0.0% | 1.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| Sainsbury's, Simone Weil Ave, Warren RP | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASDA, Kimberley Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Kingsnorth | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Hythe Road, Crooksfoot | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.0% | 0.0% | 0.0% | 2.8% | 7.7% | 0.9% | 0.0% | 0.0% | 0.0% | 1.0% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 4.6% | 2.6% | 5.1% | 0.0% | 4.5% | 0.0% | 3.7% | 0.0% | 2.2% | 2.2% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 2.2% | 0.9% | 2.4% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 1.7% | 0.8% |
| CANTERBURY TOWN CENTRE: | 6.5% | 3.2% | 19.6% | 18.6% | 2.1% | 0.9% | 8.1% | 14.3% | 51.6% | 12.3% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 2.1% | 0.3% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 0.1% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.7% | 0.3% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 4.5% | 1.2% | 0.0% | 0.0% | 9.0% | 40.8% | 0.0% | 12.8% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 6.2% | 0.0% | 1.8% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 18.6% | 0.0% | 0.0% | 0.0% | 1.5% |
| HYTHE: | 0.0% | 0.0% | 0.0% | 1.7% | 1.4% | 0.0% | 1.5% | 8.2% | 0.0% | 2.7% |
| LONDON: | 1.3% | 0.0% | 0.0% | 1.5% | 0.0% | 1.2% | 0.8% | 0.0% | 0.0% | 0.4% |
| MAIDSTONE TOWN CENTRE: | 0.9% | 8.7% | 4.0% | 0.0% | 16.4% | 0.0% | 3.5% | 2.6% | 13.3% | 5.0% |
| MAIDSTONE OUT OF CENTRE: | 1.2% | 4.5% | 2.4% | 1.2% | 0.0% | 0.0% | 1.9% | 5.2% | 0.0% | 2.6% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.1% | 0.0% | 0.0% | 0.0% | 0.6% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 1.2% | 0.0% | 23.3% | 1.8% | 0.0% | 0.0% | 2.0% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| **SFT/INTERNET** | 8.0% | 5.9% | 12.3% | 5.7% | 22.4% | 12.1% | 7.9% | 12.7% | 5.8% | 11.0% |
| **ALL OTHER SHOPS & STORES:** | 4.6% | 3.5% | 6.4% | 6.2% | 2.4% | 13.9% | 25.9% | 2.6% | 5.5% | 6.4% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 12.1% | 17.2% | 33.0% | 25.5% | 20.9% | 53.9% | 28.3% | 78.0% | 73.4% | 43.5% |

**TABLE 9: DIY, GARDENING, ETC - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 11.7% | 15.3% | 25.9% | 8.1% | 12.1% | 3.1% | 3.9% | 0.0% | 3.7% | 8.0% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 6.0% | 0.0% | 0.0% | 0.0% | 7.0% | 0.0% | 1.0% | 0.0% | 0.0% | 1.5% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 1.1% | 3.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.4% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 80.7% | 84.0% | 62.9% | 76.5% | 54.4% | 28.0% | 65.4% | 3.7% | 26.8% | 45.5% |
| Gallager Retail Park, Norman Road | 0.7% | 0.0% | 0.0% | 0.0% | 0.9% | 1.5% | 4.1% | 0.0% | 1.4% | 0.8% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Sainsbury's, Simone Weil Ave, Warren RP | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASDA, Kimberley Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.1% |
| Tesco Extra, Kingsnorth | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Hythe Road, Crooksfoot | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.9% | 0.0% | 0.0% | 6.3% | 15.4% | 4.1% | 0.0% | 0.0% | 0.7% | 2.7% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 0.0% | 0.0% | 1.6% | 0.7% | 0.0% | 2.9% | 0.7% | 5.0% | 1.0% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CANTERBURY TOWN CENTRE: | 0.0% | 0.0% | 0.8% | 0.0% | 1.6% | 0.0% | 0.0% | 2.6% | 34.2% | 3.3% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 6.0% | 0.5% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.4% | 0.2% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 2.7% | 1.9% | 0.0% | 0.0% | 14.2% | 67.0% | 0.0% | 19.9% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 25.4% | 0.9% | 7.1% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 14.2% | 0.0% | 0.0% | 0.0% | 1.4% |
| HYTHE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.9% | 0.2% |
| LONDON: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 1.1% | 0.1% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 3.1% | 0.0% | 0.0% | 0.0% | 6.8% | 0.8% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 9.3% | 0.0% | 0.0% | 0.0% | 0.8% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 14.2% | 0.0% | 0.0% | 0.0% | 1.3% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 0.0% | 0.7% | 1.1% | 1.9% | 0.0% | 9.0% | 1.5% | 0.0% | 0.9% | 1.3% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.0% | 4.7% | 0.0% | 2.5% | 15.3% | 5.5% | 0.0% | 6.3% | 3.0% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 0.0% | 0.0% | 3.5% | 1.9% | 7.0% | 39.0% | 15.7% | 95.6% | 53.3% | 35.7% |

**TABLE 10: PERSONAL CARE - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 58.1% | 68.2% | 67.6% | 62.3% | 27.3% | 10.7% | 38.2% | 1.2% | 12.1% | 32.7% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.0% | 0.0% | 0.9% | 1.7% | 0.0% | 4.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 4.9% | 6.1% | 4.3% | 1.7% | 0.8% | 4.3% | 3.8% | 0.0% | 0.0% | 2.5% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.9% | 0.0% | 1.4% | 0.0% | 0.9% | 0.0% | 1.6% | 0.0% | 0.7% | 0.5% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.1% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Sainsbury's, Simone Weil Ave, Warren RP | 10.4% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 1.5% |
| ASDA, Kimberley Way | 0.7% | 0.7% | 0.0% | 0.7% | 0.0% | 0.8% | 2.2% | 0.0% | 0.9% | 0.5% |
| Tesco Extra, Kingsnorth | 5.4% | 5.3% | 0.0% | 5.7% | 0.0% | 0.0% | 0.8% | 0.0% | 0.8% | 1.8% |
| Tesco Extra, Hythe Road, Crooksfoot | 2.2% | 0.7% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.0% | 0.0% | 0.9% | 8.3% | 41.9% | 10.4% | 0.8% | 0.7% | 0.0% | 5.6% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.8% | 4.9% | 0.9% | 5.5% | 0.7% | 0.0% | 2.2% | 0.0% | 3.1% | 1.6% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.0% | 0.0% | 0.9% | 0.0% | 0.7% | 0.0% | 0.0% | 0.7% | 0.9% | 0.4% |
| CANTERBURY TOWN CENTRE: | 0.9% | 2.5% | 2.4% | 0.0% | 0.0% | 0.8% | 0.6% | 8.2% | 32.4% | 5.1% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.8% | 0.3% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.4% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 15.2% | 1.0% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.8% | 0.0% | 3.1% | 0.7% | 0.0% | 0.0% | 14.7% | 65.7% | 0.0% | 21.5% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 6.1% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 4.4% | 0.0% | 2.2% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 29.9% | 0.0% | 0.0% | 0.0% | 2.2% |
| HYTHE: | 0.0% | 0.0% | 4.4% | 1.0% | 0.0% | 0.0% | 8.5% | 13.1% | 0.0% | 5.1% |
| LONDON: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 0.7% | 0.0% | 9.6% | 0.0% | 0.0% | 0.0% | 23.1% | 2.3% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 18.6% | 0.0% | 0.0% | 0.0% | 1.2% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 9.6% | 0.0% | 0.0% | 0.0% | 0.7% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 14.9% | 4.1% | 9.7% | 7.4% | 10.3% | 7.1% | 15.5% | 4.9% | 2.2% | 8.0% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.0% | 1.9% | 0.0% | 3.3% | 3.8% | 9.9% | 0.0% | 0.9% | 1.6% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 1.7% | 8.5% | 12.4% | 2.5% | 13.3% | 59.0% | 24.4% | 93.2% | 77.1% | 42.6% |

**TABLE 11: MEDICAL GOODS - 2014 MARKET SHARE ANALYSIS (%)**

*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 72.1% | 71.4% | 61.8% | 67.8% | 15.0% | 2.3% | 18.4% | 0.0% | 8.9% | 28.6% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 0.0% | 3.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 6.9% | 3.5% | 0.8% | 1.0% | 0.8% | 0.8% | 0.7% | 0.0% | 0.0% | 1.4% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Sainsbury's, Simone Weil Ave, Warren RP | 4.8% | 0.0% | 0.0% | 1.9% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.7% |
| ASDA, Kimberley Way | 0.0% | 0.7% | 0.0% | 0.7% | 0.0% | 0.0% | 2.2% | 0.0% | 0.9% | 0.4% |
| Tesco Extra, Kingsnorth | 0.7% | 6.5% | 0.0% | 4.1% | 0.0% | 0.0% | 0.8% | 0.0% | 0.8% | 1.1% |
| Tesco Extra, Hythe Road, Crooksfoot | 3.2% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.9% | 0.0% | 0.0% | 12.1% | 61.6% | 6.6% | 0.7% | 0.7% | 0.0% | 7.8% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| **ASHFORD OTHER VILLAGES/STORES:** | 5.9% | 7.7% | 19.6% | 6.1% | 3.4% | 0.0% | 2.1% | 0.0% | 0.8% | 4.0% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| BLUEWATER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| CANTERBURY TOWN CENTRE: | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 10.7% | 33.7% | 5.1% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.7% | 0.3% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 18.0% | 1.1% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.8% | 0.0% | 2.6% | 0.7% | 0.0% | 0.0% | 7.6% | 56.9% | 0.0% | 18.0% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 5.4% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 8.4% | 0.0% | 3.1% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 21.0% | 0.0% | 0.0% | 0.0% | 1.7% |
| HYTHE: | 0.0% | 0.0% | 3.6% | 1.0% | 0.0% | 0.0% | 4.9% | 16.8% | 0.0% | 5.9% |
| LONDON: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.8% | 0.1% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 3.5% | 0.0% | 0.0% | 0.0% | 11.5% | 1.0% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 40.6% | 0.0% | 0.0% | 0.0% | 3.4% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 1.9% | 0.0% | 0.0% | 0.0% | 0.2% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 3.9% | 0.0% | 2.6% | 1.6% | 4.9% | 3.5% | 1.5% | 2.0% | 0.0% | 2.3% |
| **ALL OTHER SHOPS & STORES:** | 0.0% | 0.7% | 7.2% | 1.4% | 8.8% | 22.7% | 61.2% | 4.6% | 18.3% | 12.8% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 0.8% | 5.4% | 8.2% | 2.6% | 4.9% | 64.1% | 12.5% | 92.7% | 68.8% | 39.9% |

**TABLE 12: OTHER COMPARISON GOODS - 2014 MARKET SHARE ANALYSIS (%)**

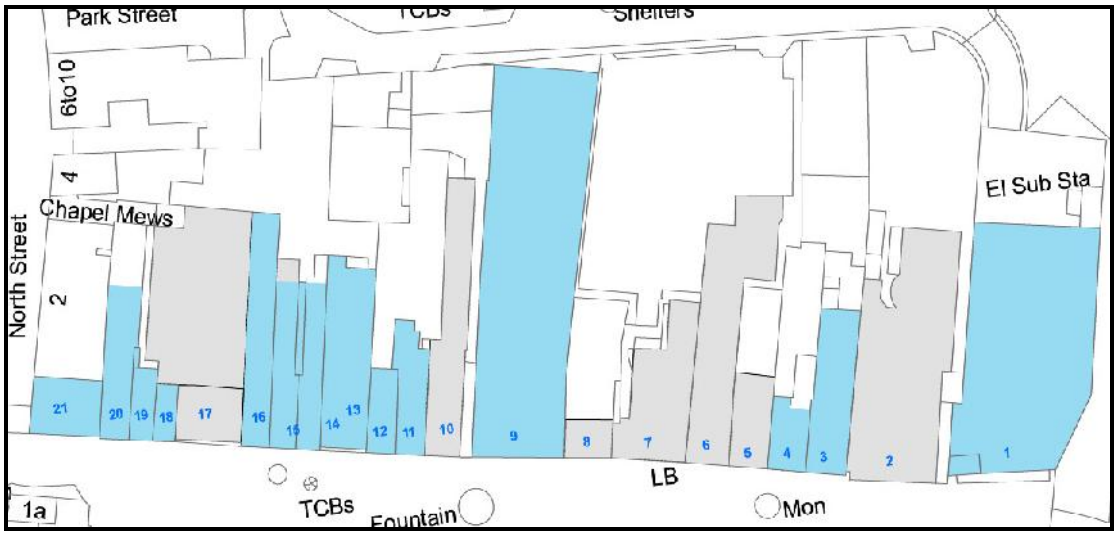
*Including Internet Shopping and other Special Forms of Trading*

| ZONES | 1A | 1B | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 52.6% | 57.1% | 56.4% | 40.7% | 26.4% | 5.2% | 42.7% | 0.0% | 9.9% | 27.7% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 8.1% | 4.4% | 7.1% | 17.5% | 6.1% | 20.4% | 10.3% | 1.9% | 2.4% | 6.9% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 1.2% | 0.8% | 1.6% | 1.5% | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.7% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Dobbies Garden World | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park, Norman Road | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 3.8% | 8.2% | 7.3% | 3.3% | 5.0% | 0.0% | 2.7% | 0.8% | 0.0% | 3.2% |
| Matalan, Brookefield Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Orbital Trade Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Sainsbury's, Simone Weil Ave, Warren RP | 2.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| ASDA, Kimberley Way | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Kingsnorth | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Extra, Hythe Road, Crooksfoot | 1.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.0% | 0.8% | 0.0% | 4.7% | 25.9% | 1.9% | 1.0% | 0.0% | 0.0% | 3.3% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.8% | 0.5% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 2.3% | 1.0% | 4.8% | 2.6% | 1.0% | 0.0% | 1.0% | 2.0% | 7.7% | 2.3% |
| CANTERBURY TOWN CENTRE: | 7.5% | 1.8% | 11.3% | 8.6% | 2.3% | 0.0% | 1.9% | 9.3% | 41.4% | 8.5% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% | 0.3% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 13.4% | 61.5% | 0.0% | 18.8% |
| FOLKESTON OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.3% |
| HASTINGS/ ST LEONARDS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 32.8% | 0.0% | 0.0% | 0.0% | 2.5% |
| HYTHE: | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.0% | 4.9% | 5.4% | 0.0% | 2.0% |
| LONDON: | 2.3% | 1.7% | 2.7% | 2.7% | 7.6% | 2.2% | 0.0% | 2.9% | 0.0% | 2.7% |
| MAIDSTONE TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 12.8% | 0.0% | 0.0% | 0.0% | 24.6% | 2.9% |
| MAIDSTONE OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.8% | 0.0% | 0.0% | 0.0% | 0.7% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 3.3% | 15.1% | 0.0% | 0.0% | 0.0% | 1.5% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **SFT/INTERNET** | 17.2% | 21.4% | 8.8% | 12.8% | 8.6% | 9.3% | 16.8% | 15.2% | 2.3% | 13.6% |
| **ALL OTHER SHOPS & STORES:** | 1.2% | 0.0% | 0.0% | 2.2% | 1.0% | 4.3% | 2.6% | 0.0% | 2.4% | 1.1% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 12.1% | 4.5% | 18.8% | 15.0% | 26.9% | 59.0% | 21.2% | 82.1% | 78.3% | 42.3% |

# APPENDIX 6: ASHFORD AND TENTERDENT TOWN CENTRES - PRIMARY FRONTAGE AUDIT

**ASHFORD TOWN CENTRE VACANCY RATE MONITORING NOVEMBER 2014**

**Frontage 1**
High Street from Wellesley Road to North Street

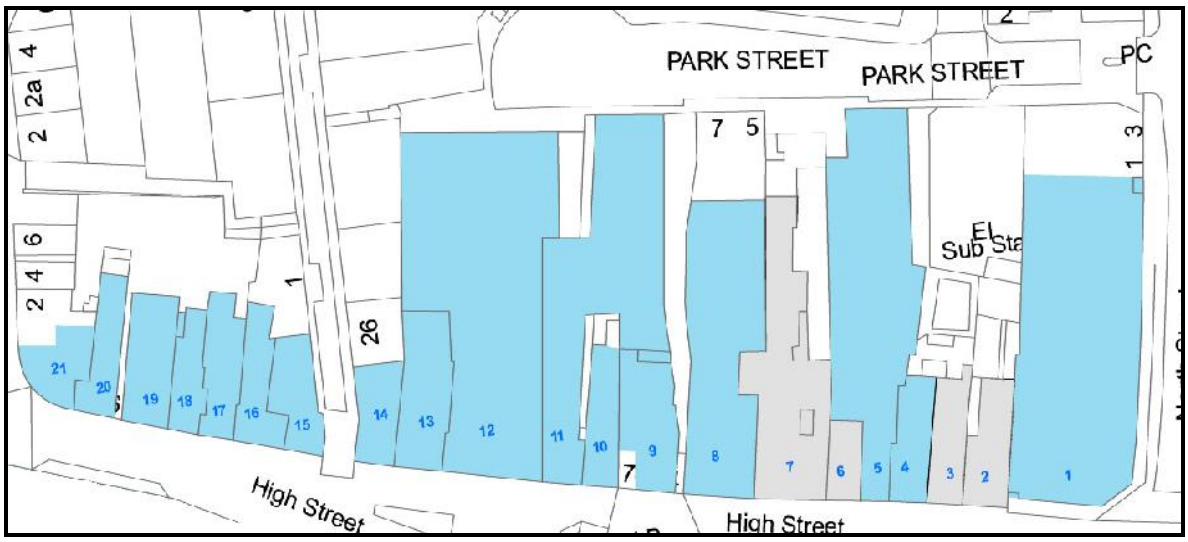



| Current Occupiers | | | Independent? (<5 branches) |
|---|---|---|---|
| **1** | VACANT | A1 | |
| **2** | County Hotel | A4 | |
| **3** | Indian Diner | A3 | I |
| **4** | Cancer Research | A1 | |
| **5** | Imperial China | A3 | I |
| **6** | Natwest | A2 | |
| **7** | Natwest | A2 | |
| **8** | Reeves & Co | A2 | I |
| **9** | SportsDirect.com | A1 | |
| **10** | Cashino Gaming | A2 | |
| **11** | VACANT | A1 | |
| **12** | VACANT | A1 | |
| **13** | **VACANT** | A1 | |
| **14** | Soundcraft Hifi | A1 | I |
| **15** | Sweeney's of Ashford Barber Shop | A1 | I |
| **16** | Celly's Hairstyle International | A1 | I |
| **17** | McDonalds | A3 | |
| **18** | The Chocolate Box | A1 | I |
| **19** | Linda's Florist | A1 | I |
| **20** | Mr Simms Olde Sweet Shoppe | A1 | I |
| **21** | Evans | A1 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **3** | **2** | **2** | **2** | **3** | **2** | **0** | **1** | **0** | **2** | **3** | **4** | | | | |
| **% units vacant** | **14%** | **10%** | **10%** | **10%** | **14%** | **10%** | **0%** | **5%** | **0%** | **10%** | **14%** | **19%** | | | | |
| **Independent units** | | | | | | | | | **12** | **10** | **9** | **9** | | | | |

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**Frontage 2**
High Street from North Street to New Rents




| | | | |
|---|---|---|---|
| **1** | Boots | A1 | |
| **2** | Vision Express | D1 | |
| **3** | Santander | A2 | |
| **4** | Ladbrokes | A1 | |
| **5** | Iceland | A1 | |
| **6** | Barclays | A2 | |
| **7** | The George Hotel | A4 | I |
| **8** | WH Smith | A1 | |
| **9** | Burton | A1 | |
| **10** | Shoe Zone | A1 | |
| **11** | Tesco Express | A1 | |
| **12** | 99p Stores | A1 | |
| **13** | CEX Entertainment Exchange | A1 | |
| **14** | **VACANT** | A1 | |
| **15** | Greggs | A1 | |
| **16** | O2 Shop | A1 | |
| **17** | Photo Digital Specialists/Snappy Snaps | A1 | |
| **18** | Oxfam | A1 | |
| **19** | EE Mobile | A1 | |
| **20** | Toni and Guy | A1 | |
| **21** | **VACANT** | A1 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **1** | **1** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **2** | | | | |
| **% units vacant** | **10%** | **5%** | **5%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **10%** | | | | |
| **Independent units** | | | | | | | | | **1** | **1** | **1** | **1** | | | | |

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**Frontage 3**
High Street from Drum Lane to Bank Street




| | | | |
|---|---|---|---|
| **1** | Argos | A1 | |
| **2** | British Heart Foundation | A1 | |
| **3** | BetFred | A2 | |
| **4** | Pet Essentials | A1 | |
| **5** | PDSA Pets | A1 | |
| **6** | Game | A1 | |
| **7** | Marks and Spencer | A1 | |
| **8** | Clinton Cards | A1 | |
| **9** | **Pinky** | A1 | I |
| **10** | Starbucks | A3 | |
| **11** | Savia Gifts | A1 | I |
| **12** | Holland & Barratt | A1 | |
| **13** | Pickwick Pawnbrokers | D1 | |
| **14** | Thomson Travel Agents | A1 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **1** | **1** | **0** | | | | |
| **% units vacant** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **7%** | **7%** | **0%** | | | | |
| **Independent units** | | | | | | | | | **1** | **1** | **1** | **2** | | | | |

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**Frontage 4**
Bank Street from High Street to County Square Entrance




| | | | |
|---|---|---|---|
| **1** | Post Office | A1 | |
| **2** | **Trend Hairdressing** | A1 | I |
| **3** | Greens Shoe Repair | A1 | I |
| **4** | VACANT | A2 | |
| **5** | Skunkworks | A1 | |
| **6** | Western Chicken | A3 | I |
| **7** | Dyson Brown | A1 | I |
| **8** | VACANT | A2 | |
| **9** | Barrys Kitchen | A3 | I |
| **10** | Bombay Street | A1 | I |
| **11** | Buzz Hair Design | A1 | I |
| **12** | **Duet Group** | A2 | |
| **13** | KLAN | A1 | I |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **4** | **4** | **5** | **5** | **5** | **6** | **6** | **5** | **3** | **4** | **2** | | | | |
| **% units vacant** | **15%** | **31%** | **31%** | **38%** | **38%** | **38%** | **46%** | **46%** | **38%** | **23%** | **31%** | **15%** | | | | |
| **Independent units** | | | | | | | | | **5** | **7** | **7** | **8** | | | | |

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**Frontage 5**
Bank Street from Middle Street to County Square Entrance

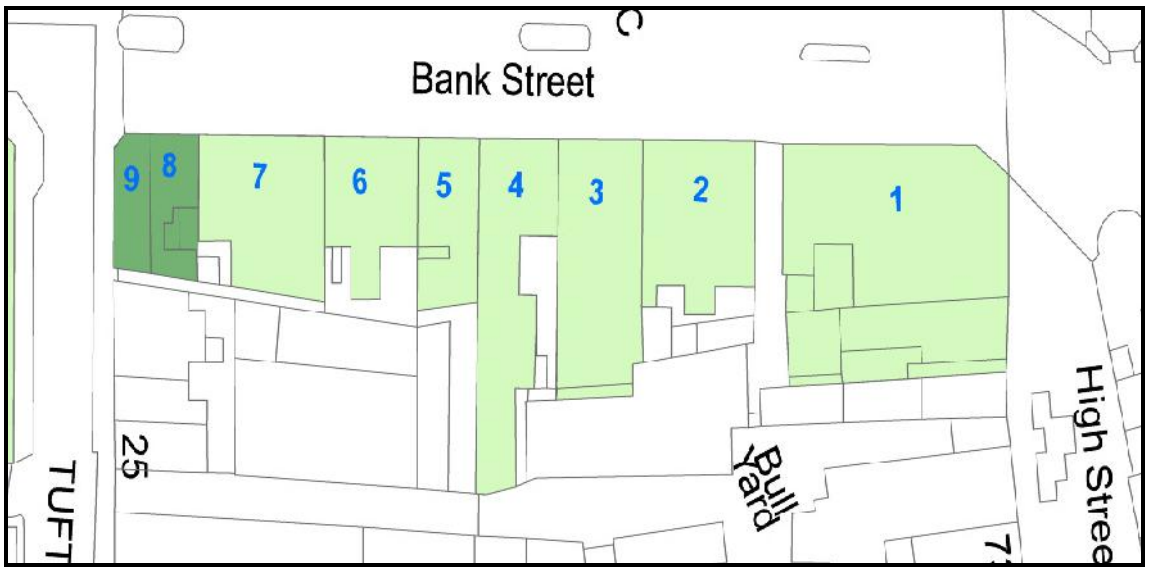



| | | | |
|---|---|---|---|
| **1** | Wimpy | A3 | |
| **2** | Lesleys Florist | A1 | I |
| **3** | **I-Zone** | A2 | |
| **4** | Ashford Cafe | A3 | I |
| **5** | Cross's | A1 | I |
| **6** | Kamsons Pharmacy | A1 | I |
| **7** | Zone One Off Licence | A1 | I |
| **8** | VACANT | A2 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **0** | **1** | **1** | **1** | | | | |
| **% units vacant** | **13%** | **13%** | **13%** | **13%** | **13%** | **13%** | **13%** | **13%** | **0%** | **13%** | **13%** | **13%** | | | | |
| **Independent units** | | | | | | | | | **6** | **6** | **6** | **5** | | | | |

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**Frontage 6**
Bank Street from High Street to Tufton Street

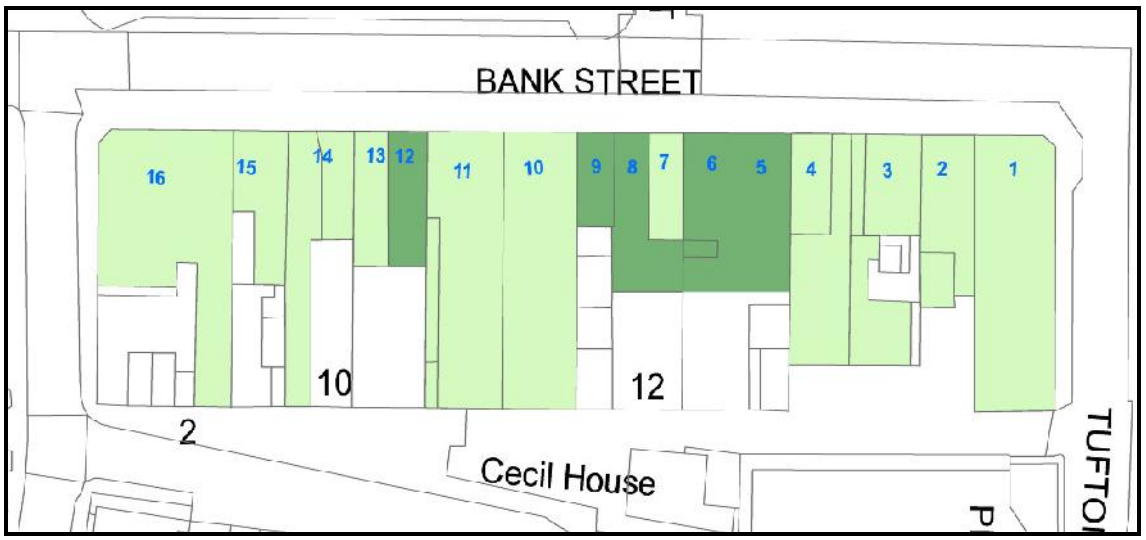



| | | | |
|---|---|---|---|
| **1** | Lloyds TSB | A2 | |
| **2** | Emporia Fabric & Crafts | A2 | I |
| **3** | **Emporia Fabric & Crafts** | A2 | I |
| **4** | Bet Fred Betting Shop | A2 | |
| **4b** | Holden + Co Solicitors | A2 | I |
| **5** | Kingsford Solicitors | A2 | I |
| **6** | Kingsford Solicitors | A2 | I |
| **7** | Hallett & Co | A2 | I |
| **8** | Hallett & Co | A1 | I |
| **9** | Weatherman | A1 | I |
| **10** | Weatherman | A1 | I |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **1** | **0** | | | | |
| **% units vacant** | **11%** | **11%** | **11%** | **11%** | **11%** | **11%** | **11%** | **10%** | **10%** | **10%** | **10%** | **0%** | | | | |
| **Independent units** | | | | | | | | | **7** | **8** | **8** | **9** | | | | |

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**Frontage 7**
Bank Street from Tufton Street to Queen Street

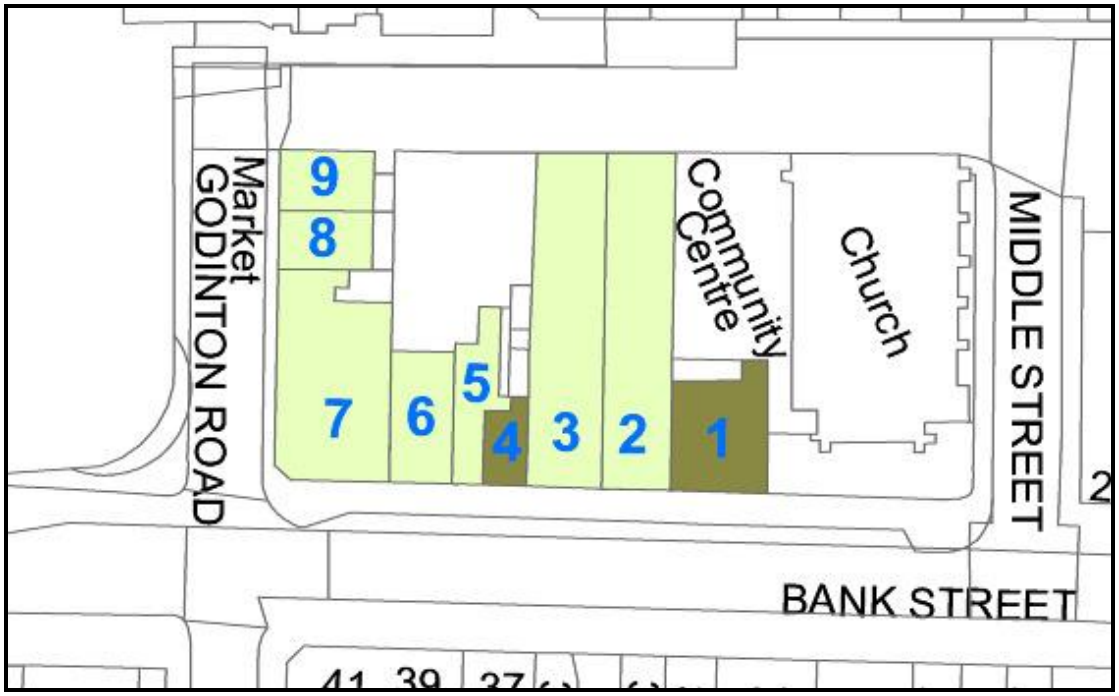



| | | | |
|---|---|---|---|
| **1** | TSB | A2 | |
| **2** | Subway | A3 | |
| **3** | Cooperative Bank | A2 | |
| **4** | William Hill | A2 | |
| **5** | The Ballroom | A1 | I |
| **6** | The Old English Barbers | A1 | I |
| **7** | Dr Sun and Herbs | D1 | I |
| **8** | Brooks Hairdressing | A1 | I |
| **9** | Lucky Star | A1 | I |
| **10** | VACANT | A2 | |
| **11** | **Asiana restaurant** | A3 | I |
| **12** | Papa G Afro Barbers | A1 | I |
| **13** | Himalayan Gurkha Mini Market | D1 | I |
| **14** | VACANT | A2 | |
| **15** | Kemp Carr Brown & Co Accountants | A2 | I |
| **16** | Hortons | A3 | I |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **2** | **1** | **1** | **2** | **2** | **1** | **1** | **1** | **2** | **2** | **2** | | | | |
| **% units vacant** | **13%** | **13%** | **6%** | **6%** | **13%** | **13%** | **6%** | **6%** | **6%** | **12%** | **12%** | **12%** | | | | |
| **Independent units** | | | | | | | | | **10** | **10** | **10** | **10** | | | | |

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**Frontage 8**
Bank Street from Middle Street to Godinton Road

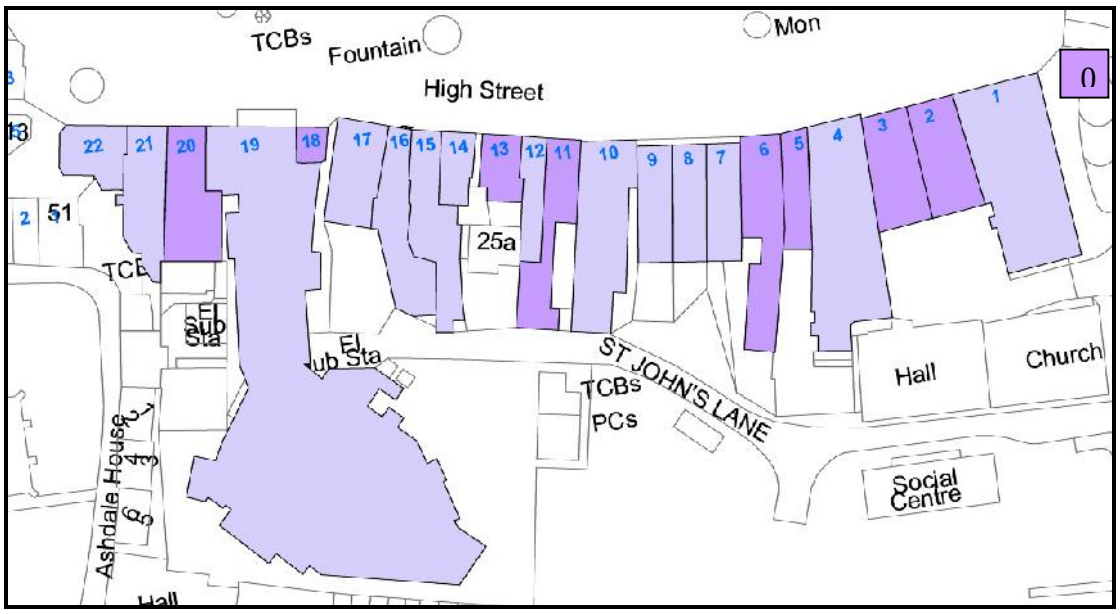



| | | | |
|---|---|---|---|
| **1** | VACANT | A1 | |
| **2** | **VACANT** | A3 | |
| **3** | Tratorria Romana | A3 | I |
| **4** | Beautiful Nails | A1 | I |
| **5** | Nasrin | A5 | I |
| **6** | Just Pizza | A5 | I |
| **7** | VACANT | SG | |
| **8** | Kent Take Away | A5 | I |
| **9** | Happily Ever After | A3 | I |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **1** | **1** | **1** | **2** | **2** | **3** | **1** | **1** | **3** | **3** | **2** | **3** | | | | |
| **% units vacant** | **11%** | **11%** | **11%** | **22%** | **22%** | **33%** | **11%** | **11%** | **33%** | **33%** | **22%** | **33%** | | | | |
| **Independent units** | | | | | | | | | **6** | **6** | **7** | **6** | | | | |

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**Frontage 9**
High Street from Wellesley Road to Middle Row

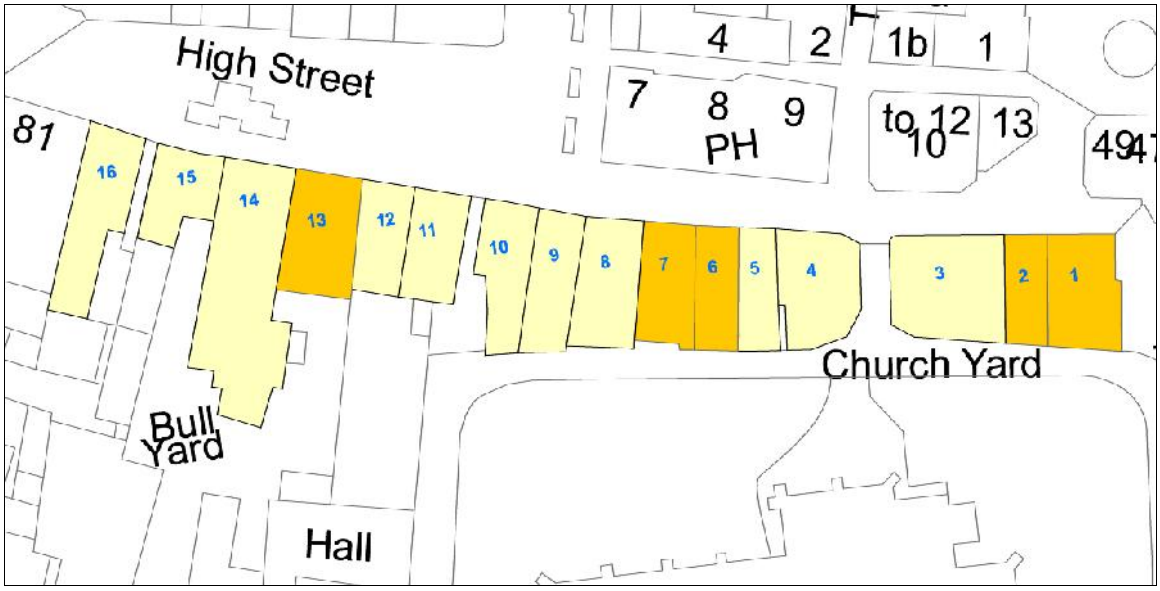



| | | | |
|---|---|---|---|
| 0 | Skin Lumina | A1 | I |
| 1 | VACANT | A3 | |
| 2 | Variety Cash and Carry | A1 | I |
| 3 | Nail Forever | A1 | I |
| 4 | KFC | A5 | |
| 5 | Namuna Café & Restaurant | A1 | I |
| 6 | VACANT | A1 | |
| 7 | The Cod Father | A5 | |
| 8 | Charisma | A2 | I |
| 9 | Reed | A2 | |
| 10 | The Gorge | A3 | I |
| 11 | Antoniou Hair and Beauty | A1 | I |
| 12 | The Fountain Grill | A5 | I |
| 13 | CMDL Dance and School Wear | A1 | I |
| 14 | VACANT | A2 | |
| 15 | Café Express | A3 | I |
| 16 | Bobinski Tattoo Studio | A2 | I |
| 17 | Hollywood Nails | A2 | I |
| 18 | **Ghurkha Jewellers** | A1 | I |
| 19 | Mecca Bingo | D2 | |
| 20 | Gold Rush | A1 | I |
| 21 | HSBC | A2 | |
| 22 | Mann Countrywide | A2 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **2** | **2** | **2** | **3** | **3** | **2** | **1** | **1** | **2** | **4** | **3** | | | | |
| **% units vacant** | **9%** | **9%** | **9%** | **9%** | **14%** | **14%** | **9%** | **5%** | **5%** | **9%** | **17%** | **13%** | | | | |
| **Independent units** | | | | | | | | | **15** | **15** | **13** | **14** | | | | |

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**Frontage 10**
High Street from Bank Street to Middle Row




| | | | |
|---|---|---|---|
| 1 | Xanadu | A1 | I |
| 2 | **Martin + Co** | A1 | |
| 3 | Your Move | A2 | |
| 4 | VACANT | A2 | |
| 5 | VACANT | A1 | |
| 6 | VACANT | A1 | |
| 7 | The Chilli Bite | A3 | I |
| 8 | Nursing & Care Agency | A2 | |
| 9 | First Class Mortgage Solutions | A2 | |
| 10 | Martins | A2 | |
| 11 | VACANT | A2 | |
| 12 | Elegance Lingerie | A1 | I |
| 13 | **VACANT** | A2 | |
| 14 | Nationwide | A2 | |
| 15 | Connells | A2 | |
| 16 | Lloyds | A2 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **1** | **2** | **4** | **6** | **6** | **4** | **4** | **4** | **3** | **5** | **5** | | | | |
| **% units vacant** | **12%** | **6%** | **12%** | **23%** | **35%** | **35%** | **25%** | **25%** | **25%** | **19%** | **31%** | **31%** | | | | |
| **Independent units** | | | | | | | | | **3** | **4** | **3** | **3** | | | | |

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**Frontage 11**
Middle Row

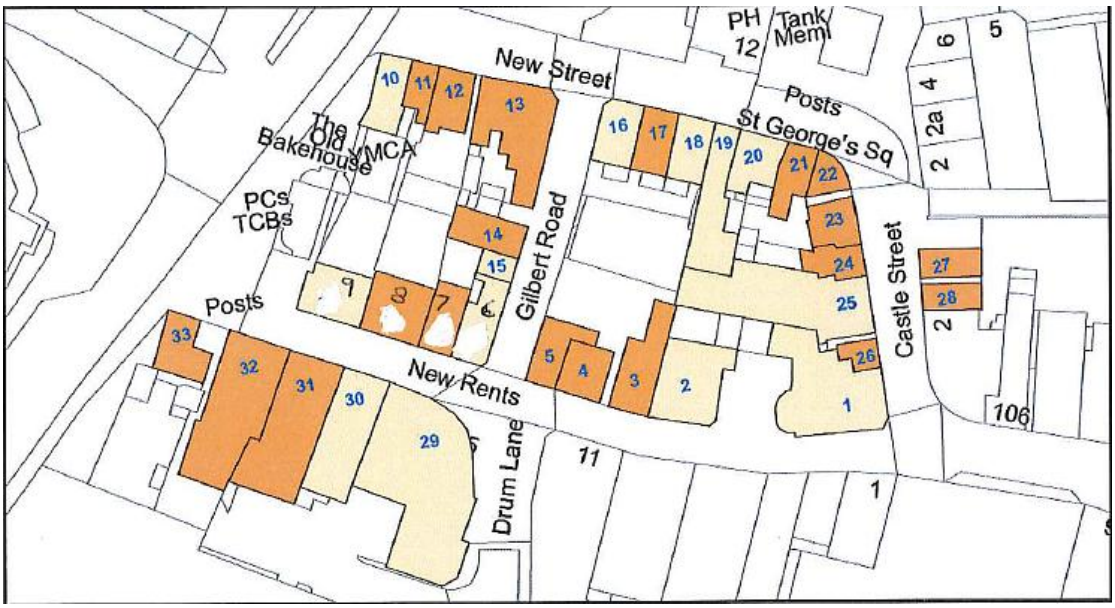



| | | | |
|---|---|---|---|
| 1 | Ernest Jones | A1 | |
| 2 | Timpsons | A1 | |
| 3 | Ashford Grill Kebab | A5 | I |
| 4 | Haart | A2 | |
| 5 | Haart | A2 | |
| 6 | Geerings & Colyer | A2 | |
| 7 | The John Wallis | A4 | I |
| 8 | Mobile Cottage (Phones) | A1 | I |
| 9 | Black and White Estate Agency | A2 | I |
| 10 | Andrew and Co | A2 | I |
| 11 | Gould & Harrison | A2 | I |
| 12 | VACANT | A1 | |
| 13 | Ward & Partners | A2 | |
| 14 | Priory Print | A2 | I |
| 14 a | **First Call** | A2 | |
| 15 | Ye Olde Carvery | A1 | I |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **3** | **1** | **1** | **1** | **1** | **1** | **3** | **2** | **2** | **2** | **2** | **1** | | | | |
| **% units vacant** | **19%** | **7%** | **7%** | **7%** | **7%** | **7%** | **19%** | **13%** | **13%** | **13%** | **13%** | **6%** | | | | |
| **Independent units** | | | | | | | | | **7** | **8** | **8** | **8** | | | | |

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**Frontage 12**
New Rents



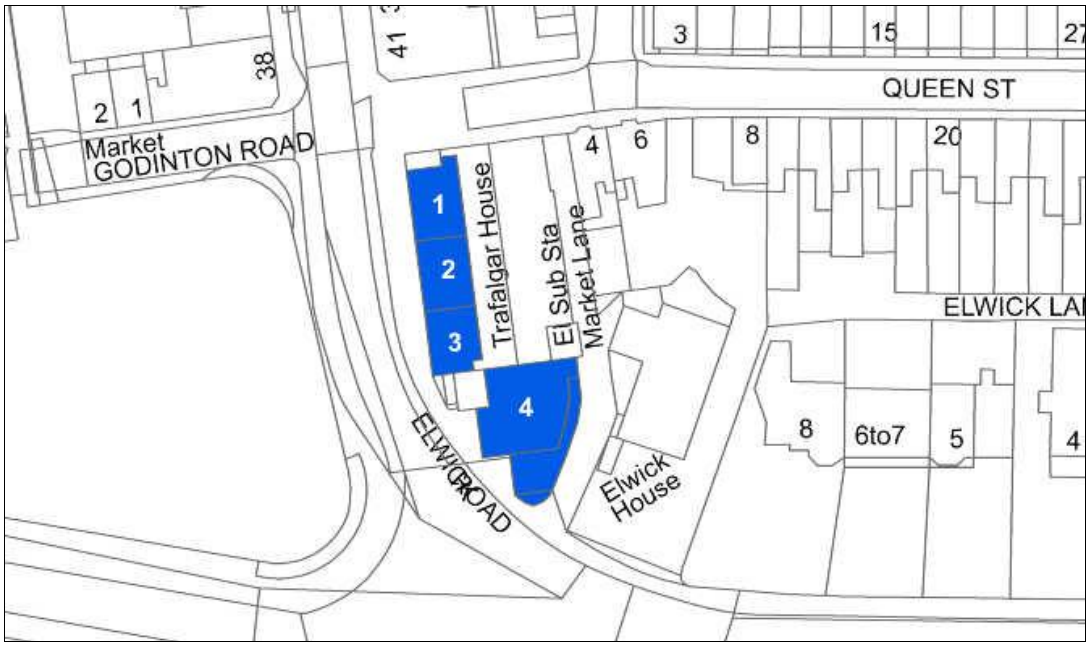

| | | | |
|---|---|---|---|
| **1** | Halifax | A2 | |
| **2** | Café Nero | A3 | |
| **3** | Red Hair | A1 | I |
| **4** | Hospice of Hope | A1 | |
| **5** | Ashford Sewing Centre | A1 | I |
| **6** | Dental Care Centre | D1 | I |
| **7** | The Music Shop | A1 | I |
| **8a** | **Vapeology** | A | I |
| **8** | MM Cash and Carry | A1 | I |
| **9** | VACANT | A3 | |
| **10** | Swinton | A2 | |
| **11** | Swinton | A2 | |
| **12** | Richard Grebby Photographic Studios | A1 | I |
| **13** | Bakudi | A1 | I |
| **14** | Bows Bridal | D1 | I |
| **15** | Dental Care Centre | A2 | I |
| **16** | Seekers | A1 | |
| **17** | Skin Tec Tattoo | D1 | I |
| **18** | Wells Medical Centre | A4 | I |
| **19** | The Auction House | A5 | I |
| **20** | Super Pizza | A1 | I |
| **21** | The Vapour Trail | A1 | I |
| **22** | The Vapour Trail | A1 | I |
| **23** | James Place (Hair Salon) & The Wig Studio | A1 | I |
| **24** | VACANT | A2 | |
| **25** | Coral | A1 | |
| **26** | Topps Jewellery | A1 | I |
| **27** | Hospice Shop | A1 | |
| **28** | KOKO 4 Men Barbers Shop | A2 | I |
| **29** | RBS | A1 | |
| **30** | Aji | A1 | I |
| **31** | Zenith Windows | D1 | |
| **32** | Specialist Orthodontic Practice | A1 | I |
| **33** | Angels Hair and Beauty | A1 | I |

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| Date | Feb 12 | May 12 | Aug 12 | Nov 12 | Feb 13 | May 13 | Aug 13 | Nov 13 | Feb 14 | May 14 | Aug 14 | Nov 14 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| No Units Vacant | 6 | 5 | 5 | 6 | 7 | 6 | 4 | 4 | 5 | 5 | 2 | 2 | | | | |
| % units vacant | 18% | 16% | 15% | 18% | 21% | 18% | 12% | 12% | 15% | 15% | 6% | 6% | | | | |
| Independent units | | | | | | | | | 17 | 19 | 22 | 22 | | | | |

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**Bank Street**



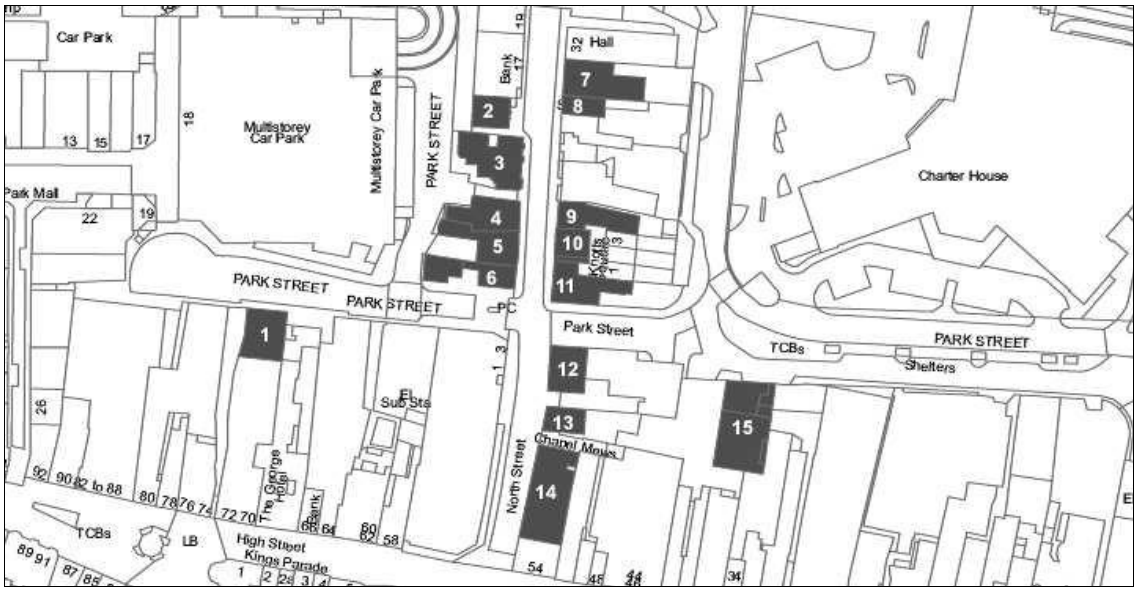

| | | | |
|---|---|---|---|
| 1 & 2 | VACANT | A1 | |
| 3 | VACANT | A1 | |
| 4 | Money Shop | A1 | |

| Date | Feb 12 | May 12 | Aug 12 | Nov 12 | Feb 13 | May 13 | Aug 13 | Nov 13 | Feb 14 | May 14 | Aug 14 | Nov 14 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **2** | **2** | **2** | **2** | **2** | **2** | **2** | **2** | **2** | **3** | **3** | **3** | | | |
| **% units vacant** | **40%** | **40%** | **40%** | **40%** | **40%** | **40%** | **40%** | **40%** | **40%** | **60%** | **60%** | **60%** | | | |
| **Independent units** | | | | | | | | | **1** | **0** | **0** | **0** | | | |

**Note: Unit 4 is classified as 2 units**

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**North Street**




| | | | |
|---|---|---|---|
| 1 | Ashford Youth Centre - Da Base | | I |
| 2 | **Mears** | | |
| ~~3~~ | ~~VACANT (conversion to residential building classification Q1 14)~~ | | |
| 4 | Sight & Sound Security Solutions | | I |
| 5 | Curry Leaf | A3 | I |
| 6 | Cargills Opticians | A1 | I |
| 7 | Amici/Sandersons | A3 & A2 | I |
| 8 | VACANT | D1 | |
| 9 | Little Raj | A3 | I |
| 10 | Nat'ural Hair | A1 | I |
| 11 | Pizza Express | A3 | |
| 12 | Paper Duck World Buffet | A3 | I |
| 13 | Master Cutters | A1 | I |
| 14 | VACANT | A1 | |
| 15 | The Press Rooms | A3 | I |
| 16 | Save the Children | A1 | |

| **Date** | **Feb 12** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **1** | **1** | **2** | **1** | **1** | **2** | **3** | **3** | **3** | **3** | **3** | **2** | | | | |
| **% units vacant** | **6%** | **6%** | **12%** | **6%** | **6%** | **12%** | **18%** | **18%** | **18%** | **20%** | **20%** | **13%** | | | | |
| **Independent units** | | | | | | | | | **10** | **10** | **10** | **10** | | | | |

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**Tufton Street**




| | | | |
|---|---|---|---|
| **1** | Dyson Brown | A1 | I |
| **2** | VACANT | A1 | |
| **3** | FC Wood Funeral Services | D1 | I |
| **4** | The Swan | A4 | I |
| **5** | VACANT | A4 | |

| **Date** | **May 12** | **Aug 12** | **Nov 12** | **Feb 13** | **May 13** | **Aug 13** | **Nov 13** | **Feb 14** | **May 14** | **Aug 14** | **Nov 14** | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **No Units Vacant** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **0** | **2** | **2** | **2** | | | | |
| **% units vacant** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **0%** | **40%** | **40%** | **40%** | | | | |
| **Independent units** | | | | | | | | **5** | **3** | **3** | **3** | | | | |

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**Town Centre Streets Vacancy Rates**

| Date | Feb 12 | May 12 | Aug 12 | Nov 12 | Feb 13 | May 13 | Aug 13 | Nov 13 | Feb 14 | May 14 | Aug 14 | Nov 14 | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total No Units Surveyed** | 220 | 224 | 225 | 225 | 225 | 225 | 224 | 225 | 225 | 227 | 227 | 227 | | | | |
| **No Units Vacant** | 28 | 23 | 25 | 28 | 34 | 34 | 28 | 27 | 27 | 33 | 35 | 32 | | | | |
| **% units vacant** | **13%** | **10%** | **11%** | **12%** | **15%** | **15%** | **13%** | **12%** | **12%** | **15%** | **15%** | **14%** | | | | |
| **Independent units** | | | | | | | | | **105** | **108** | **108** | **110** | | | | |

**County Square Vacancy Rates**

| Date | Feb 12 | May 12 | Aug 12 | Nov 12 | Feb 13 | May 13 | Aug 13 | Nov 13 | Feb 14 | May 14 | Aug 14 | Nov 14 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total No Units Surveyed** | 67 | 67 | 67 | 67 | 67 | 67 | 66 | 66 | 66 | 65 | 65 | 65 | | | |
| **No Units Vacant** | 10 | 12 | 12 | 8 | 10 | 10 | 16 | 15 | 15 | 19 | 16 | 14 | | | |
| **% units vacant** | **15%** | **18%** | **18%** | **12%** | **15%** | **15%** | **24%** | **23%** | **23%** | **29%** | **25%** | **23%** | | | |
| **Independent units** | | | | | | | | | **5** | **7** | **7** | | | | |

**Park Mall Vacancy Rates**

| Date | Feb 12 | May 12 | Aug 12 | Nov 12 | Feb 13 | May 13 | Aug 13 | Nov 13 | Feb 14 | May 14 | Aug 14 | Nov 14 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total No Units Surveyed** | 32 | 32 | 32 | 32 | 32 | 32 | 32 | 32 | 32 | 32 | 32 | 32 | | |
| **No Units Vacant** | 11 | 9 | 8 | 10 | 10 | 9 | 9 | 7 | 7 | 7 | 7 | 6 | | |
| **% units vacant** | **34%** | **28%** | **25%** | **31%** | **31%** | **28%** | **28%** | **22%** | **22%** | **22%** | **22%** | **19%** | | |
| **Independent units** | | | | | | | | | **10** | **10** | **10** | | | |

**Total Vacancy Rate – November 2014**

| Total Shops | Total Vacant | % of shops Vacant | Independent Units |
|---|---|---|---|
| **324** | **52** | **16%** | |

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**Tenterden Shop Frontage North 2014 (Carter Jonas Site Visit)**




| | % of Length | Length m | % of Number | Number |
|---|---|---|---|---|
| **A1** | 63% | 235.7 | 66% | 33 |
| **Non A1** | 37% | 140.6 | 28% | 14 |
| **Vacant** | | | 6% | 3 |

| | | |
|---|---|---|
| * | Warner Gray Estate Agency | A2 |
| * | Kitchen Shop | A1 |
| 1 | The Bathroom Shop | A1 |
| 2 | Travelux Travel Agents | A1 |
| 3 | Potters Home Digital | A1 |
| 4 | Residential | C3 |
| 5 | Swaines | A1 |
| 6 | Honeymoon Chinese Restaurant | A3 |
| 7 | County Clothes | A1 |
| * | Charity Shop | A1 |
| * | Vacant | |
| 8 | Vacant | |
| 9 | Boots | A1 |
| 10 | Tackle and Gun Shop | A1 |
| 11 | Master Cutters Hairdressers | A1 |
| 12 | Lloyds TSB | A2 |
| 13 | Fat Face | A1 |
| 14 | WHSmiths | A1 |
| 15 | Holland and Barrett | A1 |
| 16 | Oxfam | A1 |
| 17 | Ashton Burkinshaw Estate Agents | A2 |
| 18 | Smiths (Florists, Gifts etc.) | A1 |
| 19 | Viyella & CC | A1 |
| 20 | Hospice in the Weald (Charity Shop) | A1 |
| 21 | Town Hall | D1 |
| 22 | Woolpack Hotel | A4 |
| 23 | Rising Start (Gifts, Fancy Goods) | A1 |
| 24 | Crew Clothing | A1 |
| 25 | Santander | A2 |
| 26 | Monsoon | A1 |
| 27 | Femme Fatale | A1 |

| | | |
|---|---|---|
| 28 | Moshalu (Footwear) | A1 |
| 29 | Ward and Partners (Property Agents) | A2 |
| 30 | Bill Skinner ( Jewellery) | A1 |
| 31 | Vacant | |
| 32 | Barclays | A2 |
| 33 | William Charles (Hair Salon) | A1 |
| 34 | Carole Ridley (Ladies Fashion) | A1 |
| 35 | Prezzos | A3 |
| 36 | Natwest | A2 |
| 37 | Paydens Chemist & Tenterden Gift Shop | A1 |
| 38 | Barry Jones Florist | A1 |
| 39 | Tenterden Antiques Centre | A1 |
| 40 | Tenterden Antiques and Silver Vault | A1 |
| 41 | The Antiques Centre of Tenterden | A1 |
| 42 | Sue Ryder Care | A1 |
| 43 | Kensal and Gretel (Gifts) | A1 |
| 44 | Vision Express | D1 |
| 45 | Memories Antiques | A1 |
| 46 | The Vine Inn | A4 |

* Note: Units marked as such are not within the Primary Shopping Frontage

**Tenterden Shop Frontage South (Carter Jonas Site Visit)**




List goes East to West.

| | | |
|---|---|---|
| 1 | Caffe Nero | A3 |
| 2 | Phase Eight | A1 |
| 3 | M& Co | A1 |
| 4 | Vacant | |
| 5 | Savannah (Coffee Shop/Restaurant) | A3 |
| * | James Oliver Estate Agents | A2 |
| 6 | Wilson,Wilson & Hancock Opticians | D1 |
| 7 | The Original Factory Shop | A1 |
| 8 | Costa Coffee | A3 |
| 9 | Thumbelina (Toys, Shoes, Clothes) | A1 |
| 10 | Laura Ashley | A1 |
| 11 | Johnson The Cleaners | A1 |
| 12 | No.25 The High Street (DIY, Locksmith etc.) | A1 |
| 13 | Vacant | |
| 14 | The lemon Tree | A3 |
| * | Waitrose | A1 |
| 15 | East (Fashion) | A1 |
| 16 | Brosnan Bakery | A3 |
| 17 | Mostyn McKenzie (Shoes) | A1 |
| 18 | Nationwide | A2 |
| 19 | Café Rouge | A3 |
| 20 | Webbs of Tenterden | A1 |
| 21 | Waterstones | A1 |
| 22 | Webbs of Tenterden | A1 |
| 23 | Webbs of Tenterden | A1 |
| * | Your Move (Estate Agents) | A2 |
| * | White Stuff (Clothing) | A1 |
| * | White Lion Hotel | C1 |
| * | HSBC | A2 |
| * | Keith Francis (Hairdresser) | A1 |
| * | Beautellies (Beauty Salon) | Sui Generis |
| * | E & R Elizabeth Roce (Fashion) | A1 |

| | | |
|---|---|---|
| * | **Market Square (Between Savannah and Wilson, Wilson & Hancock)** | |
| * | Farm Butchers | A1 |
| * | Majestic Wine | A1 |
| * | **Sayers Lane (Between Laura Ashley & Johnson the Cleaners)** | |
| * | British Red Cross | A1 |
| * | The Nutmeg Deli | A3 |
| * | Cardfair | A1 |
| * | Ibbidi-Bobbidi-Boo (Clothing, Footwear & Jewellery) | A1 |
| * | Between the Lines (Cards, Gifts, Mugs etc.) | A1 |
| * | Mr Bean Coffee House | A3 |
| * | **Sayers Square (End of Sayers Lane)** | |
| * | Poole and Co. (Antiques & Coffee) | A1/A3 |
| * | The Elves and the Shoemaker | A1 |
| * | Figis Womenswear | A1 |
| * | Mia Home & Garden | A1 |
| * | Woodcocks (Interiors) | A1 |

Waitrose: 7 Checkouts and 3 Quick Checkouts

* Note: Units marked as such are not within the Primary Shopping Frontage

# APPENDIX 7A: BASELINE CONVENIENCE CAPACITY ASSESSMENT

**TABLE 1: ALL FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 3.2% | 10.8% | 3.2% | 2.6% | 0.7% | 0.2% | 1.0% | 0.0% | 1.5% | 2.4% |
| | | | | | | | | | | |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 5.1% | 1.1% | 3.5% | 2.7% | 2.5% | 1.0% | 0.2% | 0.0% | 0.5% | 1.5% |
| Farmfoods, New Street | 0.5% | 0.0% | 0.0% | 0.3% | 0.3% | 0.1% | 0.1% | 0.0% | 0.4% | 0.1% |
| | | | | | | | | | | |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 9.8% | 20.0% | 1.9% | 4.8% | 1.6% | 4.9% | 4.5% | 0.8% | 2.1% | 5.4% |
| Sainsbury's, Simone Weil Avenue | 27.8% | 10.3% | 21.2% | 14.1% | 3.4% | 1.5% | 6.8% | 0.1% | 14.2% | 9.0% |
| Tesco Extra, Kingsnorth | 6.8% | 28.8% | 7.5% | 29.0% | 7.1% | 5.0% | 10.5% | 0.0% | 1.1% | 8.8% |
| Tesco Extra, Hythe Road, Crooksfoot | 20.3% | 7.9% | 20.0% | 5.2% | 0.5% | 0.4% | 3.1% | 0.1% | 0.3% | 5.7% |
| Waitrose, Repton Park | 3.1% | 4.2% | 8.2% | 7.6% | 2.1% | 0.1% | 0.0% | 0.1% | 3.9% | 2.5% |
| Tesco Extra, Willesborough | 1.8% | 0.3% | 1.2% | 3.6% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| Tesco Express, Mace Lane | 0.6% | 0.0% | 0.0% | 0.0% | 0.9% | 0.6% | 0.0% | 0.0% | 0.5% | 0.2% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.7% | 0.2% |
| | | | | | | | | | | |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.6% | 3.9% | 18.3% | 4.7% | 0.6% | 0.0% | 0.0% | 2.4% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.9% | 32.5% | 8.8% | 0.4% | 0.3% | 0.0% | 4.2% |
| Other | 0.2% | 0.0% | 0.0% | 0.4% | 4.3% | 0.3% | 0.0% | 0.0% | 0.0% | 0.5% |
| | | | | | | | | | | |
| ASHFORD OTHER - VILLAGES: | 8.0% | 2.5% | 7.4% | 5.8% | 3.2% | 0.6% | 0.2% | 0.0% | 2.7% | 2.7% |
| | | | | | | | | | | |
| CANTERBURY: | 0.0% | 2.6% | 1.4% | 0.1% | 0.0% | 0.0% | 0.7% | 3.5% | 23.9% | 3.0% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 1.6% | 0.4% | 0.5% |
| FOLKESTONE: | 0.5% | 1.2% | 1.5% | 0.5% | 0.7% | 0.5% | 9.4% | 67.1% | 4.6% | 21.9% |
| HASTINGS: | 0.2% | 0.0% | 0.2% | 0.0% | 0.0% | 10.4% | 0.0% | 0.0% | 0.0% | 0.8% |
| HYTHE: | 0.2% | 0.3% | 4.2% | 1.2% | 0.7% | 0.2% | 15.7% | 18.1% | 0.0% | 7.4% |
| MAIDSTONE: | 0.0% | 0.0% | 0.9% | 0.0% | 3.2% | 0.0% | 0.0% | 0.0% | 4.7% | 0.7% |
| | | | | | | | | | | |
| SFT/INTERNET | 10.3% | 8.4% | 4.8% | 2.1% | 5.2% | 9.8% | 7.8% | 4.2% | 6.6% | 6.3% |
| | | | | | | | | | | |
| ALL OTHER SHOPS & STORES: | 1.6% | 1.6% | 11.8% | 10.2% | 12.0% | 50.9% | 39.0% | 4.0% | 28.7% | 13.0% |
| | | | | | | | | | | |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 2: MAIN FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 0.95% | 10.64% | 2.32% | 0.00% | 0.00% | 0.00% | 0.73% | 0.00% | 1.40% | 1.89% |
| | | | | | | | | | | |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 2.48% | 0.71% | 3.42% | 2.73% | 1.63% | 1.47% | 0.00% | 0.00% | 0.00% | 1.01% |
| Farmfoods, New Street | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.63% | 0.04% |
| | | | | | | | | | | |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 11.27% | 17.84% | 1.63% | 5.63% | 1.21% | 5.89% | 5.10% | 0.00% | 2.31% | 5.35% |
| Sainsbury's, Simone Weil Avenue | 33.05% | 6.17% | 25.42% | 15.62% | 3.84% | 2.10% | 9.15% | 0.00% | 20.42% | 9.99% |
| Tesco Extra, Kingsnorth | 9.04% | 30.38% | 9.84% | 35.97% | 10.40% | 7.29% | 12.00% | 0.00% | 1.62% | 10.35% |
| Tesco Extra, Hythe Road, Crooksfoot | 24.96% | 11.27% | 25.88% | 6.63% | 0.75% | 0.57% | 3.94% | 0.00% | 0.00% | 7.24% |
| Waitrose, Repton Park | 1.42% | 3.74% | 7.82% | 6.78% | 2.84% | 0.00% | 0.00% | 0.00% | 4.20% | 2.05% |
| Tesco Extra, Willesborough | 2.20% | 0.53% | 1.39% | 4.48% | 0.61% | 0.00% | 0.00% | 0.00% | 0.00% | 0.73% |
| Tesco Express, Mace Lane | 0.00% | 0.00% | 0.00% | 0.00% | 1.42% | 0.00% | 0.00% | 0.00% | 0.63% | 0.15% |
| Tesco, Grovewood Drive North, Weavering | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 2.25% | 0.13% |
| | | | | | | | | | | |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.00% | 0.00% | 0.93% | 3.80% | 21.00% | 5.13% | 0.73% | 0.00% | 0.00% | 2.41% |
| Tesco, Smallhythe Road | 0.00% | 0.00% | 0.00% | 5.40% | 36.28% | 11.47% | 0.00% | 0.51% | 0.00% | 4.21% |
| Other | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| | | | | | | | | | | |
| ASHFORD OTHER - VILLAGES: | 0.00% | 0.53% | 2.56% | 2.28% | 1.96% | 0.76% | 0.00% | 0.00% | 3.09% | 0.75% |
| | | | | | | | | | | |
| CANTERBURY: | 0.00% | 4.06% | 1.63% | 0.00% | 0.00% | 0.00% | 0.79% | 3.05% | 22.43% | 3.01% |
| DOVER: | 0.00% | 0.00% | 0.00% | 0.00% | 0.61% | 0.00% | 0.00% | 1.71% | 0.63% | 0.64% |
| FOLKESTONE: | 0.00% | 1.37% | 2.32% | 0.68% | 0.61% | 0.76% | 10.73% | 71.76% | 7.15% | 24.97% |
| HASTINGS: | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 13.07% | 0.00% | 0.00% | 0.00% | 0.84% |
| HYTHE: | 0.00% | 0.00% | 4.30% | 0.91% | 0.75% | 0.00% | 16.57% | 17.13% | 0.00% | 7.41% |
| MAIDSTONE: | 0.00% | 0.00% | 0.00% | 0.00% | 2.63% | 0.00% | 0.00% | 0.00% | 3.57% | 0.42% |
| | | | | | | | | | | |
| SFT/INTERNET | 14.65% | 12.76% | 7.06% | 3.19% | 7.02% | 13.19% | 10.78% | 5.85% | 9.55% | 9.09% |
| | | | | | | | | | | |
| ALL OTHER SHOPS & STORES: | 0.00% | 0.00% | 3.49% | 5.89% | 6.46% | 38.30% | 29.50% | 0.00% | 20.14% | 7.35% |
| | | | | | | | | | | |
| TOTAL: | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

**TABLE 3: OTHER MAIN FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 5.7% | 7.1% | 5.4% | 9.9% | 6.5% | 2.2% | 0.7% | 0.0% | 5.6% | 3.4% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 10.4% | 4.4% | 7.2% | 4.9% | 4.3% | 0.0% | 2.2% | 0.0% | 3.3% | 3.2% |
| Farmfoods, New Street | 3.0% | 0.0% | 0.0% | 0.0% | 3.1% | 1.1% | 0.8% | 0.0% | 0.0% | 0.7% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 9.1% | 23.6% | 8.6% | 7.7% | 8.0% | 8.1% | 5.6% | 0.0% | 2.1% | 7.0% |
| Sainsbury's, Simone Weil Avenue | 25.9% | 26.4% | 18.0% | 22.9% | 9.0% | 0.0% | 8.6% | 0.0% | 6.4% | 10.9% |
| Tesco Extra, Kingsnorth | 3.0% | 20.8% | 0.0% | 16.6% | 3.6% | 2.1% | 15.5% | 0.0% | 0.9% | 6.1% |
| Tesco Extra, Hythe Road, Crooksfoot | 15.9% | 0.8% | 16.0% | 3.2% | 0.0% | 0.0% | 1.6% | 0.7% | 3.3% | 3.7% |
| Waitrose, Repton Park | 9.6% | 6.5% | 13.4% | 11.9% | 2.8% | 1.1% | 0.0% | 0.7% | 6.7% | 4.3% |
| Tesco Extra, Willesborough | 1.9% | 0.0% | 3.2% | 4.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.5% | 0.0% | 0.0% | 1.2% | 0.4% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% | 0.2% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 4.6% | 13.1% | 10.8% | 0.0% | 0.0% | 0.0% | 1.7% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.0% | 21.4% | 3.5% | 0.8% | 0.0% | 0.0% | 2.0% |
| Other | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASHFORD OTHER - VILLAGES: | 4.3% | 0.8% | 10.8% | 5.1% | 5.4% | 0.0% | 0.7% | 0.0% | 4.2% | 2.1% |
| CANTERBURY: | 0.0% | 0.0% | 1.3% | 0.9% | 0.0% | 0.0% | 0.9% | 3.8% | 23.8% | 2.7% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.4% |
| FOLKESTONE: | 1.0% | 3.0% | 0.0% | 0.9% | 3.1% | 0.0% | 13.8% | 59.1% | 0.0% | 23.3% |
| HASTINGS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% | 0.8% |
| HYTHE: | 1.9% | 1.4% | 7.7% | 1.2% | 2.2% | 1.9% | 30.5% | 22.9% | 0.0% | 12.4% |
| MAIDSTONE: | 0.0% | 0.0% | 2.2% | 0.0% | 1.8% | 0.0% | 0.0% | 0.0% | 3.6% | 0.4% |
| SFT/INTERNET | 7.4% | 0.8% | 2.1% | 0.0% | 6.1% | 4.0% | 2.2% | 4.3% | 0.0% | 3.5% |
| ALL OTHER SHOPS & STORES: | 0.8% | 4.3% | 3.9% | 1.3% | 9.6% | 45.2% | 16.3% | 7.4% | 34.2% | 10.0% |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 4: TOP UP FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 2.7% | 6.0% | 5.5% | 2.3% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 1.7% |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 5.3% | 0.0% | 1.4% | 3.2% | 3.3% | 0.0% | 0.0% | 0.0% | 1.0% | 1.1% |
| Farmfoods, New Street | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 6.5% | 25.6% | 0.0% | 2.2% | 0.0% | 0.0% | 2.7% | 0.0% | 0.0% | 4.1% |
| Sainsbury's, Simone Weil Avenue | 18.2% | 17.3% | 7.0% | 2.2% | 0.0% | 0.8% | 0.0% | 0.0% | 2.1% | 4.8% |
| Tesco Extra, Kingsnorth | 3.9% | 24.4% | 7.4% | 15.1% | 0.0% | 0.0% | 1.7% | 0.0% | 0.0% | 4.8% |
| Tesco Extra, Hythe Road, Crooksfoot | 14.4% | 3.3% | 10.6% | 3.4% | 0.0% | 0.0% | 2.5% | 0.0% | 0.0% | 3.2% |
| Waitrose, Repton Park | 3.9% | 5.8% | 7.1% | 4.5% | 0.0% | 0.0% | 0.0% | 0.0% | 3.6% | 2.0% |
| Tesco Extra, Willesborough | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |
| Tesco Express, Mace Lane | 3.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 11.6% | 0.8% |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 4.5% | 18.7% | 2.0% | 0.9% | 0.0% | 0.0% | 1.5% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 8.8% | 33.5% | 4.8% | 0.7% | 0.0% | 0.0% | 2.8% |
| Other | 1.3% | 0.0% | 0.0% | 2.7% | 8.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% |
| ASHFORD OTHER - VILLAGES: | 31.8% | 12.8% | 15.3% | 20.8% | 9.5% | 0.8% | 1.0% | 0.0% | 2.1% | 8.1% |
| CANTERBURY: | 0.0% | 0.0% | 1.4% | 0.0% | 0.0% | 0.0% | 0.7% | 6.0% | 25.9% | 3.7% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.4% | 0.0% | 0.9% |
| FOLKESTONE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.5% | 59.3% | 0.0% | 21.5% |
| HASTINGS: | 1.3% | 0.0% | 1.4% | 0.0% | 0.0% | 1.9% | 0.0% | 0.0% | 0.0% | 0.4% |
| HYTHE: | 0.0% | 1.2% | 0.0% | 1.3% | 0.0% | 0.0% | 6.0% | 16.9% | 0.0% | 6.9% |
| MAIDSTONE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 0.1% |
| SFT/INTERNET | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.6% | 3.9% | 0.0% | 2.4% | 0.9% |
| ALL OTHER SHOPS & STORES: | 4.0% | 3.6% | 40.5% | 28.8% | 26.0% | 84.2% | 75.5% | 15.4% | 50.0% | 29.0% |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 5: OTHER TOP UP FOOD SHOPPING - 2014 MARKET SHARE ANALYSIS (%)**

| ZONES | 1a | 1b | 2 | 3 | 4 | 5 | 6 | 7 | 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| ASHFORD TOWN CENTRE: | 15.9% | 22.5% | 3.7% | 13.0% | 0.0% | 0.0% | 1.8% | 0.0% | 0.0% | 5.5% |
| | | | | | | | | | | |
| ASHFORD EDGE-OF-CENTRE: | | | | | | | | | | |
| Lidl, New Street | 16.8% | 1.8% | 3.0% | 0.0% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.2% |
| Farmfoods, New Street | 0.0% | 0.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| | | | | | | | | | | |
| ASHFORD OUT-OF-CENTRE: | | | | | | | | | | |
| ASDA, Kimberley Way | 6.3% | 22.1% | 0.0% | 0.0% | 0.0% | 3.1% | 2.2% | 8.0% | 3.7% | 7.7% |
| Sainsbury's, Simone Weil Avenue | 10.0% | 10.5% | 17.8% | 13.7% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 4.5% |
| Tesco Extra, Kingsnorth | 0.0% | 32.9% | 0.0% | 16.6% | 0.0% | 0.0% | 8.6% | 0.0% | 0.0% | 5.9% |
| Tesco Extra, Hythe Road, Crooksfoot | 2.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Waitrose, Repton Park | 6.6% | 2.2% | 7.4% | 13.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.9% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| TENTERDEN TOWN CENTRE: | | | | | | | | | | |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.0% | 2.8% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 5.6% | 17.5% | 3.1% | 2.2% | 0.0% | 0.0% | 1.3% |
| Other | 0.0% | 0.0% | 0.0% | 0.0% | 30.0% | 3.1% | 0.0% | 0.0% | 0.0% | 1.4% |
| | | | | | | | | | | |
| ASHFORD OTHER - VILLAGES: | 28.5% | 1.8% | 23.8% | 6.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% |
| | | | | | | | | | | |
| CANTERBURY: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.8% | 30.9% | 2.6% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE: | 3.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 6.3% | 56.6% | 0.0% | 26.2% |
| HASTINGS: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 0.0% | 0.0% | 0.0% | 0.1% |
| HYTHE: | 0.0% | 0.0% | 6.0% | 2.8% | 0.0% | 0.0% | 10.0% | 21.5% | 0.0% | 11.0% |
| MAIDSTONE: | 0.0% | 0.0% | 7.1% | 0.0% | 13.5% | 0.0% | 0.0% | 0.0% | 18.4% | 1.7% |
| | | | | | | | | | | |
| SFT/INTERNET | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| ALL OTHER SHOPS & STORES: | 9.6% | 6.3% | 31.1% | 19.5% | 29.0% | 88.2% | 68.9% | 9.6% | 47.1% | 22.8% |
| | | | | | | | | | | |
| TOTAL: | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

# APPENDIX 7B: CONVENIENCE CAPACITY ASSESSMENT – POPULATION SENSITIVITY TEST

## CONVENIENCE GOODS FLOORSPACE CAPACITY ASSESSMENT SCENARIO - POPULATION SENSITIVITY TESTING

**TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)**

| ZONE: | 2011 | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH 2015 to 2030: % | GROWTH 2015 to 2030: 2015-30 |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | 33,138 | 34,760 | 35,139 | 37,032 | 38,818 | 40,391 | 14.9% | 5,252 |
| Zone 1b | 38,091 | 39,665 | 40,089 | 42,218 | 44,227 | 45,990 | 14.7% | 5,901 |
| Zone 2 | 17,612 | 18,100 | 18,282 | 19,207 | 20,103 | 20,900 | 14.3% | 2,618 |
| Zone 3 | 13,463 | 14,303 | 14,453 | 15,204 | 15,917 | 16,543 | 14.5% | 2,090 |
| Zone 4 | 21,655 | 22,412 | 22,641 | 23,796 | 24,885 | 25,853 | 14.2% | 3,212 |
| Zone 5 | 16,453 | 16,895 | 16,995 | 17,625 | 18,359 | 19,046 | 12.1% | 2,051 |
| Zone 6 | 22,027 | 22,315 | 22,432 | 23,089 | 23,847 | 24,567 | 9.5% | 2,135 |
| Zone 7 | 82,789 | 83,630 | 84,070 | 86,567 | 89,335 | 92,006 | 9.4% | 7,936 |
| Zone 8 | 14,238 | 14,570 | 14,691 | 15,304 | 15,931 | 16,525 | 12.5% | 1,834 |
| **Study Area** | 259,466 | 266,650 | **268,792** | **280,042** | **291,422** | **301,821** | **12.3%** | **33,029** |

Source: The base year (2015) population and projections to 2030 have been sourced directly from Experian's latest *'Retail Area Planner'* Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

**TABLE 1B: POPULATION SCENARIO TEST- 10% UPLIFT ZONES 1-4: BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)**

| ZONE: | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: % | GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|
| Zone 1a | 38,236 | 38,653 | 40,735 | 42,700 | 44,430 | 14.9% | 5,777 |
| Zone 1b | 43,632 | 44,098 | 46,440 | 48,650 | 50,589 | 14.7% | 6,491 |
| Zone 2 | 19,910 | 20,110 | 21,128 | 22,113 | 22,990 | 14.3% | 2,880 |
| Zone 3 | 15,733 | 15,898 | 16,724 | 17,509 | 18,197 | 14.5% | 2,299 |
| Zone 4 | 24,653 | 24,905 | 26,176 | 27,374 | 28,438 | 14.2% | 3,533 |
| Zone 5 | 16,895 | 18,695 | 19,388 | 20,195 | 20,951 | 12.1% | 2,256 |
| Zone 6 | 22,315 | 24,675 | 25,398 | 26,232 | 27,024 | 9.5% | 2,349 |
| Zone 7 | 83,630 | 92,477 | 95,224 | 98,269 | 101,207 | 9.4% | 8,730 |
| Zone 8 | 14,570 | 16,160 | 16,834 | 17,524 | 18,178 | 12.5% | 2,017 |
| **Study Area** | **266,650** | **295,671** | **308,046** | **320,564** | **332,003** | **12.3%** | **36,332** |

Source: The population scenorio test assumes a higher population growth than the ONS based projections for Zones 1 to 4, which correspond to the Ashford Borough area. The above table applies a 10% uplift on the ONS 2012-based Sub National Population Projections for 2014, 2015, 2020, 2025, and 2030.

**TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | % GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|
| **EXPERIAN - SPECIAL FORMS OF TRADING (%):** | | **2.6%** | **2.8%** | **4.0%** | **4.9%** | **5.4%** | 92.9% |
| **REVISED SPECIAL FORMS OF TRADING (%):** | | **1.6%** | **1.8%** | **2.5%** | **3.0%** | **3.4%** | 92.6% |
| Zone 1a | £1,971 | £1,940 | £1,946 | £1,986 | £2,035 | £2,089 | 7.4% |
| Zone 1b | £1,858 | £1,828 | £1,834 | £1,871 | £1,918 | £1,969 | 7.4% |
| Zone 2 | £2,498 | £2,458 | £2,466 | £2,516 | £2,579 | £2,648 | 7.4% |
| Zone 3 | £2,430 | £2,391 | £2,399 | £2,448 | £2,509 | £2,576 | 7.4% |
| Zone 4 | £2,400 | £2,362 | £2,369 | £2,417 | £2,478 | £2,544 | 7.4% |
| Zone 5 | £2,435 | £2,397 | £2,405 | £2,453 | £2,514 | £2,582 | 7.4% |
| Zone 6 | £2,278 | £2,242 | £2,249 | £2,295 | £2,352 | £2,415 | 7.4% |
| Zone 7 | £2,088 | £2,055 | £2,062 | £2,104 | £2,156 | £2,214 | 7.4% |
| Zone 8 | £2,344 | £2,306 | £2,314 | £2,361 | £2,420 | £2,485 | 7.4% |
| **Study Area** | £2,256 | £2,220 | **£2,227** | **£2,272** | **£2,329** | **£2,391** | **7.4%** |

**TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2015) TO 2030 (£m)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: 2015-30 % | GROWTH: 2015-30 £m |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | £75.4 | £74.2 | £75.2 | £80.9 | £86.9 | £92.8 | 23.4% | £17.6 |
| Zone 1b | £81.0 | £79.8 | £80.9 | £86.9 | £93.3 | £99.6 | 23.2% | £18.7 |
| Zone 2 | £49.7 | £48.9 | £49.6 | £53.2 | £57.0 | £60.9 | 22.7% | £11.3 |
| Zone 3 | £38.2 | £37.6 | £38.1 | £40.9 | £43.9 | £46.9 | 22.9% | £8.7 |
| Zone 4 | £59.2 | £58.2 | £59.0 | £63.3 | £67.8 | £72.3 | 22.6% | £13.3 |
| Zone 5 | £41.1 | £40.5 | £45.0 | £47.6 | £50.8 | £54.1 | 20.3% | £9.1 |
| Zone 6 | £50.8 | £50.0 | £55.5 | £58.3 | £61.7 | £65.3 | 17.6% | £9.8 |
| Zone 7 | £174.6 | £171.9 | £190.7 | £200.3 | £211.9 | £224.0 | 17.5% | £33.4 |
| Zone 8 | £34.1 | £33.6 | £37.4 | £39.7 | £42.4 | £45.2 | 20.8% | £7.8 |
| **Study Area** | £604.2 | £594.7 | **£631.3** | **£671.1** | **£715.7** | **£761.1** | **20.6%** | **£129.7** |

**TABLE 4: ALL CONVENIENCE GOODS - 2014 MARKET SHAREANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 3.6% | 11.8% | 3.4% | 2.7% | 0.7% | 0.2% | 1.1% | 0.0% | 1.6% | 2.6% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 5.7% | 1.2% | 3.6% | 2.8% | 2.6% | 1.1% | 0.2% | 0.0% | 0.5% | 1.6% |
| Farmfoods, New Street | 0.6% | 0.0% | 0.0% | 0.4% | 0.3% | 0.1% | 0.1% | 0.0% | 0.4% | 0.2% |
| **ASHFORD OUT-OF-CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| ASDA, Kimberley Way | 11.0% | 21.8% | 2.0% | 4.9% | 1.7% | 5.5% | 4.9% | 0.8% | 2.2% | 5.8% |
| Sainsbury's, Simone Weil Avenue | 31.0% | 11.2% | 22.2% | 14.4% | 3.6% | 1.6% | 7.4% | 0.2% | 15.2% | 9.6% |
| Tesco Extra, Kingsnorth | 7.5% | 31.4% | 7.9% | 29.6% | 7.5% | 5.5% | 11.4% | 0.0% | 1.2% | 9.4% |
| Tesco Extra, Hythe Road, Crooksfoot | 22.6% | 8.6% | 21.0% | 5.3% | 0.5% | 0.4% | 3.4% | 0.1% | 0.4% | 6.1% |
| Waitrose, Repton Park | 3.5% | 4.6% | 8.6% | 7.8% | 2.2% | 0.1% | 0.0% | 0.1% | 4.2% | 2.6% |
| Tesco Extra, Willesborough | 2.0% | 0.4% | 1.3% | 3.7% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% |
| Tesco Express, Mace Lane | 0.7% | 0.0% | 0.0% | 0.0% | 1.0% | 0.6% | 0.0% | 0.0% | 0.6% | 0.2% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.9% | 0.3% |
| **TENTERDEN TOWN CENTRE:** | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Waitrose, Sayers Lane | 0.0% | 0.0% | 0.6% | 4.0% | 19.3% | 5.2% | 0.7% | 0.0% | 0.0% | 2.5% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 6.0% | 34.3% | 9.8% | 0.4% | 0.3% | 0.0% | 4.4% |
| Other | 0.2% | 0.0% | 0.0% | 0.4% | 4.6% | 0.3% | 0.0% | 0.0% | 0.0% | 0.5% |
| **ASHFORD OTHER - VILLAGES:** | 9.0% | 2.8% | 7.8% | 5.9% | 3.4% | 0.7% | 0.2% | 0.0% | 2.9% | 2.9% |
| CANTERBURY: | 0.0% | 2.9% | 1.5% | 0.1% | 0.0% | 0.0% | 0.8% | 3.7% | 25.6% | 3.2% |
| DOVER: | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 1.7% | 0.4% | 0.6% |
| FOLKESTONE: | 0.5% | 1.3% | 1.6% | 0.5% | 0.7% | 0.5% | 10.2% | 70.1% | 5.0% | 23.4% |
| HASTINGS: | 0.2% | 0.0% | 0.2% | 0.0% | 0.0% | 11.6% | 0.0% | 0.0% | 0.0% | 0.8% |
| HYTHE: | 0.2% | 0.4% | 4.4% | 1.2% | 0.7% | 0.2% | 17.1% | 18.9% | 0.0% | 7.9% |
| MAIDSTONE: | 0.0% | 0.0% | 1.0% | 0.0% | 3.4% | 0.0% | 0.0% | 0.0% | 5.1% | 0.7% |
| **ALL OTHER SHOPS & STORES:** | 1.8% | 1.8% | 12.4% | 10.5% | 12.6% | 56.4% | 42.3% | 4.2% | 30.7% | 13.9% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

**TABLE 5: ALL CONVENIENCE GOODS - 2015 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £75.2 | £80.9 | £49.6 | £38.1 | £59.0 | £45.0 | £55.5 | £190.7 | £37.4 | £631.3 |
| **ASHFORD TOWN CENTRE:** | £2.7 | £9.5 | £1.7 | £1.0 | £0.4 | £0.1 | £0.6 | £0.0 | £0.6 | £16.6 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £4.3 | £1.0 | £1.8 | £1.1 | £1.5 | £0.5 | £0.1 | £0.0 | £0.2 | £10.5 |
| Farmfoods, New Street | £0.4 | £0.0 | £0.0 | £0.1 | £0.2 | £0.1 | £0.0 | £0.0 | £0.2 | £1.0 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| ASDA, Kimberley Way | £8.2 | £17.65 | £1.0 | £1.9 | £1.0 | £2.5 | £2.7 | £1.6 | £0.8 | £37.3 |
| Sainsbury's, Simone Weil Avenue | £23.3 | £9.1 | £11.0 | £5.5 | £2.1 | £0.7 | £4.1 | £0.3 | £5.7 | £61.8 |
| Tesco Extra, Kingsnorth | £5.7 | £25.4 | £3.9 | £11.3 | £4.4 | £2.5 | £6.3 | £0.0 | £0.5 | £59.9 |
| Tesco Extra, Hythe Road, Crooksfoot | £17.0 | £7.0 | £10.4 | £2.0 | £0.3 | £0.2 | £1.9 | £0.1 | £0.1 | £39.0 |
| Waitrose, Repton Park | £2.6 | £3.7 | £4.3 | £3.0 | £1.3 | £0.1 | £0.0 | £0.1 | £1.6 | £16.7 |
| Tesco Extra, Willesborough | £1.5 | £0.3 | £0.6 | £1.4 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £4.1 |
| Tesco Express, Mace Lane | £0.5 | £0.0 | £0.0 | £0.0 | £0.6 | £0.3 | £0.0 | £0.0 | £0.2 | £1.6 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £1.5 | £1.7 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| Waitrose, Sayers Lane | £0.0 | £0.0 | £0.3 | £1.5 | £11.4 | £2.3 | £0.4 | £0.0 | £0.0 | £15.9 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £2.3 | £20.2 | £4.4 | £0.2 | £0.7 | £0.0 | £27.8 |
| Other | £0.2 | £0.0 | £0.0 | £0.2 | £2.7 | £0.2 | £0.0 | £0.0 | £0.0 | £3.2 |
| **ASHFORD OTHER - VILLAGES:** | £6.7 | £2.2 | £3.9 | £2.2 | £2.0 | £0.3 | £0.1 | £0.0 | £1.1 | £18.6 |
| CANTERBURY: | £0.0 | £2.3 | £0.7 | £0.0 | £0.0 | £0.0 | £0.4 | £7.1 | £9.6 | £20.2 |
| DOVER: | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £3.2 | £0.2 | £3.6 |
| FOLKESTONE: | £0.4 | £1.1 | £0.8 | £0.2 | £0.4 | £0.2 | £5.6 | £133.6 | £1.9 | £144.2 |
| HASTINGS: | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £5.2 | £0.0 | £0.0 | £0.0 | £5.5 |
| HYTHE: | £0.2 | £0.3 | £2.2 | £0.5 | £0.4 | £0.1 | £9.5 | £36.0 | £0.0 | £49.1 |
| MAIDSTONE: | £0.0 | £0.0 | £0.5 | £0.0 | £2.0 | £0.0 | £0.0 | £0.0 | £1.9 | £4.4 |
| **ALL OTHER SHOPS & STORES:** | £1.4 | £1.4 | £6.2 | £4.0 | £7.4 | £25.4 | £23.5 | £8.0 | £11.5 | £88.7 |
| **TOTAL:** | £75.2 | £80.9 | £49.6 | £38.1 | £59.0 | £45.0 | £55.5 | £190.7 | £37.4 | £631.3 |

**TABLE 6: ALL CONVENIENCE GOODS - 2020 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £80.9 | £86.9 | £53.2 | £40.9 | £63.3 | £47.6 | £58.3 | £200.3 | £39.7 | £671.1 |
| **ASHFORD TOWN CENTRE:** | £2.9 | £10.2 | £1.8 | £1.1 | £0.4 | £0.1 | £0.6 | £0.0 | £0.6 | £17.8 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £4.6 | £1.0 | £1.9 | £1.1 | £1.7 | £0.5 | £0.1 | £0.0 | £0.2 | £11.2 |
| Farmfoods, New Street | £0.5 | £0.0 | £0.0 | £0.1 | £0.2 | £0.1 | £0.1 | £0.0 | £0.2 | £1.1 |
| **ASHFORD OUT-OF-CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| ASDA, Kimberley Way | £8.9 | £18.97 | £1.1 | £2.0 | £1.1 | £2.6 | £2.8 | £1.7 | £0.9 | £40.0 |
| Sainsbury's, Simone Weil Avenue | £25.0 | £9.8 | £11.8 | £5.9 | £2.3 | £0.8 | £4.3 | £0.3 | £6.0 | £66.2 |
| Tesco Extra, Kingsnorth | £6.1 | £27.3 | £4.2 | £12.1 | £4.8 | £2.6 | £6.6 | £0.0 | £0.5 | £64.1 |
| Tesco Extra, Hythe Road, Crooksfoot | £18.3 | £7.5 | £11.2 | £2.2 | £0.3 | £0.2 | £2.0 | £0.1 | £0.1 | £41.8 |
| Waitrose, Repton Park | £2.8 | £4.0 | £4.6 | £3.2 | £1.4 | £0.1 | £0.0 | £0.1 | £1.7 | £17.9 |
| Tesco Extra, Willesborough | £1.6 | £0.3 | £0.7 | £1.5 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £4.4 |
| Tesco Express, Mace Lane | £0.5 | £0.0 | £0.0 | £0.0 | £0.6 | £0.3 | £0.0 | £0.0 | £0.2 | £1.7 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £1.6 | £1.8 |
| **TENTERDEN TOWN CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Waitrose, Sayers Lane | £0.0 | £0.0 | £0.3 | £1.6 | £12.2 | £2.5 | £0.4 | £0.0 | £0.0 | £17.0 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £2.5 | £21.7 | £4.7 | £0.3 | £0.7 | £0.0 | £29.8 |
| Other | £0.2 | £0.0 | £0.0 | £0.2 | £2.9 | £0.2 | £0.0 | £0.0 | £0.0 | £3.4 |
| **ASHFORD OTHER - VILLAGES:** | £7.3 | £2.4 | £4.1 | £2.4 | £2.2 | £0.3 | £0.1 | £0.0 | £1.2 | £20.0 |
| CANTERBURY: | £0.0 | £2.5 | £0.8 | £0.0 | £0.0 | £0.0 | £0.5 | £7.4 | £10.2 | £21.4 |
| DOVER: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £3.3 | £0.2 | £3.7 |
| FOLKESTONE: | £0.4 | £1.1 | £0.8 | £0.2 | £0.5 | £0.3 | £5.9 | £140.4 | £2.0 | £151.6 |
| HASTINGS: | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £5.5 | £0.0 | £0.0 | £0.0 | £5.8 |
| HYTHE: | £0.2 | £0.3 | £2.3 | £0.5 | £0.5 | £0.1 | £9.9 | £37.9 | £0.0 | £51.7 |
| MAIDSTONE: | £0.0 | £0.0 | £0.5 | £0.0 | £2.2 | £0.0 | £0.0 | £0.0 | £2.0 | £4.7 |
| **ALL OTHER SHOPS & STORES:** | £1.5 | £1.5 | £6.6 | £4.3 | £8.0 | £26.8 | £24.7 | £8.4 | £12.2 | £94.0 |
| **TOTAL:** | £80.9 | £86.9 | £53.2 | £40.9 | £63.3 | £47.6 | £58.3 | £200.3 | £39.7 | £671.1 |

**TABLE 7: ALL COMPARISON GOODS - 2025 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £86.9 | £93.3 | £57.0 | £43.9 | £67.8 | £50.8 | £61.7 | £211.9 | £42.4 | £715.7 |
| **ASHFORD TOWN CENTRE:** | £3.1 | £11.0 | £1.9 | £1.2 | £0.5 | £0.1 | £0.7 | £0.0 | £0.7 | £19.1 |
| **ASHFORD EDGE-OF-CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Lidl, New Street | £5.0 | £1.1 | £2.1 | £1.2 | £1.8 | £0.5 | £0.1 | £0.0 | £0.2 | £12.0 |
| Farmfoods, New Street | £0.5 | £0.0 | £0.0 | £0.2 | £0.2 | £0.1 | £0.1 | £0.0 | £0.2 | £1.2 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| ASDA, Kimberley Way | £9.5 | £20.36 | £1.2 | £2.1 | £1.1 | £2.8 | £3.0 | £1.8 | £0.9 | £42.8 |
| Sainsbury's, Simone Weil Avenue | £26.9 | £10.5 | £12.7 | £6.3 | £2.4 | £0.8 | £4.6 | £0.3 | £6.5 | £71.0 |
| Tesco Extra, Kingsnorth | £6.5 | £29.3 | £4.5 | £13.0 | £5.1 | £2.8 | £7.0 | £0.0 | £0.5 | £68.7 |
| Tesco Extra, Hythe Road, Crooksfoot | £19.6 | £8.0 | £12.0 | £2.3 | £0.3 | £0.2 | £2.1 | £0.2 | £0.2 | £44.9 |
| Waitrose, Repton Park | £3.0 | £4.3 | £4.9 | £3.4 | £1.5 | £0.1 | £0.0 | £0.2 | £1.8 | £19.2 |
| Tesco Extra, Willesborough | £1.8 | £0.4 | £0.7 | £1.6 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £4.7 |
| Tesco Express, Mace Lane | £0.6 | £0.0 | £0.0 | £0.0 | £0.7 | £0.3 | £0.0 | £0.0 | £0.2 | £1.8 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £1.7 | £1.9 |
| **TENTERDEN TOWN CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Waitrose, Sayers Lane | £0.0 | £0.0 | £0.4 | £1.7 | £13.1 | £2.6 | £0.4 | £0.0 | £0.0 | £18.2 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £2.6 | £23.2 | £5.0 | £0.3 | £0.7 | £0.0 | £31.9 |
| Other | £0.2 | £0.0 | £0.0 | £0.2 | £3.1 | £0.2 | £0.0 | £0.0 | £0.0 | £3.6 |
| **ASHFORD OTHER - VILLAGES:** | £7.8 | £2.6 | £4.4 | £2.6 | £2.3 | £0.3 | £0.1 | £0.0 | £1.2 | £21.4 |
| CANTERBURY: | £0.0 | £2.7 | £0.8 | £0.0 | £0.0 | £0.0 | £0.5 | £7.8 | £10.9 | £22.7 |
| DOVER: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £3.5 | £0.2 | £4.0 |
| FOLKESTONE: | £0.4 | £1.2 | £0.9 | £0.2 | £0.5 | £0.3 | £6.3 | £148.5 | £2.1 | £160.4 |
| HASTINGS: | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £5.9 | £0.0 | £0.0 | £0.0 | £6.2 |
| HYTHE: | £0.2 | £0.3 | £2.5 | £0.5 | £0.5 | £0.1 | £10.5 | £40.0 | £0.0 | £54.7 |
| MAIDSTONE: | £0.0 | £0.0 | £0.6 | £0.0 | £2.3 | £0.0 | £0.0 | £0.0 | £2.1 | £5.0 |
| **ALL OTHER SHOPS & STORES:** | £1.6 | £1.6 | £7.1 | £4.6 | £8.6 | £28.6 | £26.1 | £8.9 | £13.0 | £100.1 |
| **TOTAL:** | £86.9 | £93.3 | £57.0 | £43.9 | £67.8 | £50.8 | £61.7 | £211.9 | £42.4 | £715.7 |

**TABLE 8: ALL CONVENIENCE GOODS - 2030 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £92.8 | £99.6 | £60.9 | £46.9 | £72.3 | £54.1 | £65.3 | £224.0 | £45.2 | £761.1 |
| **ASHFORD TOWN CENTRE:** | £3.3 | £11.7 | £2.1 | £1.3 | £0.5 | £0.1 | £0.7 | £0.0 | £0.7 | £20.4 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £5.3 | £1.2 | £2.2 | £1.3 | £1.9 | £0.6 | £0.2 | £0.0 | £0.2 | £12.9 |
| Farmfoods, New Street | £0.5 | £0.0 | £0.0 | £0.2 | £0.2 | £0.1 | £0.1 | £0.0 | £0.2 | £1.2 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| ASDA, Kimberley Way | £10.2 | £21.74 | £1.2 | £2.3 | £1.2 | £3.0 | £3.2 | £1.9 | £1.0 | £45.7 |
| Sainsbury's, Simone Weil Avenue | £28.7 | £11.2 | £13.5 | £6.8 | £2.6 | £0.9 | £4.8 | £0.3 | £6.9 | £75.8 |
| Tesco Extra, Kingsnorth | £7.0 | £31.3 | £4.8 | £13.9 | £5.4 | £3.0 | £7.4 | £0.0 | £0.6 | £73.3 |
| Tesco Extra, Hythe Road, Crooksfoot | £20.9 | £8.6 | £12.8 | £2.5 | £0.4 | £0.2 | £2.2 | £0.2 | £0.2 | £47.9 |
| Waitrose, Repton Park | £3.2 | £4.5 | £5.3 | £3.6 | £1.6 | £0.1 | £0.0 | £0.2 | £1.9 | £20.4 |
| Tesco Extra, Willesborough | £1.9 | £0.4 | £0.8 | £1.7 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £5.1 |
| Tesco Express, Mace Lane | £0.6 | £0.0 | £0.0 | £0.0 | £0.7 | £0.3 | £0.0 | £0.0 | £0.3 | £1.9 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £1.8 | £2.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| Waitrose, Sayers Lane | £0.0 | £0.0 | £0.4 | £1.9 | £13.9 | £2.8 | £0.4 | £0.0 | £0.0 | £19.4 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £2.8 | £24.8 | £5.3 | £0.3 | £0.8 | £0.0 | £34.0 |
| Other | £0.2 | £0.0 | £0.0 | £0.2 | £3.3 | £0.2 | £0.0 | £0.0 | £0.0 | £3.9 |
| **ASHFORD OTHER - VILLAGES:** | £8.3 | £2.7 | £4.7 | £2.8 | £2.5 | £0.4 | £0.2 | £0.0 | £1.3 | £22.9 |
| CANTERBURY: | £0.0 | £2.9 | £0.9 | £0.0 | £0.0 | £0.0 | £0.5 | £8.3 | £11.6 | £24.2 |
| DOVER: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £3.7 | £0.2 | £4.2 |
| FOLKESTONE: | £0.5 | £1.3 | £1.0 | £0.3 | £0.5 | £0.3 | £6.6 | £157.0 | £2.2 | £169.7 |
| HASTINGS: | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £6.3 | £0.0 | £0.0 | £0.0 | £6.6 |
| HYTHE: | £0.2 | £0.4 | £2.7 | £0.6 | £0.5 | £0.1 | £11.1 | £42.3 | £0.0 | £57.9 |
| MAIDSTONE: | £0.0 | £0.0 | £0.6 | £0.0 | £2.5 | £0.0 | £0.0 | £0.0 | £2.3 | £5.4 |
| **ALL OTHER SHOPS & STORES:** | £1.7 | £1.7 | £7.6 | £4.9 | £9.1 | £30.5 | £27.6 | £9.4 | £13.9 | £106.4 |
| **TOTAL:** | £92.8 | £99.6 | £60.9 | £46.9 | £72.3 | £54.1 | £65.3 | £224.0 | £45.2 | £761.1 |

**TABLE 9: ESTIMATED 'INFLOW' (TRADE DRAW) FROM OUTSIDE STUDY AREA & TOTAL FORECAST TURNOVERS**

| | Estimated 'Inflow' from Outside Study Area | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| **Ashford Town Centre** | 0% | £16.6 | £17.8 | £19.1 | £20.4 |
| **Tenterden Town Centre** | 0% | £46.9 | £50.2 | £53.7 | £57.3 |
| **Other Villages/ shops in Ashford Borough:** | 0% | £18.6 | £20.0 | £21.4 | £22.9 |
| **Edge and Out of Centre Foodstores** | 0% | £233.6 | £250.2 | £268.2 | £286.1 |
| **ASHFORD BOROUGH - TOTAL:** | | **£315.7** | **£338.2** | **£362.5** | **£386.7** |

Notes: 'Inflow' (trade draw) represents the potential expenditure from commuters, tourists and visitors to the Borough's main centres, shops and stores who live outside the defined study area (i.e. beyond Zones 1-8).

**TABLE 10: NEW RETAIL COMMITMENTS - ESTIMATED CONVENIENCE GOODS SALES AREAS & BENCHMARK TURNOVERS**

| | | LPA Planning Ref | Estimated Sales Area ($m^2$ net) | Average Sales (£ per $m^2$) | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|---|---|---|
| Tesco Stores Ltd, Smallhythe Road | TTC - Edge of Centre | 10/01036/AS | 846 | £10,750 | £9.1 | £9.0 | £9.0 | £9.1 |
| Foodstore, Cheeseman's Green (Finberry) | Planned Local Centre | 02/00278/AS | 1,715 | £12,250 | £21.0 | £20.8 | £20.8 | £20.9 |
| Foodstore, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 1,519 | £12,250 | £18.6 | £18.4 | £18.4 | £18.5 |
| Retail units, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 643 | £5,000 | £3.2 | £3.2 | £3.2 | £3.2 |
| Retail units, Chilmington Green (Local Centre) | Planned Local Centre | 12/00400/AS | 119 | £5,000 | £0.6 | £0.6 | £0.6 | £0.6 |
| **TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPACE (£m):** | | | | | **£52.5** | **£51.9** | **£52.0** | **£52.3** |

Notes: Net floor areas based on 70% of gross floor area for each committed scheme as identified by Ashford Borough Council or from planning application documents.

Net sales densities are based on information from the corresponding planning application or based average sales density for similar type schemes.

Annual productivitiy growth identified in Tables 4a and 4b, Retail Planner Briefing Note 12.1: Addendum (October 2014) is applied to identify forecast turnover ranging from 2% to 3.8%.

**TABLE 11: ASHFORD BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £315.7 | £338.2 | £362.5 | £386.7 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) [1]: | £315.7 | £311.9 | £312.5 | £314.1 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £26.3 | £49.9 | £72.6 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £51.9 | £52.0 | £52.3 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£25.6** | **-£2.1** | **£20.3** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-2,118** | **-170** | **1,669** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -3,025 | -243 | 2,384 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-4,717** | **-379** | **3,717** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | -6,739 | -541 | 5,310 |

**TABLE 12: ASHFORD TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £16.6 | £17.8 | £19.1 | £20.4 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £16.6 | £16.4 | £16.4 | £16.5 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £1.4 | £2.7 | £3.9 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **£1.4** | **£2.7** | **£3.9** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **116** | **220** | **318** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 166 | 315 | 454 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **259** | **490** | **708** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | 370 | 701 | 1,011 |

**TABLE 13: TENTERDEN TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT**

***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £46.9 | £50.2 | £53.7 | £57.3 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £46.9 | £46.4 | £46.4 | £46.7 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £3.8 | £7.3 | £10.6 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £9.0 | £9.0 | £9.1 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£5.2** | **-£1.7** | **£1.6** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-426** | **-141** | **130** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -608 | -201 | 185 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-949** | **-314** | **289** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | -1,355 | -448 | 412 |

**TABLE 14: LOCAL/ VILLAGE CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT**

***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £18.6 | £20.0 | £21.4 | £22.9 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £18.6 | £18.4 | £18.4 | £18.5 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £1.6 | £3.0 | £4.3 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £0.0 | £0.0 | £0.0 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **£1.6** | **£3.0** | **£4.3** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **130** | **247** | **357** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 186 | 353 | 510 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **290** | **550** | **795** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | 415 | 786 | 1,135 |

**TABLE 15: REST OF BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT**

***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £233.6 | £250.2 | £268.2 | £286.1 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £233.6 | £230.8 | £231.2 | £232.4 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £19.4 | £37.0 | £53.7 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £42.9 | £43.0 | £43.2 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£23.5** | **-£6.0** | **£10.5** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-1,939** | **-496** | **865** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -2,769 | -709 | 1,235 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **-4,318** | **-1,106** | **1,926** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | -6,168 | -1,580 | 2,751 |

**TABLE 16: ASHFORD TOWN CENTRE - IMPROVED MARKET SHARE (+15%)**

***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| | **CURRENT RETENTION FROM ZONES 1-4: 5.1%** | | | | |
| | **IMPROVED RETENTION FROM ZONES 1-4: 20.1%** | | | | |
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £62.0 | £66.6 | £71.4 | £76.2 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £62.0 | £61.3 | £61.4 | £61.7 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £5.3 | £10.0 | £14.5 |
| STEP 4: | CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **£5.3** | **£10.0** | **£14.5** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | **Superstore** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,250 | £12,104 | £12,128 | £12,189 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **437** | **826** | **1,192** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 624 | 1,180 | 1,703 |
| | **Supermarket/ Deep Discounter** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £5,434 | £5,445 | £5,472 |
| | **(ii) Net Floorspace Capacity (sq m):** | **-** | **973** | **1,840** | **2,655** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | | 1,390 | 2,628 | 3,792 |

# APPENDIX 8A: BASELINE COMPARISON CAPACITY ASSESSMENT

**TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)**

| ZONE: | 2011 | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: % | GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | 33,138 | 34,760 | 35,139 | 37,032 | 38,818 | 40,391 | 14.9% | 5,252 |
| Zone 1b | 38,091 | 39,665 | 40,089 | 42,218 | 44,227 | 45,990 | 14.7% | 5,901 |
| Zone 2 | 17,612 | 18,100 | 18,282 | 19,207 | 20,103 | 20,900 | 14.3% | 2,618 |
| Zone 3 | 13,463 | 14,303 | 14,453 | 15,204 | 15,917 | 16,543 | 14.5% | 2,090 |
| Zone 4 | 21,655 | 22,412 | 22,641 | 23,796 | 24,885 | 25,853 | 14.2% | 3,212 |
| Zone 5 | 16,453 | 16,895 | 16,995 | 17,625 | 18,359 | 19,046 | 12.1% | 2,051 |
| Zone 6 | 22,027 | 22,315 | 22,432 | 23,089 | 23,847 | 24,567 | 9.5% | 2,135 |
| Zone 7 | 82,789 | 83,630 | 84,070 | 86,567 | 89,335 | 92,006 | 9.4% | 7,936 |
| Zone 8 | 14,238 | 14,570 | 14,691 | 15,304 | 15,931 | 16,525 | 12.5% | 1,834 |
| **Study Area** | 259,466 | 266,650 | **268,792** | **280,042** | **291,422** | **301,821** | **12.3%** | **33,029** |

Source: The base year (2015) population and projections to 2030 have been sourced directly from Experian's latest *'Retail Area Planner'* Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

**TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | % GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|
| **EXPERIAN - SPECIAL FORMS OF TRADING (%):** | | **11.7%** | **12.5%** | **15.7%** | **15.9%** | **15.6%** | 24.8% |
| **REVISED SPECIAL FORMS OF TRADING (%):** | | **12.0%** | **12.8%** | **16.1%** | **16.3%** | **16.0%** | 25.3% |
| Zone 1a | £3,183 | £2,801 | £2,899 | £3,246 | £3,804 | £4,491 | 54.9% |
| Zone 1b | £2,942 | £2,589 | £2,680 | £3,001 | £3,516 | £4,151 | 54.9% |
| Zone 2 | £4,517 | £3,975 | £4,114 | £4,607 | £5,398 | £6,373 | 54.9% |
| Zone 3 | £4,307 | £3,791 | £3,923 | £4,392 | £5,147 | £6,077 | 54.9% |
| Zone 4 | £4,198 | £3,694 | £3,823 | £4,281 | £5,017 | £5,923 | 54.9% |
| Zone 5 | £4,158 | £3,659 | £3,787 | £4,241 | £4,969 | £5,866 | 54.9% |
| Zone 6 | £3,558 | £3,131 | £3,241 | £3,629 | £4,252 | £5,020 | 54.9% |
| Zone 7 | £3,371 | £2,967 | £3,070 | £3,438 | £4,029 | £4,756 | 54.9% |
| Zone 8 | £4,068 | £3,580 | £3,705 | £4,149 | £4,862 | £5,740 | 54.9% |
| **Study Area** | £3,811 | £3,354 | **£3,471** | **£3,887** | **£4,555** | **£5,377** | **54.9%** |

Source: Average spend per capita estimates (2013 prices) are derived from Experian *'Retail Area Planner' Reports* using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 12.1 published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on and over forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 12.1.

**TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2014 - 2030 (£m)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: 2015-30 % | GROWTH: 2015-30 £m |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | £105.5 | £97.4 | £101.9 | £120.2 | £147.7 | £181.4 | 78.1% | £79.5 |
| Zone 1b | £112.1 | £102.7 | £107.4 | £126.7 | £155.5 | £190.9 | 77.7% | £83.5 |
| Zone 2 | £79.6 | £72.0 | £75.2 | £88.5 | £108.5 | £133.2 | 77.1% | £58.0 |
| Zone 3 | £58.0 | £54.2 | £56.7 | £66.8 | £81.9 | £100.5 | 77.3% | £43.8 |
| Zone 4 | £90.9 | £82.8 | £86.6 | £101.9 | £124.8 | £153.1 | 76.9% | £66.6 |
| Zone 5 | £68.4 | £61.8 | £64.4 | £74.7 | £91.2 | £111.7 | 73.6% | £47.4 |
| Zone 6 | £78.4 | £69.9 | £72.7 | £83.8 | £101.4 | £123.3 | 69.7% | £50.6 |
| Zone 7 | £279.1 | £248.1 | £258.1 | £297.6 | £359.9 | £437.6 | 69.5% | £179.5 |
| Zone 8 | £57.9 | £52.2 | £54.4 | £63.5 | £77.5 | £94.9 | 74.2% | £40.4 |
| **Study Area** | £929.8 | £841.0 | **£877.4** | **£1,023.7** | **£1,248.4** | **£1,526.6** | **74.0%** | **£649.3** |

Notes: Table 1 and Table 2

**TABLE 4: ALL COMPARISON GOODS - 2014 MARKET SHARE ANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 58.4% | 51.9% | 45.2% | 39.7% | 23.6% | 9.7% | 27.9% | 2.7% | 10.0% | 25.1% |
| | | | | | | | | | | |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| **ASHFORD DESIGNER OUTLET:** | 7.4% | 4.3% | 2.9% | 6.6% | 4.5% | 6.7% | 7.7% | 5.1% | 1.0% | 5.0% |
| | | | | | | | | | | |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 6.1% | 1.5% | 1.8% | 5.0% | 1.9% | 1.3% | 3.5% | 0.5% | 0.9% | 2.0% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.1% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.1% | 0.1% | 0.2% | 0.0% | 0.0% | 0.1% | 0.2% | 0.0% | 0.1% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 4.3% | 4.5% | 4.9% | 5.1% | 3.7% | 2.1% | 4.2% | 0.3% | 1.5% | 2.7% |
| Gallager Retail Park, Norman Road | 2.6% | 4.6% | 2.7% | 4.4% | 2.4% | 1.1% | 4.7% | 0.2% | 1.4% | 2.2% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 1.3% | 2.2% | 1.8% | 2.1% | 1.4% | 0.2% | 1.2% | 0.4% | 0.6% | 1.1% |
| Matalan, Brookefield Road | 0.3% | 0.0% | 0.3% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Orbital Trade Park, Ashford | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.4% | 0.9% | 0.2% | 0.2% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.2% |
| | | | | | | | | | | |
| Sainsbury's, Simone Weil Ave, Warren RP | 2.9% | 0.0% | 0.1% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.4% |
| ASDA, Kimberley Way | 0.1% | 0.5% | 0.0% | 0.2% | 0.0% | 0.8% | 0.8% | 0.0% | 0.2% | 0.2% |
| Tesco Extra, Kingsnorth | 1.1% | 2.5% | 0.0% | 1.5% | 0.4% | 0.0% | 0.1% | 0.2% | 0.1% | 0.6% |
| Tesco Extra, Hythe Road, Crooksfoot | 1.4% | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.2% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.7% | 0.4% | 0.8% | 5.0% | 21.3% | 3.5% | 0.3% | 0.1% | 0.0% | 2.9% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| **ASHFORD OTHER VILLAGES/STORES:** | 1.2% | 1.7% | 2.3% | 1.1% | 1.4% | 0.0% | 1.4% | 0.0% | 1.7% | 0.9% |
| | | | | | | | | | | |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 0.8% | 0.9% | 1.7% | 1.0% | 0.6% | 0.2% | 0.5% | 1.0% | 2.8% | 1.0% |
| CANTERBURY TOWN CENTRE: | 6.0% | 4.4% | 11.1% | 7.4% | 5.1% | 0.5% | 4.8% | 12.4% | 38.3% | 9.6% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 2.1% | 0.2% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.1% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 6.5% | 0.4% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 1.2% | 0.5% | 2.2% | 1.1% | 0.0% | 0.0% | 13.8% | 46.7% | 0.0% | 15.6% |
| FOLKESTON OUT OF CENTRE: | 0.3% | 1.0% | 0.1% | 0.1% | 0.2% | 0.0% | 0.1% | 5.1% | 0.0% | 1.7% |
| HASTINGS/ ST LEONARDS: | 0.1% | 0.0% | 0.0% | 0.0% | 1.2% | 24.6% | 0.2% | 0.0% | 0.0% | 1.9% |
| HYTHE: | 0.0% | 0.1% | 1.2% | 1.4% | 0.2% | 0.0% | 2.9% | 5.0% | 0.1% | 2.0% |
| LONDON: | 1.0% | 0.3% | 0.5% | 0.9% | 1.9% | 1.3% | 0.1% | 1.0% | 0.6% | 0.9% |
| MAIDSTONE TOWN CENTRE: | 0.7% | 2.5% | 1.6% | 0.2% | 8.9% | 0.0% | 1.4% | 0.5% | 20.1% | 2.9% |
| MAIDSTONE OUT OF CENTRE: | 0.2% | 0.6% | 0.3% | 0.2% | 0.1% | 0.0% | 0.4% | 0.6% | 0.0% | 0.4% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.7% | 0.0% | 0.0% | 0.0% | 0.6% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.5% | 1.5% | 15.9% | 0.2% | 0.0% | 0.2% | 1.3% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% |
| | | | | | | | | | | |
| **ALL OTHER SHOPS & STORES:** | 1.4% | 14.5% | 17.4% | 13.8% | 18.9% | 23.0% | 22.7% | 17.7% | 11.1% | 17.6% |
| | | | | | | | | | | |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| | | | | | | | | | | |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 11.9% | 24.7% | 36.6% | 26.7% | 38.8% | 74.4% | 47.4% | 90.3% | 82.0% | 56.1% |

**TABLE 5: ALL COMPARISON GOODS - 2015 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE(£m): | £101.9 | £107.4 | £75.2 | £56.7 | £86.6 | £64.4 | £72.7 | £258.1 | £54.4 | £877.4 |
| **ASHFORD TOWN CENTRE:** | £59.5 | £55.7 | £34.0 | £22.5 | £20.5 | £6.2 | £20.3 | £7.0 | £5.4 | £231.1 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £7.5 | £4.7 | £2.1 | £3.7 | £3.9 | £4.3 | £5.6 | £13.3 | £0.5 | £45.7 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £6.2 | £1.6 | £1.3 | £2.9 | £1.6 | £0.8 | £2.6 | £1.3 | £0.5 | £18.8 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.5 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.1 | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1 | £0.5 |
| Dobbies Garden World | £0.0 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 |
| Gallager Retail Park (B&Q) | £4.4 | £4.9 | £3.7 | £2.9 | £3.2 | £1.3 | £3.1 | £0.7 | £0.8 | £24.9 |
| Gallager Retail Park, Norman Road | £2.6 | £5.0 | £2.1 | £2.5 | £2.1 | £0.7 | £3.4 | £0.6 | £0.8 | £19.7 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £1.3 | £2.4 | £1.3 | £1.2 | £1.2 | £0.1 | £0.8 | £1.1 | £0.3 | £9.9 |
| Matalan, Brookefield Road | £0.3 | £0.0 | £0.2 | £0.2 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.8 |
| Orbital Trade Park, Ashford | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.2 |
| Warren Retail Park, Ashford | £0.4 | £1.0 | £0.1 | £0.1 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £1.7 |
| Sainsbury's, Simone Weil Ave, Warren RP | £2.9 | £0.0 | £0.1 | £0.5 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £3.7 |
| ASDA, Kimberley Way | £0.1 | £0.5 | £0.0 | £0.1 | £0.0 | £0.5 | £0.6 | £0.0 | £0.1 | £1.9 |
| Tesco Extra, Kingsnorth | £1.1 | £2.7 | £0.0 | £0.8 | £0.4 | £0.0 | £0.1 | £0.5 | £0.1 | £5.7 |
| Tesco Extra, Hythe Road, Crooksfoot | £1.4 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £1.8 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £0.7 | £0.4 | £0.6 | £2.8 | £18.4 | £2.3 | £0.2 | £0.3 | £0.0 | £25.7 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.2 | £1.8 | £1.7 | £0.6 | £1.2 | £0.0 | £1.0 | £0.1 | £0.9 | £8.6 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £0.8 | £1.0 | £1.3 | £0.5 | £0.5 | £0.1 | £0.3 | £2.7 | £1.5 | £8.8 |
| CANTERBURY TOWN CENTRE: | £6.2 | £4.7 | £8.4 | £4.2 | £4.4 | £0.3 | £3.5 | £32.0 | £20.9 | £84.6 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £1.1 | £1.6 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.1 | £0.3 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 | £0.3 | £0.0 | £0.6 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £3.5 | £3.7 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.2 | £0.6 | £1.7 | £0.6 | £0.0 | £0.0 | £10.0 | £120.5 | £0.0 | £134.5 |
| FOLKESTON OUT OF CENTRE: | £0.3 | £1.1 | £0.1 | £0.1 | £0.1 | £0.0 | £0.1 | £13.2 | £0.0 | £15.0 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.0 | £15.9 | £0.1 | £0.0 | £0.0 | £17.1 |
| HYTHE: | £0.0 | £0.1 | £0.9 | £0.8 | £0.2 | £0.0 | £2.1 | £13.0 | £0.0 | £17.0 |
| LONDON: | £1.0 | £0.3 | £0.4 | £0.5 | £1.7 | £0.8 | £0.1 | £2.7 | £0.3 | £7.8 |
| MAIDSTONE TOWN CENTRE: | £0.7 | £2.7 | £1.2 | £0.1 | £7.7 | £0.0 | £1.0 | £1.2 | £10.9 | £25.6 |
| MAIDSTONE OUT OF CENTRE: | £0.2 | £0.6 | £0.2 | £0.1 | £0.1 | £0.0 | £0.3 | £1.6 | £0.0 | £3.1 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £5.6 | £0.0 | £0.0 | £0.0 | £5.6 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.3 | £1.3 | £10.3 | £0.2 | £0.0 | £0.1 | £12.2 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| **ALL OTHER SHOPS & STORES:** | £1.5 | £15.5 | £13.1 | £7.9 | £16.3 | £14.8 | £16.5 | £45.6 | £6.0 | £137.2 |
| **TOTAL:** | **£101.9** | **£107.4** | **£75.2** | **£56.7** | **£86.6** | **£64.4** | **£72.7** | **£258.1** | **£54.4** | **£877.4** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £12.1 | £26.5 | £27.5 | £15.2 | £33.6 | £47.9 | £34.5 | £233.2 | £44.7 | £475.1 |

**TABLE 6: ALL COMPARISON GOODS - 2020 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE(£m): | £120.2 | £126.7 | £88.5 | £66.8 | £101.9 | £74.7 | £83.8 | £297.6 | £63.5 | £1,023.7 |
| **ASHFORD TOWN CENTRE:** | £70.2 | £65.7 | £40.0 | £26.5 | £24.1 | £7.2 | £23.4 | £8.1 | £6.3 | £271.5 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £8.9 | £5.5 | £2.5 | £4.4 | £4.6 | £5.0 | £6.5 | £15.3 | £0.6 | £53.3 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £7.3 | £1.9 | £1.6 | £3.4 | £1.9 | £1.0 | £3.0 | £1.5 | £0.6 | £22.0 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.6 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.1 | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1 | £0.6 |
| Dobbies Garden World | £0.0 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 |
| Gallager Retail Park (B&Q) | £5.2 | £5.7 | £4.4 | £3.4 | £3.8 | £1.6 | £3.5 | £0.8 | £1.0 | £29.3 |
| Gallager Retail Park, Norman Road | £3.1 | £5.9 | £2.4 | £3.0 | £2.4 | £0.8 | £3.9 | £0.7 | £0.9 | £23.1 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £1.6 | £2.8 | £1.6 | £1.4 | £1.4 | £0.2 | £1.0 | £1.3 | £0.4 | £11.6 |
| Matalan, Brookefield Road | £0.3 | £0.0 | £0.2 | £0.2 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £1.0 |
| Orbital Trade Park, Ashford | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.2 |
| Warren Retail Park, Ashford | £0.5 | £1.1 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £2.0 |
| Sainsbury's, Simone Weil Ave, Warren RP | £3.4 | £0.0 | £0.1 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £4.3 |
| ASDA, Kimberley Way | £0.1 | £0.6 | £0.0 | £0.1 | £0.0 | £0.6 | £0.7 | £0.0 | £0.1 | £2.3 |
| Tesco Extra, Kingsnorth | £1.4 | £3.2 | £0.0 | £1.0 | £0.4 | £0.0 | £0.1 | £0.6 | £0.1 | £6.7 |
| Tesco Extra, Hythe Road, Crooksfoot | £1.7 | £0.1 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £2.1 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £0.8 | £0.5 | £0.7 | £3.3 | £21.7 | £2.6 | £0.2 | £0.3 | £0.0 | £30.2 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.4 | £2.1 | £2.0 | £0.7 | £1.5 | £0.0 | £1.2 | £0.1 | £1.1 | £10.1 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.0 | £1.1 | £1.5 | £0.6 | £0.6 | £0.1 | £0.4 | £3.1 | £1.8 | £10.2 |
| CANTERBURY TOWN CENTRE: | £7.3 | £5.6 | £9.9 | £5.0 | £5.2 | £0.3 | £4.1 | £36.9 | £24.3 | £98.5 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £1.3 | £1.9 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.1 | £0.4 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 | £0.4 | £0.0 | £0.7 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £4.1 | £4.3 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.4 | £0.7 | £2.0 | £0.7 | £0.0 | £0.0 | £11.6 | £138.9 | £0.0 | £155.2 |
| FOLKESTON OUT OF CENTRE: | £0.3 | £1.3 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £15.2 | £0.0 | £17.3 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.2 | £18.4 | £0.1 | £0.0 | £0.0 | £19.8 |
| HYTHE: | £0.0 | £0.1 | £1.0 | £1.0 | £0.2 | £0.0 | £2.4 | £15.0 | £0.0 | £19.7 |
| LONDON: | £1.2 | £0.3 | £0.4 | £0.6 | £2.0 | £1.0 | £0.1 | £3.1 | £0.4 | £9.1 |
| MAIDSTONE TOWN CENTRE: | £0.9 | £3.2 | £1.4 | £0.2 | £9.0 | £0.0 | £1.2 | £1.3 | £12.8 | £30.0 |
| MAIDSTONE OUT OF CENTRE: | £0.2 | £0.7 | £0.3 | £0.1 | £0.1 | £0.0 | £0.4 | £1.9 | £0.0 | £3.6 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £6.5 | £0.0 | £0.0 | £0.0 | £6.5 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.3 | £1.5 | £11.9 | £0.2 | £0.0 | £0.1 | £14.2 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| **ALL OTHER SHOPS & STORES:** | £1.7 | £18.3 | £15.4 | £9.2 | £19.2 | £17.2 | £19.0 | £52.6 | £7.0 | £159.7 |
| **TOTAL:** | **£120.2** | **£126.7** | **£88.5** | **£66.8** | **£101.9** | **£74.7** | **£83.8** | **£297.6** | **£63.5** | **£1,023.7** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £14.3 | £31.2 | £32.4 | £17.9 | £39.6 | £55.6 | £39.7 | £268.9 | £52.1 | £551.6 |

**TABLE 7: ALL COMPARISON GOODS - 2025 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £147.7 | £155.5 | £108.5 | £81.9 | £124.8 | £91.2 | £101.4 | £359.9 | £77.5 | £1,248.4 |
| **ASHFORD TOWN CENTRE:** | £86.2 | £80.6 | £49.1 | £32.5 | £29.5 | £8.8 | £28.3 | £9.8 | £7.7 | £332.6 |
| **ASHFORD EDGE-OF-CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £10.9 | £6.8 | £3.1 | £5.4 | £5.6 | £6.1 | £7.8 | £18.5 | £0.8 | £64.9 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £8.9 | £2.3 | £1.9 | £4.1 | £2.4 | £1.2 | £3.6 | £1.8 | £0.7 | £26.9 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.7 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.1 | £0.2 | £0.0 | £0.0 | £0.1 | £0.2 | £0.0 | £0.1 | £0.7 |
| Dobbies Garden World | £0.0 | £0.0 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 |
| Gallager Retail Park (B&Q) | £6.4 | £7.0 | £5.4 | £4.2 | £4.6 | £1.9 | £4.3 | £0.9 | £1.2 | £35.8 |
| Gallager Retail Park, Norman Road | £3.8 | £7.2 | £3.0 | £3.6 | £3.0 | £1.0 | £4.8 | £0.9 | £1.1 | £28.3 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £1.9 | £3.5 | £1.9 | £1.7 | £1.8 | £0.2 | £1.2 | £1.5 | £0.5 | £14.2 |
| Matalan, Brookefield Road | £0.4 | £0.0 | £0.3 | £0.2 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £1.2 |
| Orbital Trade Park, Ashford | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.2 |
| Warren Retail Park, Ashford | £0.6 | £1.4 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £2.5 |
| Sainsbury's, Simone Weil Ave, Warren RP | £4.2 | £0.0 | £0.1 | £0.7 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £5.3 |
| ASDA, Kimberley Way | £0.2 | £0.8 | £0.0 | £0.1 | £0.0 | £0.7 | £0.8 | £0.0 | £0.1 | £2.8 |
| Tesco Extra, Kingsnorth | £1.7 | £3.9 | £0.0 | £1.2 | £0.5 | £0.0 | £0.1 | £0.7 | £0.1 | £8.3 |
| Tesco Extra, Hythe Road, Crooksfoot | £2.1 | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £2.6 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £1.0 | £0.6 | £0.9 | £4.1 | £26.5 | £3.2 | £0.3 | £0.4 | £0.0 | £37.0 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.7 | £2.6 | £2.5 | £0.9 | £1.8 | £0.0 | £1.4 | £0.1 | £1.3 | £12.3 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.2 | £1.4 | £1.9 | £0.8 | £0.7 | £0.1 | £0.5 | £3.7 | £2.1 | £12.5 |
| CANTERBURY TOWN CENTRE: | £8.9 | £6.8 | £12.1 | £6.1 | £6.3 | £0.4 | £4.9 | £44.7 | £29.7 | £120.0 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £1.6 | £2.3 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0 | £0.1 | £0.5 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 | £0.4 | £0.0 | £0.9 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £5.0 | £5.3 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.7 | £0.8 | £2.4 | £0.9 | £0.0 | £0.0 | £14.0 | £168.0 | £0.0 | £187.8 |
| FOLKESTON OUT OF CENTRE: | £0.4 | £1.6 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £18.4 | £0.0 | £20.9 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.5 | £22.5 | £0.2 | £0.0 | £0.0 | £24.2 |
| HYTHE: | £0.0 | £0.1 | £1.3 | £1.2 | £0.2 | £0.0 | £2.9 | £18.1 | £0.0 | £23.9 |
| LONDON: | £1.5 | £0.4 | £0.5 | £0.8 | £2.4 | £1.2 | £0.1 | £3.8 | £0.5 | £11.1 |
| MAIDSTONE TOWN CENTRE: | £1.1 | £3.9 | £1.7 | £0.2 | £11.1 | £0.0 | £1.4 | £1.6 | £15.6 | £36.6 |
| MAIDSTONE OUT OF CENTRE: | £0.3 | £0.9 | £0.3 | £0.1 | £0.1 | £0.0 | £0.4 | £2.3 | £0.0 | £4.4 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £7.9 | £0.0 | £0.0 | £0.0 | £7.9 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.4 | £1.9 | £14.5 | £0.2 | £0.0 | £0.1 | £17.3 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.3 |
| **ALL OTHER SHOPS & STORES:** | £2.1 | £22.5 | £18.9 | £11.3 | £23.6 | £21.0 | £23.0 | £63.6 | £8.6 | £194.6 |
| **TOTAL:** | **£147.7** | **£155.5** | **£108.5** | **£81.9** | **£124.8** | **£91.2** | **£101.4** | **£359.9** | **£77.5** | **£1,248.4** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £17.5 | £38.4 | £39.7 | £21.9 | £48.5 | £67.9 | £48.1 | £325.1 | £63.5 | £670.6 |

**TABLE 8: ALL COMPARISON GOODS - 2030 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £181.4 | £190.9 | £133.2 | £100.5 | £153.1 | £111.7 | £123.3 | £437.6 | £94.9 | £1,526.6 |
| **ASHFORD TOWN CENTRE:** | £105.9 | £99.0 | £60.2 | £39.9 | £36.2 | £10.8 | £34.4 | £11.9 | £9.5 | £407.8 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £13.4 | £8.3 | £3.8 | £6.6 | £6.8 | £7.5 | £9.5 | £22.5 | £0.9 | £79.4 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £11.0 | £2.8 | £2.4 | £5.1 | £2.9 | £1.5 | £4.4 | £2.2 | £0.8 | £33.0 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.8 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.2 | £0.0 | £0.1 | £0.9 |
| Dobbies Garden World | £0.0 | £0.0 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| Gallager Retail Park (B&Q) | £7.8 | £8.7 | £6.6 | £5.1 | £5.6 | £2.3 | £5.2 | £1.1 | £1.4 | £43.9 |
| Gallager Retail Park, Norman Road | £4.7 | £8.8 | £3.6 | £4.5 | £3.6 | £1.2 | £5.8 | £1.1 | £1.3 | £34.6 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| John Lewis at Home, Fougeres Way | £2.4 | £4.2 | £2.4 | £2.1 | £2.2 | £0.2 | £1.4 | £1.9 | £0.6 | £17.4 |
| Matalan, Brookefield Road | £0.5 | £0.0 | £0.4 | £0.3 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £1.4 |
| Orbital Trade Park, Ashford | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.3 |
| Warren Retail Park, Ashford | £0.8 | £1.7 | £0.2 | £0.3 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £3.1 |
| Sainsbury's, Simone Weil Ave, Warren RP | £5.2 | £0.0 | £0.2 | £0.9 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £6.5 |
| ASDA, Kimberley Way | £0.2 | £0.9 | £0.0 | £0.2 | £0.0 | £0.9 | £1.0 | £0.0 | £0.2 | £3.4 |
| Tesco Extra, Kingsnorth | £2.0 | £4.8 | £0.0 | £1.5 | £0.6 | £0.0 | £0.2 | £0.8 | £0.1 | £10.1 |
| Tesco Extra, Hythe Road, Crooksfoot | £2.5 | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £3.2 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £1.2 | £0.7 | £1.1 | £5.0 | £32.5 | £4.0 | £0.4 | £0.4 | £0.0 | £45.3 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 |
| **ASHFORD OTHER VILLAGES/STORES:** | £2.1 | £3.2 | £3.0 | £1.1 | £2.2 | £0.0 | £1.7 | £0.1 | £1.6 | £15.1 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.5 | £1.7 | £2.3 | £1.0 | £0.9 | £0.2 | £0.6 | £4.5 | £2.6 | £15.3 |
| CANTERBURY TOWN CENTRE: | £11.0 | £8.4 | £14.8 | £7.5 | £7.8 | £0.5 | £6.0 | £54.3 | £36.4 | £146.6 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.7 | £2.0 | £2.8 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £0.0 | £0.0 | £0.0 | £0.1 | £0.6 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.2 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.3 | £0.5 | £0.0 | £1.1 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £6.2 | £6.5 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £2.1 | £1.0 | £3.0 | £1.1 | £0.0 | £0.0 | £17.0 | £204.3 | £0.0 | £228.4 |
| FOLKESTON OUT OF CENTRE: | £0.5 | £1.9 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £22.4 | £0.0 | £25.5 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.8 | £27.5 | £0.2 | £0.0 | £0.0 | £29.7 |
| HYTHE: | £0.1 | £0.1 | £1.6 | £1.5 | £0.3 | £0.0 | £3.5 | £22.0 | £0.1 | £29.1 |
| LONDON: | £1.8 | £0.5 | £0.7 | £0.9 | £3.0 | £1.4 | £0.1 | £4.6 | £0.6 | £13.6 |
| MAIDSTONE TOWN CENTRE: | £1.3 | £4.8 | £2.1 | £0.2 | £13.6 | £0.0 | £1.7 | £2.0 | £19.1 | £44.9 |
| MAIDSTONE OUT OF CENTRE: | £0.3 | £1.1 | £0.4 | £0.2 | £0.1 | £0.0 | £0.5 | £2.7 | £0.0 | £5.4 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £9.7 | £0.0 | £0.0 | £0.0 | £9.7 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.5 | £2.3 | £17.8 | £0.3 | £0.0 | £0.2 | £21.2 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.3 |
| **ALL OTHER SHOPS & STORES:** | £2.6 | £27.6 | £23.2 | £13.9 | £28.9 | £25.7 | £28.0 | £77.3 | £10.5 | £237.7 |
| **TOTAL:** | **£181.4** | **£190.9** | **£133.2** | **£100.5** | **£153.1** | **£111.7** | **£123.3** | **£437.6** | **£94.9** | **£1,526.6** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £21.5 | £47.1 | £48.8 | £26.9 | £59.5 | £83.2 | £58.5 | £395.3 | £77.8 | £818.5 |

**TABLE 9: ESTIMATED 'INFLOW' (TRADE DRAW) FROM OUTSIDE STUDY AREA & TOTAL FORECAST TURNOVERS**

| | Estimated 'Inflow' from Outside Study Area | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| **Main Town Centres:** | | **£270.6** | **£317.9** | **£389.5** | **£477.5** |
| *Ashford Town Centre* | 5% | £243.3 | £285.8 | £350.1 | £429.2 |
| *Tenterden own Centre* | 5% | £27.4 | £32.2 | £39.4 | £48.3 |
| **Other Villages/ shops in Ashford Borough:** | **0%** | **£8.6** | **£10.1** | **£12.3** | **£15.1** |
| **Out of Centre:** | **0%** | **£206.9** | **£242.0** | **£295.6** | **£361.7** |
| *Ashford Designer Outlet* | 60% | £114.2 | £133.1 | £162.3 | £198.5 |
| *Other edge and out of centre stores* | 2% | £92.8 | £108.8 | £133.2 | £163.3 |
| **ASHFORD BOROUGH - TOTAL:** | | **£486.2** | **£570.0** | **£697.3** | **£854.4** |

Notes: 'Inflow' (trade draw) represents the potential expenditure from commuters, tourists and visitors to the Borough's main centres, shops and stores who live outside the defined study area (i.e. beyond Zones 1-8).

**TABLE 10: NEW RETAIL COMMITMENTS - ESTIMATED COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVERS**

| | | LPA Planning Ref | Estimated Sales Area ($m^2$ net) | Average Sales (£ per $m^2$) | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|---|---|---|
| Land at junction of Dover Place and, Station Road | ATC - Edge of Centre | 11/00382/AS | 446 | £4,500 | £2.0 | £2.2 | £2.5 | £2.8 |
| Tesco Stores Ltd, Smallhythe Road | TTC - Edge of Centre | 10/01036/AS | 363 | £4,500 | £1.6 | £1.8 | £2.0 | £2.2 |
| The Panorama, Park Street, Ashford | Out of Centre | 08/00396/AS | 836 | £4,500 | £3.8 | £4.2 | £4.6 | £5.2 |
| Homebase, Unit 2, Ashford Business Park, Barrey Road | Out of Centre | 13/00631/AS | 326 | £2,250 | £0.7 | £0.8 | £0.9 | £1.0 |
| Unit 8, Warren Retail Park, Simone Weil Avenue | Out of Centre | 11/00689/AS | 326 | £2,250 | £0.7 | £0.8 | £0.9 | £1.0 |
| Unit B, Beaver Industrial Estate, Beaver Road | Out of Centre | 12/01295/AS | 3,121 | £2,250 - £4500 | £10.8 | £11.9 | £13.2 | £14.8 |
| Precinct 13, Ashford Road | Out of Centre | 13/00427/AS | 123 | £4,000 | £0.5 | £0.5 | £0.6 | £0.7 |
| Foodstore, Cheeseman's Green (Finberry) | Planned Local Centre | 02/00278/AS | 735 | £5,500 | £4.0 | £4.5 | £5.0 | £5.6 |
| Foodstore, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 651 | £5,500 | £3.6 | £4.0 | £4.4 | £4.9 |
| Retail units, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 965 | £4,000 | £3.9 | £4.3 | £4.8 | £5.3 |
| Retail units, Chilmington Green (Local Centre) | Planned Local Centre | 12/00400/AS | 179 | £4,000 | £0.7 | £0.8 | £0.9 | £1.0 |
| **TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPACE (£m):** | | | | | **£32.3** | **£35.8** | **£39.8** | **£44.4** |

Notes: Net floor areas based on 70% of gross floor area for each committed scheme as identified by Ashford Borough Council or from planning application documents.

Net sales densities are based on information from the corresponding planning application or based average sales density for similar type schemes.

Annual productivitiy growth identified in Tables 4a and 4b, Retail Planner Briefing Note 12.1: Addendum (October 2014) is applied to identify forecast turnover ranging from 2% to 3.8%.

**TABLE 10A: 'KEY COMPARISON RETAIL PROPOSALS - ESTIMATED COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVER**

| | LPA Planning Ref | Estimated Sales Area ($m^2$ net) | Average Sales (£ per $m^2$) | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|---|---|
| Designer Outlet Extension | 14/1402 | 6,665 | £6,211 | £41.4 | £45.8 | £51.0 | £56.9 |
| Turnover from the Study Area @ 40% | | | | £16.6 | £18.3 | £20.4 | £22.75 |
| **TOTAL TURNOVER OF PROPOSED COMPARISON RETAIL FLOORSPACE (£m):** | | | | **£16.6** | **£18.3** | **£20.4** | **£22.7** |

Notes: Sales density is identified at £7,040 per $ft^2$ in 2014 based on existing sales density identified for existing floorspace and uplifted by 10% to take account of higher quality retailers intended for the extended floorspace as stated in paragraph 7.13 of the Retail Impact Assessment (RIA) prepared by Dr. Richard Doidge.

Net sale floorspace (7,057m2) estimated at 85% of gross floorspace, which is based on the gross to net guide stated in Footnote (1) page 53 of the RIA. Therefore, we have applied the same ratio to gross sales density to identify net sales density.

Annual productivitiy growth identified by Experian Business Strategies is applied to identify forecast turnover ranging from 2% to 3.8%.

**TABLE 11: ASHFORD BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £486.2 | £570.0 | £697.3 | £854.4 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m)[1]: | £486.2 | £538.3 | £599.0 | £667.9 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £31.7 | £98.3 | £186.5 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | - | £35.8 | £39.8 | £44.4 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£4.1** | **£58.5** | **£142.1** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **-676** | **8,631** | **18,807** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -965 | 12,330 | 26,867 |

**TABLE 12: ASHFORD TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £243.3 | £285.8 | £350.1 | £429.2 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £243.3 | £269.4 | £299.7 | £334.2 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | | £16.4 | £50.3 | £95.0 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £2.2 | £2.5 | £2.8 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£14.2** | **£47.8** | **£92.3** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **2,329** | **7,060** | **12,213** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 3,327 | 10,085 | 17,446 |

**TABLE 13: TENTERDEN TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £27.4 | £32.2 | £39.4 | £48.3 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £27.4 | £30.3 | £33.7 | £37.6 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £1.9 | £5.7 | £10.7 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £1.8 | £2.0 | £2.2 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£0.1** | **£3.7** | **£8.5** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **9** | **541** | **1,122** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 12 | 774 | 1,603 |

**TABLE 14: OTHER LOCAL CENTRE AND VILLAGES - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £8.6 | £10.1 | £12.3 | £15.1 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £8.6 | £9.5 | £10.6 | £11.8 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £0.6 | £1.8 | £3.3 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £0.0 | £0.0 | £0.0 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£0.6** | **£1.8** | **£3.3** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **93** | **259** | **440** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 133 | 370 | 628 |

**TABLE 15: REST OF BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £206.9 | £242.0 | £295.6 | £361.7 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £206.9 | £229.2 | £255.0 | £284.3 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | | £12.8 | £40.6 | £77.4 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £31.7 | £35.3 | £39.4 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£18.9** | **£5.2** | **£38.0** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **-3,107** | **771** | **5,032** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -4,438 | 1,102 | 7,189 |

**TABLE 16: ASHFORD TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT - IMPROVED MARKET SHARE (+10%)**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| | **CURRENT RETENTION FROM ZONES 1-4:** **44.9%** | | | | |
| | **IMPROVED RETENTION FROM ZONES 1-4:** **54.9%** | | | | |
| STEP 1: | REVISED TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £288.3 | £338.8 | £415.0 | £508.8 |
| STEP 2: | REVISED TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £288.3 | £319.2 | £355.2 | £396.1 |
| STEP 3: | REVISED NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £19.5 | £59.7 | £112.8 |
| STEP 4: | REVISED COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | £3.6 | £4.0 | £4.5 | £5.0 |
| STEP 5: | **REVISED NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **£15.5** | **£55.3** | **£107.8** |
| STEP 6: | **REVISED FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **2,545** | **8,155** | **14,264** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 3,636 | 11,650 | 20,378 |

# APPENDIX 8B: COMPARISON CAPACITY ASSESSMENT – POPULATION SENSITIVITY TEST

## COMPARISON GOODS FLOORSPACE CAPACITY ASSESSMENT SCENARIO - POPULATION SENSITIVITY TESTING

**TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)**

| ZONE: | 2011 | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: % | GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | 36,452 | 34,760 | 35,139 | 37,032 | 38,818 | 40,391 | 14.9% | 5,252 |
| Zone 1b | 38,091 | 39,665 | 40,089 | 42,218 | 44,227 | 45,990 | 14.7% | 5,901 |
| Zone 2 | 17,612 | 18,100 | 18,282 | 19,207 | 20,103 | 20,900 | 14.3% | 2,618 |
| Zone 3 | 13,463 | 14,303 | 14,453 | 15,204 | 15,917 | 16,543 | 14.5% | 2,090 |
| Zone 4 | 21,655 | 22,412 | 22,641 | 23,796 | 24,885 | 25,853 | 14.2% | 3,212 |
| Zone 5 | 16,453 | 16,895 | 16,995 | 17,625 | 18,359 | 19,046 | 12.1% | 2,051 |
| Zone 6 | 22,027 | 22,315 | 22,432 | 23,089 | 23,847 | 24,567 | 9.5% | 2,135 |
| Zone 7 | 82,789 | 83,630 | 84,070 | 86,567 | 89,335 | 92,006 | 9.4% | 7,936 |
| Zone 8 | 14,238 | 14,570 | 14,691 | 15,304 | 15,931 | 16,525 | 12.5% | 1,834 |
| **Study Area** | 259,466 | 266,650 | **268,792** | **280,042** | **291,422** | **301,821** | **12.3%** | **33,029** |

Source: The base year (2015) population and projections to 2030 have been sourced directly from Experian's latest*'Retail Area Planner'* Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

**TABLE 1B: POPULATION SCENARIO TEST- 10% UPLIFT ZONES 1-4: BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)**

| ZONE: | 2014 | 2015 | 2020 | 2025 | 2030 | % | 2015-30 |
|---|---|---|---|---|---|---|---|
| Zone 1a | 38,236 | 38,653 | 40,735 | 42,700 | 44,430 | 14.9% | 5,777 |
| Zone 1b | 43,632 | 44,098 | 46,440 | 48,650 | 50,589 | 14.7% | 6,491 |
| Zone 2 | 19,910 | 20,110 | 21,128 | 22,113 | 22,990 | 14.3% | 2,880 |
| Zone 3 | 15,733 | 15,898 | 16,724 | 17,509 | 18,197 | 14.5% | 2,299 |
| Zone 4 | 24,653 | 24,905 | 26,176 | 27,374 | 28,438 | 14.2% | 3,533 |
| Zone 5 | 16,895 | 18,695 | 19,388 | 20,195 | 20,951 | 12.1% | 2,256 |
| Zone 6 | 22,315 | 24,675 | 25,398 | 26,232 | 27,024 | 9.5% | 2,349 |
| Zone 7 | 83,630 | 92,477 | 95,224 | 98,269 | 101,207 | 9.4% | 8,730 |
| Zone 8 | 14,570 | 16,160 | 16,834 | 17,524 | 18,178 | 12.5% | 2,017 |
| **Study Area** | 266,650 | **295,671** | **308,046** | **320,564** | **332,003** | **12.3%** | **36,332** |

Source: The population scenorio test assumes a higher population growth than the ONS based projections for Zones 1 to 4, which correspond to the Ashford Borough area. The above table applies a 10% uplift on the ONS 2012-based Sub National Population Projections for 2014, 2015, 2020, 2025, and 2030.

**TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | % GROWTH: 2015-30 |
|---|---|---|---|---|---|---|---|
| **EXPERIAN - SPECIAL FORMS OF TRADING (%):** | | **11.7%** | **12.5%** | **15.7%** | **15.9%** | **15.6%** | 24.8% |
| **REVISED SPECIAL FORMS OF TRADING (%):** | | **12.0%** | **12.8%** | **16.1%** | **16.3%** | **16.0%** | 25.3% |
| Zone 1a | £3,183 | £2,801 | £2,899 | £3,246 | £3,804 | £4,491 | 54.9% |
| Zone 1b | £2,942 | £2,589 | £2,680 | £3,001 | £3,516 | £4,151 | 54.9% |
| Zone 2 | £4,517 | £3,975 | £4,114 | £4,607 | £5,398 | £6,373 | 54.9% |
| Zone 3 | £4,307 | £3,791 | £3,923 | £4,392 | £5,147 | £6,077 | 54.9% |
| Zone 4 | £4,198 | £3,694 | £3,823 | £4,281 | £5,017 | £5,923 | 54.9% |
| Zone 5 | £4,158 | £3,659 | £3,787 | £4,241 | £4,969 | £5,866 | 54.9% |
| Zone 6 | £3,558 | £3,131 | £3,241 | £3,629 | £4,252 | £5,020 | 54.9% |
| Zone 7 | £3,371 | £2,967 | £3,070 | £3,438 | £4,029 | £4,756 | 54.9% |
| Zone 8 | £4,068 | £3,580 | £3,705 | £4,149 | £4,862 | £5,740 | 54.9% |
| **Study Area** | £3,811 | £3,354 | **£3,471** | **£3,887** | **£4,555** | **£5,377** | **54.9%** |

Source: Average spend per capita estimates (2013 prices) are derived from Experian*'Retail Area Planner' Reports* using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 12.1 published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on and over forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 12.1.

**TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2014 - 2030 (£m)**

| ZONE: | 2014 (incl SFT) | 2014 | 2015 | 2020 | 2025 | 2030 | GROWTH: 2015-30 % | GROWTH: 2015-30 £m |
|---|---|---|---|---|---|---|---|---|
| Zone 1a | £121.7 | £107.1 | £112.1 | £132.2 | £162.4 | £199.5 | 78.1% | £87.5 |
| Zone 1b | £128.4 | £113.0 | £118.2 | £139.3 | £171.1 | £210.0 | 77.7% | £91.8 |
| Zone 2 | £89.9 | £79.1 | £82.7 | £97.3 | £119.4 | £146.5 | 77.1% | £63.8 |
| Zone 3 | £67.8 | £59.6 | £62.4 | £73.5 | £90.1 | £110.6 | 77.3% | £48.2 |
| Zone 4 | £103.5 | £91.1 | £95.2 | £112.1 | £137.3 | £168.4 | 76.9% | £73.2 |
| Zone 5 | £70.2 | £61.8 | £70.8 | £82.2 | £100.4 | £122.9 | 73.6% | £52.1 |
| Zone 6 | £79.4 | £69.9 | £80.0 | £92.2 | £111.5 | £135.7 | 69.7% | £55.7 |
| Zone 7 | £281.9 | £248.1 | £283.9 | £327.4 | £395.9 | £481.4 | 69.5% | £197.4 |
| Zone 8 | £59.3 | £52.2 | £59.9 | £69.8 | £85.2 | £104.3 | 74.2% | £44.5 |
| **Study Area** | £1,002.1 | £881.9 | **£965.1** | **£1,126.0** | **£1,373.3** | **£1,679.3** | **74.0%** | **£714.2** |

Notes: Table 1 and Table 2

**TABLE 4: ALL COMPARISON GOODS - 2014 MARKET SHAREANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| **ASHFORD TOWN CENTRE:** | 58.4% | 51.9% | 45.2% | 39.7% | 23.6% | 9.7% | 27.9% | 2.7% | 10.0% | 25.1% |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| New Street Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD DESIGNER OUTLET:** | 7.4% | 4.3% | 2.9% | 6.6% | 4.5% | 6.7% | 7.7% | 5.1% | 1.0% | 5.0% |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | 6.1% | 1.5% | 1.8% | 5.0% | 1.9% | 1.3% | 3.5% | 0.5% | 0.9% | 2.0% |
| Carpetright, Hall Avenue | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.1% |
| Brunswick Industrial Estate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bybrook Barn Garden Centre, Canterbury Rd | 0.1% | 0.1% | 0.2% | 0.0% | 0.0% | 0.1% | 0.2% | 0.0% | 0.1% | 0.1% |
| Dobbies Garden World | 0.0% | 0.0% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Evegate Retail Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% |
| Gallager Retail Park (B&Q) | 4.3% | 4.5% | 4.9% | 5.1% | 3.7% | 2.1% | 4.2% | 0.3% | 1.5% | 2.7% |
| Gallager Retail Park, Norman Road | 2.6% | 4.6% | 2.7% | 4.4% | 2.4% | 1.1% | 4.7% | 0.2% | 1.4% | 2.2% |
| Howdens, Cobbswood Industrial Estate | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| John Lewis at Home, Fougeres Way | 1.3% | 2.2% | 1.8% | 2.1% | 1.4% | 0.2% | 1.2% | 0.4% | 0.6% | 1.1% |
| Matalan, Brookefield Road | 0.3% | 0.0% | 0.3% | 0.3% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% |
| Orbital Trade Park, Ashford | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% |
| Warren Retail Park, Ashford | 0.4% | 0.9% | 0.2% | 0.2% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.2% |
| Sainsbury's, Simone Weil Ave, Warren RP | 2.9% | 0.0% | 0.1% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.4% |
| ASDA, Kimberley Way | 0.1% | 0.5% | 0.0% | 0.2% | 0.0% | 0.8% | 0.8% | 0.0% | 0.2% | 0.2% |
| Tesco Extra, Kingsnorth | 1.1% | 2.5% | 0.0% | 1.5% | 0.4% | 0.0% | 0.1% | 0.2% | 0.1% | 0.6% |
| Tesco Extra, Hythe Road, Crooksfoot | 1.4% | 0.1% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.2% |
| Waitrose, Repton Park | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Extra, Willesborough | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco Express, Mace Lane | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Tesco, Grovewood Drive North, Weavering | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | 0.7% | 0.4% | 0.8% | 5.0% | 21.3% | 3.5% | 0.3% | 0.1% | 0.0% | 2.9% |
| Tesco, Smallhythe Road | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ASHFORD OTHER VILLAGES/STORES:** | 1.2% | 1.7% | 2.3% | 1.1% | 1.4% | 0.0% | 1.4% | 0.0% | 1.7% | 0.9% |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | 0.8% | 0.9% | 1.7% | 1.0% | 0.6% | 0.2% | 0.5% | 1.0% | 2.8% | 1.0% |
| CANTERBURY TOWN CENTRE: | 6.0% | 4.4% | 11.1% | 7.4% | 5.1% | 0.5% | 4.8% | 12.4% | 38.3% | 9.6% |
| CANTERBURY OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 2.1% | 0.2% |
| CHATHAM TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| CHATHAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.0% |
| DOVER TOWN CENTRE: | 0.0% | 0.0% | 0.2% | 0.0% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.1% |
| DOVER OUT OF CENTRE | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FAVERSHAM TOWN CENTRE: | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 6.5% | 0.4% |
| FAVERHSAM OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FOLKESTONE TOWN CENTRE: | 1.2% | 0.5% | 2.2% | 1.1% | 0.0% | 0.0% | 13.8% | 46.7% | 0.0% | 15.6% |
| FOLKESTON OUT OF CENTRE: | 0.3% | 1.0% | 0.1% | 0.1% | 0.2% | 0.0% | 0.1% | 5.1% | 0.0% | 1.7% |
| HASTINGS/ ST LEONARDS: | 0.1% | 0.0% | 0.0% | 0.0% | 1.2% | 24.6% | 0.2% | 0.0% | 0.0% | 1.9% |
| HYTHE: | 0.0% | 0.1% | 1.2% | 1.4% | 0.2% | 0.0% | 2.9% | 5.0% | 0.1% | 2.0% |
| LONDON: | 1.0% | 0.3% | 0.5% | 0.9% | 1.9% | 1.3% | 0.1% | 1.0% | 0.6% | 0.9% |
| MAIDSTONE TOWN CENTRE: | 0.7% | 2.5% | 1.6% | 0.2% | 8.9% | 0.0% | 1.4% | 0.5% | 20.1% | 2.9% |
| MAIDSTONE OUT OF CENTRE: | 0.2% | 0.6% | 0.3% | 0.2% | 0.1% | 0.0% | 0.4% | 0.6% | 0.0% | 0.4% |
| RYE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 8.7% | 0.0% | 0.0% | 0.0% | 0.6% |
| TUNBRIDGE WELLS TOWN CENTRE: | 0.0% | 0.0% | 0.0% | 0.5% | 1.5% | 15.9% | 0.2% | 0.0% | 0.2% | 1.3% |
| TUNBRIDGE WELLS OUT OF CENTRE: | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% |
| **ALL OTHER SHOPS & STORES:** | 1.4% | 14.5% | 17.4% | 13.8% | 18.9% | 23.0% | 22.7% | 17.7% | 11.1% | 17.6% |
| **TOTAL:** | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | 11.9% | 24.7% | 36.6% | 26.7% | 38.8% | 74.4% | 47.4% | 90.3% | 82.0% | 56.1% |

**TABLE 5: ALL COMPARISON GOODS - 2015 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE(£m): | £112.1 | £118.2 | £82.7 | £62.4 | £95.2 | £70.8 | £80.0 | £283.9 | £59.9 | £965.1 |
| **ASHFORD TOWN CENTRE:** | £65.4 | £61.3 | £37.4 | £24.8 | £22.5 | £6.8 | £22.3 | £7.7 | £6.0 | £254.2 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £8.3 | £5.1 | £2.4 | £4.1 | £4.3 | £4.7 | £6.2 | £14.6 | £0.6 | £50.2 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £6.8 | £1.7 | £1.5 | £3.1 | £1.8 | £0.9 | £2.8 | £1.4 | £0.5 | £20.7 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.5 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.1 | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1 | £0.6 |
| Dobbies Garden World | £0.0 | £0.0 | £0.2 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 |
| Gallager Retail Park (B&Q) | £4.8 | £5.4 | £4.1 | £3.2 | £3.5 | £1.5 | £3.4 | £0.7 | £0.9 | £27.4 |
| Gallager Retail Park, Norman Road | £2.9 | £5.5 | £2.3 | £2.8 | £2.3 | £0.7 | £3.8 | £0.7 | £0.8 | £21.7 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £1.5 | £2.6 | £1.5 | £1.3 | £1.3 | £0.2 | £0.9 | £1.2 | £0.4 | £10.9 |
| Matalan, Brookefield Road | £0.3 | £0.0 | £0.2 | £0.2 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.9 |
| Orbital Trade Park, Ashford | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.2 |
| Warren Retail Park, Ashford | £0.5 | £1.1 | £0.1 | £0.2 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £1.9 |
| Sainsbury's, Simone Weil Ave, Warren RP | £3.2 | £0.0 | £0.1 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £4.0 |
| ASDA, Kimberley Way | £0.1 | £0.6 | £0.0 | £0.1 | £0.0 | £0.6 | £0.7 | £0.0 | £0.1 | £2.1 |
| Tesco Extra, Kingsnorth | £1.3 | £3.0 | £0.0 | £0.9 | £0.4 | £0.0 | £0.1 | £0.5 | £0.1 | £6.3 |
| Tesco Extra, Hythe Road, Crooksfoot | £1.6 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £2.0 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £0.7 | £0.4 | £0.7 | £3.1 | £20.2 | £2.5 | £0.2 | £0.3 | £0.0 | £28.3 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.3 | £2.0 | £1.9 | £0.7 | £1.4 | £0.0 | £1.1 | £0.1 | £1.0 | £9.4 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £0.9 | £1.0 | £1.4 | £0.6 | £0.6 | £0.1 | £0.4 | £2.9 | £1.7 | £9.6 |
| CANTERBURY TOWN CENTRE: | £6.8 | £5.2 | £9.2 | £4.6 | £4.8 | £0.3 | £3.9 | £35.2 | £23.0 | £93.1 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £1.3 | £1.8 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.1 | £0.4 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 | £0.3 | £0.0 | £0.7 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £3.9 | £4.1 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.3 | £0.6 | £1.9 | £0.7 | £0.0 | £0.0 | £11.0 | £132.5 | £0.0 | £148.0 |
| FOLKESTON OUT OF CENTRE: | £0.3 | £1.2 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £14.5 | £0.0 | £16.5 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.1 | £17.4 | £0.1 | £0.0 | £0.0 | £18.8 |
| HYTHE: | £0.0 | £0.1 | £1.0 | £0.9 | £0.2 | £0.0 | £2.3 | £14.3 | £0.0 | £18.8 |
| LONDON: | £1.1 | £0.3 | £0.4 | £0.6 | £1.8 | £0.9 | £0.1 | £3.0 | £0.4 | £8.6 |
| MAIDSTONE TOWN CENTRE: | £0.8 | £3.0 | £1.3 | £0.2 | £8.5 | £0.0 | £1.1 | £1.3 | £12.0 | £28.2 |
| MAIDSTONE OUT OF CENTRE: | £0.2 | £0.7 | £0.3 | £0.1 | £0.1 | £0.0 | £0.3 | £1.8 | £0.0 | £3.4 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £6.1 | £0.0 | £0.0 | £0.0 | £6.2 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.3 | £1.4 | £11.3 | £0.2 | £0.0 | £0.1 | £13.4 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| **ALL OTHER SHOPS & STORES:** | £1.6 | £17.1 | £14.4 | £8.6 | £18.0 | £16.3 | £18.1 | £50.1 | £6.6 | £150.9 |
| **TOTAL:** | **£112.1** | **£118.2** | **£82.7** | **£62.4** | **£95.2** | **£70.8** | **£80.0** | **£283.9** | **£59.9** | **£965.1** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £13.3 | £29.1 | £30.3 | £16.7 | £37.0 | £52.7 | £37.9 | £256.5 | £49.1 | £522.6 |

**TABLE 6: ALL COMPARISON GOODS - 2020 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE(£m): | £132.2 | £139.3 | £97.3 | £73.5 | £112.1 | £82.2 | £92.2 | £327.4 | £69.8 | £1,126.0 |
| **ASHFORD TOWN CENTRE:** | £77.2 | £72.3 | £44.0 | £29.2 | £26.5 | £7.9 | £25.7 | £8.9 | £7.0 | £298.6 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £9.8 | £6.1 | £2.8 | £4.9 | £5.0 | £5.5 | £7.1 | £16.8 | £0.7 | £58.6 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £8.0 | £2.1 | £1.7 | £3.7 | £2.1 | £1.1 | £3.3 | £1.6 | £0.6 | £24.2 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.6 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.1 | £0.1 | £0.0 | £0.0 | £0.1 | £0.1 | £0.0 | £0.1 | £0.6 |
| Dobbies Garden World | £0.0 | £0.0 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 |
| Gallager Retail Park (B&Q) | £5.7 | £6.3 | £4.8 | £3.8 | £4.1 | £1.7 | £3.9 | £0.8 | £1.1 | £32.2 |
| Gallager Retail Park, Norman Road | £3.4 | £6.4 | £2.7 | £3.3 | £2.7 | £0.9 | £4.3 | £0.8 | £1.0 | £25.4 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £1.7 | £3.1 | £1.7 | £1.6 | £1.6 | £0.2 | £1.1 | £1.4 | £0.4 | £12.8 |
| Matalan, Brookefield Road | £0.4 | £0.0 | £0.3 | £0.2 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £1.1 |
| Orbital Trade Park, Ashford | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.2 |
| Warren Retail Park, Ashford | £0.6 | £1.3 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £2.2 |
| Sainsbury's, Simone Weil Ave, Warren RP | £3.8 | £0.0 | £0.1 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £4.8 |
| ASDA, Kimberley Way | £0.1 | £0.7 | £0.0 | £0.1 | £0.0 | £0.7 | £0.8 | £0.0 | £0.1 | £2.5 |
| Tesco Extra, Kingsnorth | £1.5 | £3.5 | £0.0 | £1.1 | £0.5 | £0.0 | £0.1 | £0.6 | £0.1 | £7.4 |
| Tesco Extra, Hythe Road, Crooksfoot | £1.9 | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £2.3 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £0.9 | £0.5 | £0.8 | £3.7 | £23.8 | £2.9 | £0.3 | £0.3 | £0.0 | £33.2 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.6 | £2.3 | £2.2 | £0.8 | £1.6 | £0.0 | £1.3 | £0.1 | £1.2 | £11.1 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.1 | £1.2 | £1.7 | £0.7 | £0.7 | £0.1 | £0.4 | £3.4 | £1.9 | £11.2 |
| CANTERBURY TOWN CENTRE: | £8.0 | £6.1 | £10.8 | £5.5 | £5.7 | £0.4 | £4.5 | £40.6 | £26.8 | £108.4 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £1.5 | £2.1 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0 | £0.1 | £0.4 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.1 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 | £0.4 | £0.0 | £0.8 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £4.5 | £4.8 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.5 | £0.7 | £2.2 | £0.8 | £0.0 | £0.0 | £12.7 | £152.8 | £0.0 | £170.7 |
| FOLKESTON OUT OF CENTRE: | £0.4 | £1.4 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £16.7 | £0.0 | £19.0 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.3 | £20.3 | £0.2 | £0.0 | £0.0 | £21.8 |
| HYTHE: | £0.0 | £0.1 | £1.1 | £1.1 | £0.2 | £0.0 | £2.6 | £16.5 | £0.0 | £21.7 |
| LONDON: | £1.3 | £0.4 | £0.5 | £0.7 | £2.2 | £1.0 | £0.1 | £3.4 | £0.4 | £10.1 |
| MAIDSTONE TOWN CENTRE: | £1.0 | £3.5 | £1.5 | £0.2 | £10.0 | £0.0 | £1.3 | £1.5 | £14.0 | £33.0 |
| MAIDSTONE OUT OF CENTRE: | £0.3 | £0.8 | £0.3 | £0.1 | £0.1 | £0.0 | £0.4 | £2.1 | £0.0 | £4.0 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £7.1 | £0.0 | £0.0 | £0.0 | £7.1 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.4 | £1.7 | £13.1 | £0.2 | £0.0 | £0.1 | £15.6 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| **ALL OTHER SHOPS & STORES:** | £1.9 | £20.1 | £17.0 | £10.2 | £21.2 | £18.9 | £20.9 | £57.8 | £7.7 | £175.7 |
| **TOTAL:** | **£132.2** | **£139.3** | **£97.3** | **£73.5** | **£112.1** | **£82.2** | **£92.2** | **£327.4** | **£69.8** | **£1,126.0** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £15.7 | £34.4 | £35.6 | £19.6 | £43.5 | £61.2 | £43.7 | £295.8 | £57.3 | £606.8 |

**TABLE 7: ALL COMPARISON GOODS - 2025 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £162.4 | £171.1 | £119.4 | £90.1 | £137.3 | £100.4 | £111.5 | £395.9 | £85.2 | £1,373.3 |
| **ASHFORD TOWN CENTRE:** | £94.8 | £88.7 | £54.0 | £35.8 | £32.5 | £9.7 | £31.1 | £10.7 | £8.5 | £365.8 |
| **ASHFORD EDGE-OF-CENTRE:** | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £12.0 | £7.4 | £3.4 | £6.0 | £6.1 | £6.7 | £8.6 | £20.3 | £0.9 | £71.4 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £9.8 | £2.5 | £2.1 | £4.5 | £2.6 | £1.3 | £4.0 | £2.0 | £0.8 | £29.6 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.8 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.2 | £0.0 | £0.1 | £0.8 |
| Dobbies Garden World | £0.0 | £0.0 | £0.3 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| Gallager Retail Park (B&Q) | £7.0 | £7.8 | £5.9 | £4.6 | £5.1 | £2.1 | £4.7 | £1.0 | £1.3 | £39.4 |
| Gallager Retail Park, Norman Road | £4.2 | £7.9 | £3.3 | £4.0 | £3.3 | £1.1 | £5.2 | £1.0 | £1.2 | £31.1 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| John Lewis at Home, Fougeres Way | £2.1 | £3.8 | £2.1 | £1.9 | £1.9 | £0.2 | £1.3 | £1.7 | £0.5 | £15.6 |
| Matalan, Brookefield Road | £0.4 | £0.0 | £0.3 | £0.2 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £1.3 |
| Orbital Trade Park, Ashford | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.3 |
| Warren Retail Park, Ashford | £0.7 | £1.5 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £2.7 |
| Sainsbury's, Simone Weil Ave, Warren RP | £4.6 | £0.0 | £0.1 | £0.8 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £5.8 |
| ASDA, Kimberley Way | £0.2 | £0.8 | £0.0 | £0.1 | £0.0 | £0.8 | £0.9 | £0.0 | £0.1 | £3.0 |
| Tesco Extra, Kingsnorth | £1.8 | £4.3 | £0.0 | £1.3 | £0.6 | £0.0 | £0.2 | £0.7 | £0.1 | £9.1 |
| Tesco Extra, Hythe Road, Crooksfoot | £2.3 | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £2.9 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £1.1 | £0.6 | £1.0 | £4.5 | £29.2 | £3.5 | £0.3 | £0.4 | £0.0 | £40.7 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 |
| **ASHFORD OTHER VILLAGES/STORES:** | £1.9 | £2.9 | £2.7 | £1.0 | £2.0 | £0.0 | £1.6 | £0.1 | £1.4 | £13.6 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.3 | £1.5 | £2.1 | £0.9 | £0.8 | £0.2 | £0.5 | £4.1 | £2.4 | £13.7 |
| CANTERBURY TOWN CENTRE: | £9.8 | £7.5 | £13.3 | £6.7 | £7.0 | £0.5 | £5.4 | £49.1 | £32.7 | £132.0 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.7 | £1.8 | £2.5 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.5 | £0.0 | £0.0 | £0.0 | £0.1 | £0.5 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.2 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.3 | £0.5 | £0.0 | £1.0 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £5.5 | £5.8 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £1.9 | £0.9 | £2.7 | £0.9 | £0.0 | £0.0 | £15.4 | £184.8 | £0.0 | £206.6 |
| FOLKESTON OUT OF CENTRE: | £0.4 | £1.7 | £0.1 | £0.1 | £0.2 | £0.0 | £0.1 | £20.3 | £0.0 | £23.0 |
| HASTINGS/ ST LEONARDS: | £0.1 | £0.0 | £0.0 | £0.0 | £1.6 | £24.7 | £0.2 | £0.0 | £0.0 | £26.6 |
| HYTHE: | £0.0 | £0.1 | £1.4 | £1.3 | £0.3 | £0.0 | £3.2 | £19.9 | £0.0 | £26.3 |
| LONDON: | £1.7 | £0.5 | £0.6 | £0.8 | £2.7 | £1.3 | £0.1 | £4.1 | £0.5 | £12.3 |
| MAIDSTONE TOWN CENTRE: | £1.2 | £4.3 | £1.9 | £0.2 | £12.2 | £0.0 | £1.6 | £1.8 | £17.1 | £40.3 |
| MAIDSTONE OUT OF CENTRE: | £0.3 | £1.0 | £0.4 | £0.1 | £0.1 | £0.0 | £0.5 | £2.5 | £0.0 | £4.9 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £8.7 | £0.0 | £0.0 | £0.0 | £8.7 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.5 | £2.1 | £16.0 | £0.3 | £0.0 | £0.2 | £19.0 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.3 |
| **ALL OTHER SHOPS & STORES:** | £2.3 | £24.7 | £20.8 | £12.5 | £25.9 | £23.1 | £25.3 | £69.9 | £9.4 | £214.0 |
| **TOTAL:** | **£162.4** | **£171.1** | **£119.4** | **£90.1** | **£137.3** | **£100.4** | **£111.5** | **£395.9** | **£85.2** | **£1,373.3** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £19.3 | £42.2 | £43.7 | £24.1 | £53.3 | £74.7 | £52.9 | £357.6 | £69.9 | £737.7 |

**TABLE 8: ALL COMPARISON GOODS - 2030 MARKET SHARE ANALYSIS OF EXPENDITURE FLOWS (£M)**

| | ZONE 1a | ZONE 1b | ZONE 2 | ZONE 3 | ZONE 4 | ZONE 5 | ZONE 6 | ZONE 7 | ZONE 8 | TOTAL STUDY AREA |
|---|---|---|---|---|---|---|---|---|---|---|
| TOTAL AVAILABLE EXPENDITURE (£m): | £199.5 | £210.0 | £146.5 | £110.6 | £168.4 | £122.9 | £135.7 | £481.4 | £104.3 | £1,679.3 |
| **ASHFORD TOWN CENTRE:** | £116.5 | £108.9 | £66.3 | £43.9 | £39.8 | £11.9 | £37.8 | £13.1 | £10.4 | £448.5 |
| **ASHFORD EDGE-OF-CENTRE:** | | | | | | | | | | |
| Lidl, New Street | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| New Street Retail Park | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 |
| **ASHFORD DESIGNER OUTLET:** | £14.7 | £9.1 | £4.2 | £7.3 | £7.5 | £8.2 | £10.5 | £24.7 | £1.0 | £87.3 |
| **ASHFORD OUT-OF-CENTRE:** | | | | | | | | | | |
| Ashford Business (Retail) Park | £12.1 | £3.1 | £2.6 | £5.6 | £3.2 | £1.6 | £4.8 | £2.4 | £0.9 | £36.3 |
| Carpetright, Hall Avenue | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.5 | £0.0 | £0.0 | £0.9 |
| Brunswick Industrial Estate | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Bybrook Barn Garden Centre, Canterbury Rd | £0.1 | £0.2 | £0.2 | £0.0 | £0.0 | £0.1 | £0.2 | £0.0 | £0.1 | £1.0 |
| Dobbies Garden World | £0.0 | £0.0 | £0.4 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.7 |
| Evegate Retail Park | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.2 |
| Gallager Retail Park (B&Q) | £8.6 | £9.5 | £7.2 | £5.6 | £6.2 | £2.6 | £5.7 | £1.2 | £1.6 | £48.3 |
| Gallager Retail Park, Norman Road | £5.2 | £9.7 | £4.0 | £4.9 | £4.0 | £1.3 | £6.4 | £1.2 | £1.5 | £38.1 |
| Howdens, Cobbswood Industrial Estate | £0.0 | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 |
| John Lewis at Home, Fougeres Way | £2.6 | £4.7 | £2.6 | £2.3 | £2.4 | £0.3 | £1.6 | £2.0 | £0.7 | £19.1 |
| Matalan, Brookefield Road | £0.5 | £0.0 | £0.4 | £0.3 | £0.4 | £0.0 | £0.0 | £0.0 | £0.0 | £1.6 |
| Orbital Trade Park, Ashford | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £0.3 |
| Warren Retail Park, Ashford | £0.8 | £1.9 | £0.3 | £0.3 | £0.0 | £0.0 | £0.1 | £0.0 | £0.0 | £3.4 |
| Sainsbury's, Simone Weil Ave, Warren RP | £5.7 | £0.0 | £0.2 | £1.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 | £7.2 |
| ASDA, Kimberley Way | £0.2 | £1.0 | £0.0 | £0.2 | £0.0 | £1.0 | £1.1 | £0.0 | £0.2 | £3.7 |
| Tesco Extra, Kingsnorth | £2.2 | £5.3 | £0.0 | £1.6 | £0.7 | £0.0 | £0.2 | £0.9 | £0.1 | £11.1 |
| Tesco Extra, Hythe Road, Crooksfoot | £2.8 | £0.2 | £0.0 | £0.1 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £3.5 |
| Waitrose, Repton Park | £0.0 | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.3 |
| Tesco Extra, Willesborough | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco Express, Mace Lane | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| Tesco, Grovewood Drive North, Weavering | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| **TENTERDEN TOWN CENTRE:** | | | | | | | | | | |
| All Comparison Goods: | £1.3 | £0.8 | £1.2 | £5.5 | £35.8 | £4.3 | £0.4 | £0.5 | £0.0 | £49.9 |
| Tesco, Smallhythe Road | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 |
| **ASHFORD OTHER VILLAGES/STORES:** | £2.4 | £3.5 | £3.3 | £1.2 | £2.4 | £0.0 | £1.9 | £0.2 | £1.7 | £16.6 |
| **CENTRES / STORES OUTSIDE ASHFORD BOROUGH:** | | | | | | | | | | |
| BLUEWATER: | £1.6 | £1.9 | £2.6 | £1.1 | £1.0 | £0.2 | £0.6 | £5.0 | £2.9 | £16.8 |
| CANTERBURY TOWN CENTRE: | £12.1 | £9.2 | £16.3 | £8.2 | £8.6 | £0.6 | £6.6 | £59.7 | £40.0 | £161.3 |
| CANTERBURY OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.8 | £2.2 | £3.1 |
| CHATHAM TOWN CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.6 | £0.0 | £0.0 | £0.0 | £0.1 | £0.7 |
| CHATHAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.2 | £0.2 |
| DOVER TOWN CENTRE: | £0.0 | £0.0 | £0.3 | £0.0 | £0.0 | £0.0 | £0.3 | £0.6 | £0.0 | £1.2 |
| DOVER OUT OF CENTRE | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FAVERSHAM TOWN CENTRE: | £0.0 | £0.0 | £0.2 | £0.0 | £0.0 | £0.0 | £0.1 | £0.0 | £6.8 | £7.1 |
| FAVERHSAM OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |
| FOLKESTONE TOWN CENTRE: | £2.3 | £1.1 | £3.3 | £1.2 | £0.0 | £0.0 | £18.7 | £224.7 | £0.0 | £251.3 |
| FOLKESTON OUT OF CENTRE: | £0.5 | £2.1 | £0.2 | £0.1 | £0.3 | £0.0 | £0.2 | £24.6 | £0.1 | £28.0 |
| HASTINGS/ ST LEONARDS: | £0.2 | £0.0 | £0.0 | £0.0 | £2.0 | £30.3 | £0.2 | £0.0 | £0.0 | £32.6 |
| HYTHE: | £0.1 | £0.1 | £1.7 | £1.6 | £0.3 | £0.0 | £3.9 | £24.2 | £0.1 | £32.0 |
| LONDON: | £2.0 | £0.6 | £0.7 | £1.0 | £3.3 | £1.6 | £0.1 | £5.0 | £0.6 | £15.0 |
| MAIDSTONE TOWN CENTRE: | £1.5 | £5.3 | £2.3 | £0.3 | £15.0 | £0.0 | £1.9 | £2.2 | £21.0 | £49.4 |
| MAIDSTONE OUT OF CENTRE: | £0.4 | £1.2 | £0.5 | £0.2 | £0.1 | £0.0 | £0.6 | £3.0 | £0.0 | £5.9 |
| RYE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.1 | £10.6 | £0.0 | £0.0 | £0.0 | £10.7 |
| TUNBRIDGE WELLS TOWN CENTRE: | £0.1 | £0.0 | £0.0 | £0.6 | £2.6 | £19.6 | £0.3 | £0.0 | £0.2 | £23.3 |
| TUNBRIDGE WELLS OUT OF CENTRE: | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.4 | £0.0 | £0.0 | £0.0 | £0.4 |
| **ALL OTHER SHOPS & STORES:** | £2.9 | £30.4 | £25.6 | £15.3 | £31.8 | £28.2 | £30.8 | £85.0 | £11.5 | £261.5 |
| **TOTAL:** | **£199.5** | **£210.0** | **£146.5** | **£110.6** | **£168.4** | **£122.9** | **£135.7** | **£481.4** | **£104.3** | **£1,679.3** |
| CENTRES / STORES OUTSIDE ASHFORD BOROUGH: | £23.7 | £51.8 | £53.6 | £29.6 | £65.4 | £91.5 | £64.3 | £434.9 | £85.6 | £900.3 |

**TABLE 9: ESTIMATED 'INFLOW' (TRADE DRAW) FROM OUTSIDE STUDY AREA & TOTAL FORECAST TURNOVERS**

| | Estimated 'Inflow' from Outside Study Area | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| **Main Town Centres:** | | **£297.7** | **£349.7** | **£428.4** | **£525.3** |
| *Ashford Town Centre* | 5% | £267.6 | £314.3 | £385.1 | £472.2 |
| *Tenterden own Centre* | 5% | £30.1 | £35.4 | £43.3 | £53.1 |
| **Other Villages/ shops in Ashford Borough:** | **0%** | **£9.4** | **£11.1** | **£13.6** | **£16.6** |
| **Out of Centre:** | **0%** | **£227.6** | **£266.2** | **£325.1** | **£397.9** |
| *Ashford Designer Outlet* | 60% | £125.6 | £146.4 | £178.6 | £218.3 |
| *Other edge and out of centre stores* | 2% | £102.1 | £119.7 | £146.5 | £179.6 |
| **ASHFORD BOROUGH - TOTAL:** | | **£534.8** | **£627.0** | **£767.1** | **£939.8** |

Notes: 'Inflow' (trade draw) represents the potential expenditure from commuters, tourists and visitors to the Borough's main centres, shops and stores who live outside the defined study area (i.e. beyond Zones 1-8).

**TABLE 10: NEW RETAIL COMMITMENTS - ESTIMATED COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVERS.**

| | | LPA Planning Ref | Estimated Sales Area ($m^2$ net) | Average Sales (£ per $m^2$) | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|---|---|---|
| Land at junction of Dover Place and, Station Road | ATC - Edge of Centre | 11/00382/AS | 446 | £4,500 | £2.0 | £2.2 | £2.5 | £2.8 |
| Tesco Stores Ltd, Smallhythe Road | TTC - Edge of Centre | 10/01036/AS | 363 | £4,500 | £1.6 | £1.8 | £2.0 | £2.2 |
| The Panorama, Park Street, Ashford | Out of Centre | 08/00396/AS | 836 | £4,500 | £3.8 | £4.2 | £4.6 | £5.2 |
| Homebase, Unit 2, Ashford Business Park, Barrey Road | Out of Centre | 13/00631/AS | 326 | £2,250 | £0.7 | £0.8 | £0.9 | £1.0 |
| Unit 8, Warren Retail Park, Simone Weil Avenue | Out of Centre | 11/00689/AS | 326 | £2,250 | £0.7 | £0.8 | £0.9 | £1.0 |
| Unit B, Beaver Industrial Estate, Beaver Road | Out of Centre | 12/01295/AS | 3,121 | £2,250 - £4500 | £10.8 | £11.9 | £13.2 | £14.8 |
| Precinct 13, Ashford Road | Out of Centre | 13/00427/AS | 123 | £4,000 | £0.5 | £0.5 | £0.6 | £0.7 |
| Foodstore, Cheeseman's Green (Finberry) | Planned Local Centre | 02/00278/AS | 735 | £5,500 | £4.0 | £4.5 | £5.0 | £5.6 |
| Foodstore, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 651 | £5,500 | £3.6 | £4.0 | £4.4 | £4.9 |
| Retail units, Chilmington Green (District Centre) | Planned District Centre | 12/00400/AS | 965 | £4,000 | £3.9 | £4.3 | £4.8 | £5.3 |
| Retail units, Chilmington Green (Local Centre) | Planned Local Centre | 12/00400/AS | 179 | £4,000 | £0.7 | £0.8 | £0.9 | £1.0 |
| **TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPACE (£m):** | | | | | **£32.3** | **£35.8** | **£39.8** | **£44.4** |

Notes: Net floor areas based on 70% of gross floor area for each committed scheme as identified by Ashford Borough Council or from planning application documents.
Net sales densities are based on information from the corresponding planning application or based average sales density for similar type schemes.
Annual productivitiy growth identified in Tables 4a and 4b, Retail Planner Briefing Note 12.1: Addendum (October 2014) is applied to identify forecast turnover ranging from 2% to 3.8%.

**TABLE 10A: KEY COMPARISON RETAIL PROPOSALS - ESTIMATED COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVER**

| | LPA Planning Ref | Estimated Sales Area ($m^2$ net) | Average Sales (£ per $m^2$) | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|---|---|
| Designer Outlet Extension | 14/1402 | 6,665 | £6,211 | £41.4 | £45.8 | £51.0 | £56.9 |
| Turnover from the Study Area @ 40% | | | | £16.6 | £18.3 | £20.4 | £22.75 |
| **TOTAL TURNOVER OF PROPOSED COMPARISON RETAIL FLOORSPACE (£m):** | | | | **£16.6** | **£18.3** | **£20.4** | **£22.7** |

Notes: Sales density is identified at £7,040 per $ft^2$ in 2014 based on existing sales density identified for existing floorspace and uplifted by 10% to take account of higher quality retailers intended for the extended floorspace as stated in paragraph 7.13 of the Retail Impact Assessment (RIA) prepared by Dr. Richard Doidge.
Net sale floorspace (7,057m2) estimated at 85% of gross floorspace, which is based on the gross to net guide stated in Footnote (1) page 53 of the RIA. Therefore, we have applied the same ratio to gross sales density to identify net sales density.
Annual productivitiy growth identified by Experian Business Strategies is applied to identify forecast turnover ranging from 2% to 3.8%.

**TABLE 11: ASHFORD BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £534.8 | £627.0 | £767.1 | £939.8 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) [(1)]: | £534.8 | £592.2 | £659.0 | £734.7 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £34.8 | £108.1 | £205.1 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | - | £35.8 | £39.8 | £44.4 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£1.0** | **£68.3** | **£160.8** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **-156** | **10,082** | **21,275** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -223 | 14,402 | 30,393 |

**TABLE 12: ASHFORD TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £267.6 | £314.3 | £385.1 | £472.2 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) : | £267.6 | £296.3 | £329.7 | £367.6 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | | £18.0 | £55.3 | £104.5 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £2.2 | £2.5 | £2.8 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£15.8** | **£52.9** | **£101.8** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **2,598** | **7,802** | **13,470** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 3,712 | 11,146 | 19,243 |

**TABLE 13: TENTERDEN TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £30.1 | £35.4 | £43.3 | £53.1 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) : | £30.1 | £33.3 | £37.1 | £41.4 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £2.0 | £6.2 | £11.8 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £1.8 | £2.0 | £2.2 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£0.2** | **£4.2** | **£9.6** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **39** | **625** | **1,264** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 56 | 893 | 1,806 |

**TABLE 14: OTHER LOCAL CENTRE AND VILLAGES - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £9.4 | £11.1 | £13.6 | £16.6 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) : | £9.4 | £10.5 | £11.6 | £13.0 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £0.6 | £1.9 | £3.7 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £0.0 | £0.0 | £0.0 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | | **£0.6** | **£1.9** | **£3.7** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **103** | **285** | **484** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 147 | 407 | 691 |

**TABLE 15: REST OF BOROUGH - COMPARISON GOODS CAPACITY ASSESSMENT**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| STEP 1: | TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £227.6 | £266.2 | £325.1 | £397.9 |
| STEP 2: | TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m) : | £227.6 | £252.1 | £280.5 | £312.7 |
| STEP 3: | NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | | £14.1 | £44.6 | £85.2 |
| STEP 4: | COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | | £31.7 | £35.3 | £39.4 |
| STEP 5: | **NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **-£17.6** | **£9.3** | **£45.8** |
| STEP 6: | **FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **-2,896** | **1,370** | **6,057** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | -4,137 | 1,957 | 8,653 |

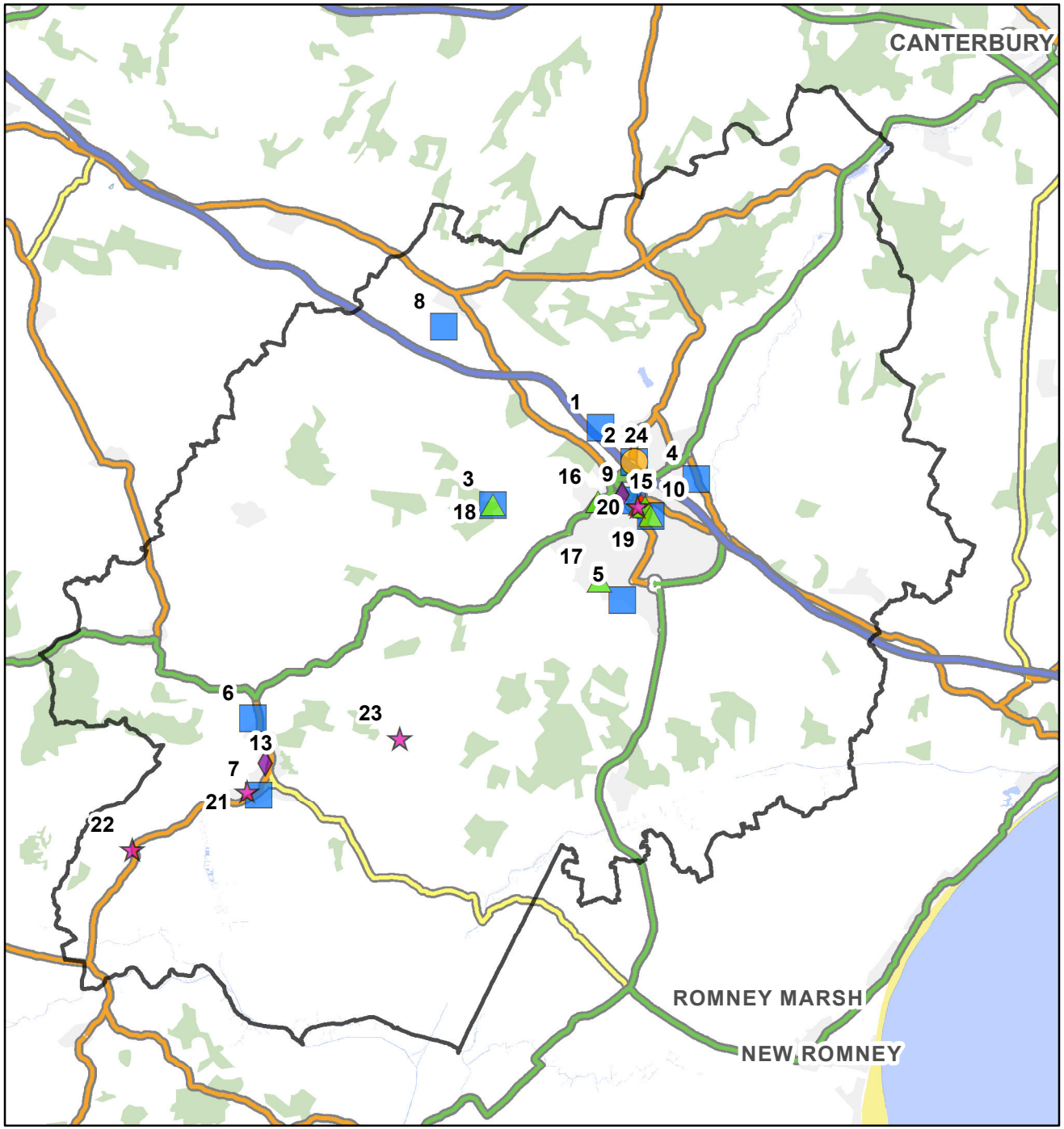
**TABLE 16: ASHFORD TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT - IMPROVED MARKET SHARE (+10%)**
***Assume Equilibrium at Base Year and Constant Market Shares***

| | | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|---|
| | **CURRENT RETENTION FROM ZONES 1-4: 44.9%** | | | | |
| | **IMPROVED RETENTION FROM ZONES 1-4: 54.9%** | | | | |
| STEP 1: | REVISED TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £317.1 | £372.6 | £456.5 | £559.7 |
| STEP 2: | REVISED TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£m): | £317.1 | £351.1 | £390.7 | £435.7 |
| STEP 3: | REVISED NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | £0.0 | £21.5 | £65.7 | £124.1 |
| STEP 4: | REVISED COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m) | £3.6 | £4.0 | £4.5 | £5.0 |
| STEP 5: | **REVISED NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:** | **£0.0** | **£17.5** | **£61.2** | **£119.1** |
| STEP 6: | **REVISED FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:** | | | | |
| | (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £5,500 | £6,090 | £6,777 | £7,556 |
| | **(ii) Net Floorspace Capacity (sq m):** | **0** | **2,866** | **9,036** | **15,757** |
| | (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% |
| | (iv) Gross Floorspace Capacity (sq m): | - | 4,094 | 12,909 | 22,510 |

# APPENDIX 9: LEISURE NEEDS ASSESSMENT

# Leisure Facilities in Ashford Borough

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- Bingo or Casino
- Cinema
- Family leisure
- Gym or sports facility
- Museum
- Theatre

Ashford Leisure Facilities:

1 Ashford Golf Club, Ashford
2 Bannatyne Health Club, Ashford
3 Great Chart Golf Club, Ashford
4 Julie Rose Stadium, Willesborough Road, Ashford
5 Kingsnorth Recreation Centre, Kingsnorth, Ashford
6 London Beach Country Club And Spa, Ashford Road, Tenterden
7 Tenterden Leisure Centre, Tenterden
8 The Green Health Club, Charing, Ashford
9 The Gym, New Street Retail Park, Ashford
10 The Stour Centre, Ashford
11 The Weald Sports Centre, Angley Road, Cranbrook
12 Mecca Bingo Club, High Street, Ashford
13 Sinden Theatre, Tenterden
14 St Mary's Church, Ashford
15 AMF Bowling, Station Road, Ashford
16 Electro Kart, Hilton Road, Ashford
17 Imagine Play Centre, Millbank Road, Ashford
18 Shot The Boss, Great Chart, Ashford
19 The Stour Centre, Ashford
20 Ashford Borough Museum
21 Tenterden And District Museum
22 The Cm Booth Collection Of Historic Vehicles, Rolvenden
23 Woodchurch Village Life Museum, Ashford
24 Cineworld Cinema, Eureka Entertainment Centre, Ashford

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**TABLE 1: POPULATION PROJECTIONS BY ZONE (2015-2030)**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **Zone 1a:** | 35,139 | 37,032 | 38,818 | 40,391 |
| **Zone 1b:** | 40,089 | 42,218 | 44,227 | 45,990 |
| **Zone 2** | 18,282 | 19,207 | 20,103 | 20,900 |
| **Zone 3** | 14,453 | 15,204 | 15,917 | 16,543 |
| **Zone 4** | 22,641 | 23,796 | 24,885 | 25,853 |
| **Zone 5** | 16,995 | 17,625 | 18,359 | 19,046 |
| **Zone 6** | 22,432 | 23,089 | 23,847 | 24,567 |
| **Zone 7** | 84,070 | 86,567 | 89,335 | 92,006 |
| **Zone 8** | 14,691 | 15,304 | 15,931 | 16,525 |
| **Total Study Area:** | **268,792** | **280,042** | **291,422** | **301,821** |

Source: Base year population derived from ONS 2012-based Sub-National Population Projections

**TABLE 2: TOTAL LEISURE EXPENDITURE GROWTH 2015-2030 (%)**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **Volume growth per head (%)** | 0.7 | 1.5 | 1.3 | 1.3 |

Source: Average spend per capita estimates for each zone are derived from Experian *'Retail Area Planner' Reports (2013 Prices)*
Notes: Annual expenditure growth forecasts are informed by Experian's *Retail Planner Briefing Note 12.1 (October 2014).*

**TABLE 3: LEISURE EXPENDITURE PER CAPITA (£M) 2013**

| | Accommodation | Cultural services | Games of chance | Hairdressing salons & personal grooming | Recreational and sporting services | Restaurants, cafes etc | Total |
|---|---|---|---|---|---|---|---|
| **Zone 1a:** | £121 | £301 | £159 | £84 | £118 | £936 | £1,719 |
| **Zone 1b:** | £111 | £281 | £154 | £74 | £106 | £851 | £1,577 |
| **Zone 2** | £204 | £408 | £179 | £129 | £200 | £1,326 | £2,446 |
| **Zone 3** | £201 | £381 | £167 | £119 | £190 | £1,245 | £2,303 |
| **Zone 4** | £196 | £391 | £184 | £121 | £192 | £1,239 | £2,323 |
| **Zone 5** | £186 | £345 | £197 | £110 | £169 | £1,129 | £2,136 |
| **Zone 6** | £147 | £321 | £188 | £103 | £131 | £1,041 | £1,931 |
| **Zone 7** | £143 | £319 | £181 | £95 | £139 | £1,028 | £1,905 |
| **Zone 8** | £183 | £359 | £168 | £112 | £170 | £1,203 | £2,195 |
| **Total Study Area*:** | **£166** | **£345** | **£175** | **£105** | **£157** | **£1,111** | **£2,059** |

Notes: * Average expenditure per capita

**TOTAL 4: TOTAL COMMERCIAL LEISURE EXPENDITURE PER HEAD (£) (2015-2030)**

| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **Zone 1a** | £1,804 | £1,909 | £2,033 | £2,168 |
| **Zone 1b** | £1,655 | £1,752 | £1,865 | £1,989 |
| **Zone 2** | £2,567 | £2,717 | £2,893 | £3,085 |
| **Zone 3** | £2,417 | £2,558 | £2,723 | £2,905 |
| **Zone 4** | £2,438 | £2,580 | £2,747 | £2,930 |
| **Zone 5** | £2,242 | £2,373 | £2,526 | £2,694 |
| **Zone 6** | £2,027 | £2,145 | £2,284 | £2,436 |
| **Zone 7** | £1,999 | £2,116 | £2,253 | £2,403 |
| **Zone 8** | £2,304 | £2,438 | £2,596 | £2,769 |
| **Total Study Area*:** | **£2,162** | **£2,288** | **£2,435** | **£2,598** |

Notes: * Average expenditure per capita

**TOTAL 5: TOTAL COMMERCIAL LEISURE EXPENDITURE (£m) (2015 - 2030)**

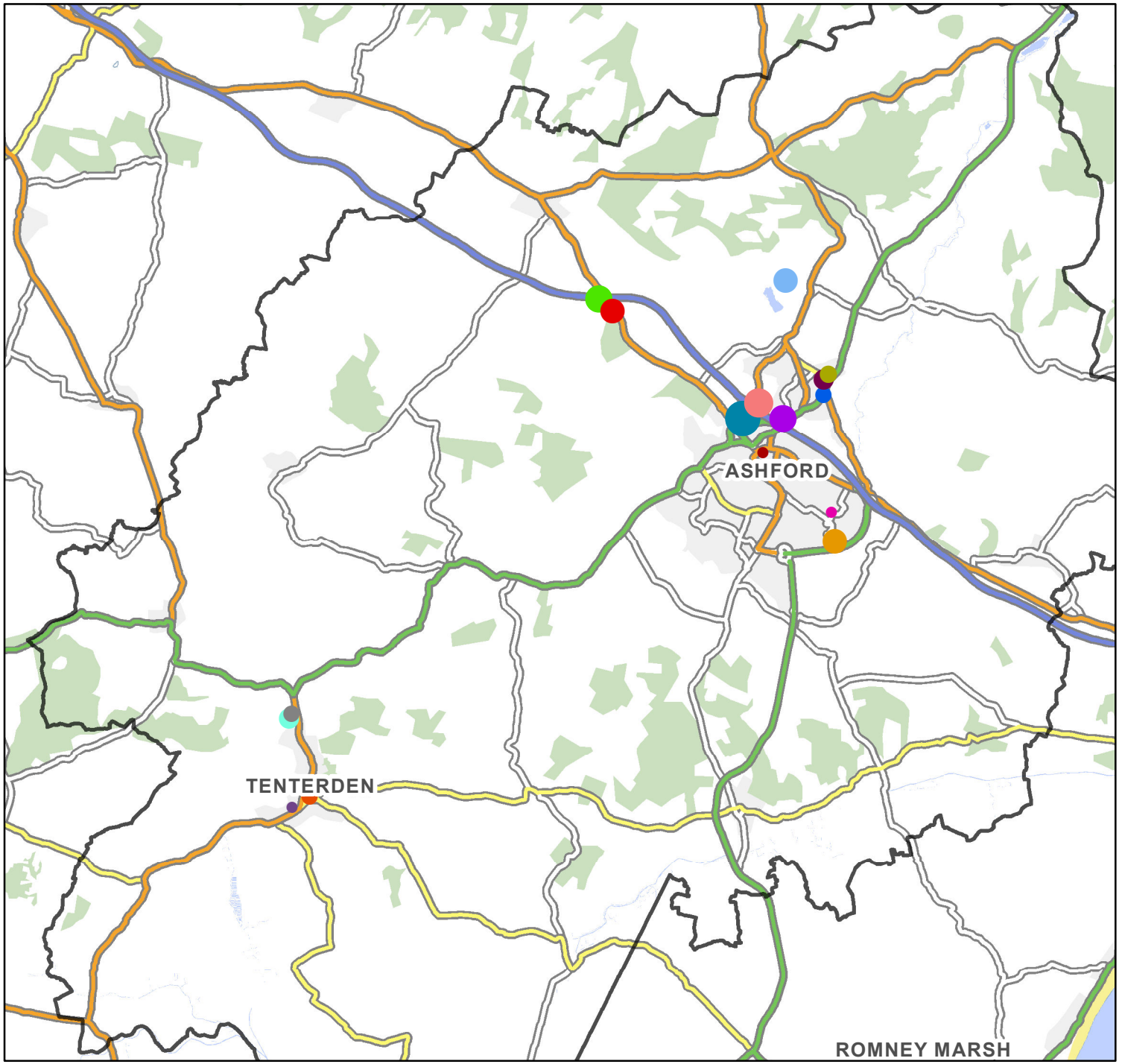
| | 2015 | 2020 | 2025 | 2030 |
|---|---|---|---|---|
| **Zone 1a** | £63.4 | £70.7 | £78.9 | £87.6 |
| **Zone 1b** | £66.4 | £74.0 | £82.5 | £91.5 |
| **Zone 2** | £46.9 | £52.2 | £58.1 | £64.5 |
| **Zone 3** | £34.9 | £38.9 | £43.3 | £48.1 |
| **Zone 4** | £55.2 | £61.4 | £68.4 | £75.8 |
| **Zone 5** | £38.1 | £41.8 | £46.4 | £51.3 |
| **Zone 6** | £45.5 | £49.5 | £54.5 | £59.8 |
| **Zone 7** | £168.1 | £183.2 | £201.3 | £221.1 |
| **Zone 8** | £33.8 | £37.3 | £41.4 | £45.8 |
| **Total Study Area:** | **£552** | **£609** | **£675** | **£745** |

Notes: Table 1 and Table 3

# APPENDIX 10: EXISTING AND PROPOSED HOTEL PROVISION

# Hotel Provision in Ashford Borough

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**Legend***

- Ashford International Hotel
- Travelodge Ashford (Eureka Leisure Park)
- Holiday Inn Ashford-Central
- Holiday Inn Ashford - North A20
- Eastwell Manor
- Premier Inn Ashford Central
- Premier Inn Ashford North
- The Conningbrook Hotel
- London Beach Hotel, Spa and Country Club
- The Croft Hotel
- Little Silver Country Hotel
- Collina House Hotel
- Downsview GuestHouse
- The George Hotel
- Boys Hall Manor
- The Woolpack Hotel

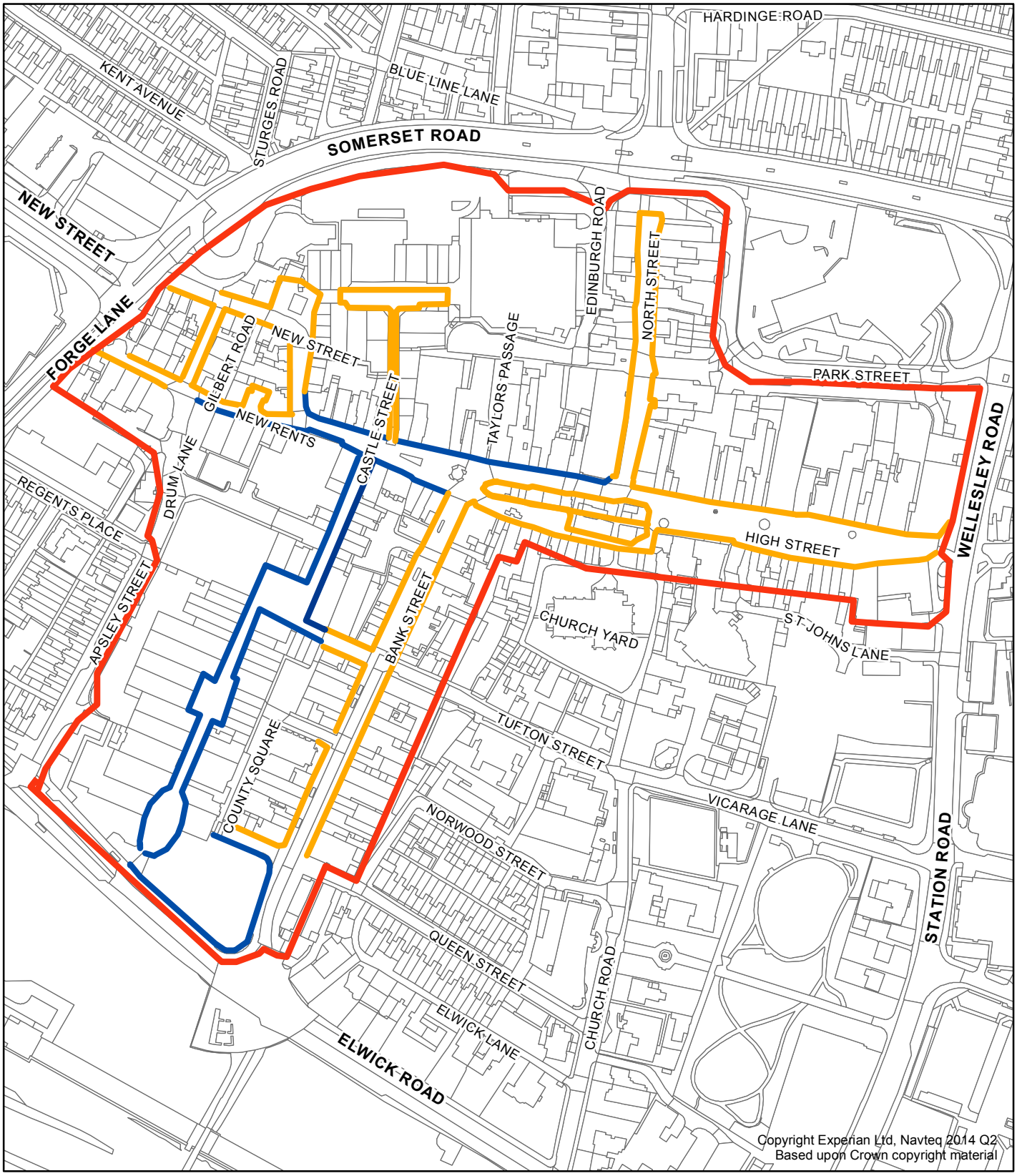
*Icons correspond to the number of beds

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# APPENDIX 11: RECOMMENDED SHOPPING FRONTAGES FOR ASHFORD TOWN CENTRE

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# Ashford Town Centre: Recommended Shopping Frontages




Recommended Primary Shopping Area

Recommended Primary Frontage

Recommended Secondary Frontage

# APPENDIX 12: CONSULTATION REGISTER

## CONSULTATION REGISTER

| Organisation | Summary of comments |
|---|---|
| Central Ashford Community Forum | The Forum completed a detailed questionnaire which gave details of members view on the town centre in addition to details on businesses within Ashford Town Centre.<br><br>The location and quality of parks was the best rated aspect of the town centre while the provision of entertainment/ leisure services was rated as very poor. |
| Kent Invicta | Contact was made with Kent Invicta to establish the general views of businesses Ashford Town Centre. A key representative of the organisation provided an over view of Ashford's key strengths and weaknesses.<br><br>The perceived loss of retailers and footfall to the Designer Outlet Centre was cited as a key concern. Without further investment in the town centre footfall will continue to decline. The town centre needs to find a niche market as it cannot compete directly with the outlet centre.<br><br>Measures to encourage shoppers visiting the Designer Outlet to visit the town centre should be promoted including improved links between the two and better/ more flexible parking provision in the town centre. Of note, the consultee highlighted the importance of promoting non-retail commercial uses, in particular leisure provision. The proposals at Elwick Place considered a key investment for the future survival of the town centre. |
| Tenterden Town Council | The Town Council completed a detailed questionnaire which gave details of their view of Tenterden Town Centre and key trends.<br><br>The centre's shopping environment, foodstore provision and range of shops/ services was the best rated aspect of the town centre while public transport access, parking provision and leisure/entertainment provision was rated as very poor. |
| Tenterden Chamber of Commerce | The Chamber of Commerce completed a detailed questionnaire which gave details of their view of Tenterden Town Centre and key trends.<br><br>Respondents were primarily concerned about the number of charity shops in the centre; about issues of parking control; the level of business rates and the need for improved leisure facilities (for example, a cinema).<br><br>The key competitor towns identified by the Tenterden Chamber of Commerce were Ramsgate, Dover, Gillingham, New Romney, Chatham, Eastbourne and Aylesford. |
| County Square Shopping Centre, Ashford | A representative from Kennedy Wilson, agents for the shopping centre, provided detail on current vacancies and unit sizes within the shopping centre. In addition to this, the consultee provided their opinions on retailer demand for the shopping centre and the wider town centre; particularly in relation to the opening of the Ashford Designer Outlet and the proposed extension.<br><br>The key issues raised in the consultation related to the potential threats associated with the proposed extension to Ashford Designer Outlet. These include the potential location of existing retail multiples from the town centre to the outlet centre which could impact on attracting new retailers to the town centre. |
| Elwick Place/ Stanhope Plc | Representatives from Savills, agents for Stanhope Plc, provided information on the current proposals for Elwick Place. The consultation also sought the consultees views on competing proposals (e.g. the proposed extension to Ashford Designer Outlet). |

| | |
|---|---|
| Ashford Town Team | The Town Team Manager provided their views on the Town Centre and key trends affecting it in addition to information on the work of the Town Team in Ashford Town Centre.<br><br>The consultee indicted that for a medium sized centre, Ashford is doing well, attracting national multiple fashion brands and also maintaining a branded department store. Competition from the Designer Outlet and other out of town is an issue, and promotion of linked trips may encourage footfall in the centre. |
| Marks and Spencer, Ashford | A representative provided detail on their views of Ashford Town Centre and key trends affecting it.<br><br>The consultee expressed a view that Ashford Town Centre had an attractive high street with much potential. However, the offer in the centre needs to be improved, particularly the food and beverage offer. Signage and link to the centre also need to be improved. The Designer Outlet currently has a complementary offer, however, there are concerns that expansion could leave scope for traditional High Street occupiers to move across to the outlet centre. |
| Debenhams, County Square Shopping Centre | A representative provided detail on their views of Ashford Town Centre and key trends affecting it.<br><br>There are some concerns that footfall in the town centre is down and there are some large units in the centre that have been left vacant. The Designer Outlet is drawing people into Ashford Borough but not into the town centre and there is little evidence of linked trips. In order to create a more competitive offer, the town centre should improve the leisure offer (e.g. Cinemas, restaurants), get better signage to key areas/ stores and continue support for recent initiatives such as the market. |
| Canterbury City, Dover District Council, Maidstone Borough Council, Shepway District Council, and Tunbridge Wells Borough Councils. | A telephone discussion was undertaken with neighbouring authorities to identify key retail and leisure commitments and proposals as well as key site allocations intended for future development. |