EB 07.61

Shepway Town Centres Study

Volume 2 — Appendices

On behalf of

Folkestone
Hythe & Romney Marsh
Shepway District Council

30210 | Draft Report | August 2014

Office Address: 16 Brewhouse Yard, Clerkenwell, London EC1V 4LJ
T: +44 (0)207 566 8600 E: london@peterbrett.com

Document Control Sheet

Project Name: **Shepway Town Centres Study**
Project Ref: **30210**
Report Title: **Volume 2 – Appendices**
Appendix: **A**
Doc Ref: **Final Report**
Date: **November 2014**

	Name	Position	Signature	Date
Prepared by:	Tom Marshall	Graduate Planner		November 2014
Reviewed by:	Adam Bunn	Principal Planner		November 2014
Reviewed by:	Peter Keenan	Senior Associate		November 2014
Approved by:	Chris Quinsee	Partner		November 2014
For and on behalf of Peter Brett Associates LLP				

Revision	Date	Description	Prepared	Reviewed	Approved
A	August 2014	Draft report for client comment	TM	AB PK	CQ
B	November 2014	Final report	TM	AB PK	CQ

Contents

Tables

Appendix A Health Check Assessments

1 Introduction

1.1.1 In this Appendix, we set out a detailed assessment of the performance of the principal centres in Shepway District – the centres of Folkestone, Hythe, New Romney, Cheriton, Lydd and Hawkinge. For each centre we review their performance against indicators of town centre vitality and viability set out in the **Planning Practice Guidance**, summarised below:

Vitality and viability of town centres: key indicators
• diversity of uses • proportion of vacant street level property • commercial yields on non-domestic property • customers' views and behaviour • retailer representation and intentions to change representation • commercial rents • pedestrian flows • accessibility • perception of safety and occurrence of crime • state of town centre environmental quality

Source: Planning Practice Guidance (section: 'Ensuring the vitality of town centres', para 005)

1.1.2 Our analysis is based on:

- Site visits to each centre, undertaken by PBA;
- Experian Goad land use/diversity of uses data for the town centres of Folkestone, Hythe, New Romney and Cheriton;
- Other published retail information, including the CoStar Focus Commercial Property Database and the IGD; and
- Information provided by officers at Shepway District Council.

1.1.3 The amount of information available for each centre varies in relation to its size; therefore whilst there is a significant amount of published data to support our analysis of the larger centres, for the smaller centres we rely principally on our own qualitative observations. For some of the indicators listed above, we are not aware of up-to-date data, and therefore we do not include these within our assessments (this relates to commercial yields,

1.1.4 Experian Goad undertake land use / diversity of uses assessments on a frequent basis and we make reference to their most recently published data (and where appropriate update it), which is as follows:

- Folkestone: May 2013
- Hythe, New Romney: November 2012
- Cheriton: May 2012

2 Folkestone town centre health check

2.1 Introduction

2.1.1 Folkestone town centre is the highest order centre in Shepway District; as such it is the principal centre for comparison goods shopping, civic facilities, tourism and arts and culture. The centre also contains two large supermarkets and therefore has an important convenience goods function.

2.1.2 The town centre has a number of distinct areas where the offer, mix and quality of the retail environment can be considered to differ quite substantially. The **primary retail area** (which for the purposes of our 'health check' assessment we have taken to be as allocated in the Local Plan, i.e. focussed around the pedestrianised element of Sandgate Road, but extending this to include the more recent Bouverie Place Shopping Centre which was not developed at the time of preparation of the Local Plan proposals map.

2.1.3 The **secondary retail areas** are the peripheral areas which adjoin the primary retail areas; these include the un-pedestrianised section of Sandgate Road, Cheriton Place, Guildhall Street and Rendezvous Street. In these areas, the diversity of uses is less focused on retail, with a greater mix of services such as estate agents, cafes, pubs and bars, and so on. The areas are generally quieter, with lower levels of pedestrian activity, and some parts of these secondary areas also have higher levels of vacancy – a point which we return to discuss further below.

2.1.4 **The Creative Quarte**r, comprised principally of the Old High Street and Tontine Street, is an area which appears to be in the middle of an important period of change. Many units in the area are currently being redeveloped, and place marketing is taking place to define and promote the area as a hub for the creative industries in the town. This area offers predominantly smaller, independent retail units and includes a number of boutiques, specialist retailers and exhibition space. The area also includes the Quarterhouse, an arts facility which hosts live theatre, music and comedy events, as well as occasional film screenings, which acts as the focal point for the creative sector.

2.1.5 We discuss each of these areas further below.

Folkestone primary retail area

2.1.6 The primary retail environment comprises of Bouverie Place and the pedestrianized section of Sandgate Road leading up to Rendezvous Street. In this part of the centre, retail uses dominate. From our assessment we consider the retail offer to be solid, and reflective of the trends seen in many UK high streets in recent years — a move towards increasing representation from more downmarket, value-orientated retailers such as Wilkinson's and 99p Stores, alongside established national retailers such as Boots, Superdug, Waterstones, WH Smith and Clarks. The opening of the Bouverie Place Shopping Centre has succeeded in bringing a number of higher-profile retailers to the town, including clothing retailers such as Primark, Next and TK Maxx, to complement the Debenhams store on Sandgate Road. These latter four stores can each be considered important 'anchor' stores to the town centre offer.

2.1.7 Other significant retailers include New Look, Poundland and Sports Diret in Bouverie Place, and Wilkinsons, Boots, and 99p Stores who occupy large units on Sandgate Road. The overall retail offer appeared to be orientated towards the lower income groups. It is also apparent that the clothing retail offer is more directed towards middle / older demographics, with – barring Primark and New Look - an absence of 'young fashion' chains such as Topshop, River Island, or H&M.

2.1.8 There is a good range of convenience goods retailers within the primary retail area, chiefly a large Asda store on the upper level in Bouverie Place (although there is poor connectivity between this store and the rest of the retail offer), and an older Sainsbury's store at Bouverie Road West.

Folkestone secondary retail area

2.1.9 The secondary shopping area is the western, unpedestrianised section of Sandgate Road along with fringe retail environments off this street such as Cheriton Place, as well as those areas on the eastern fringes of the primary shopping area such as Guildhall Street. These areas contain a good range of retail services operators such as estate agencies, hair dressers, opticians and the like. These areas also have a greater number of restaurants and cafés in comparison to the primary retail area.

Creative Quarter

2.1.10 The Creative Quarter accounts for much of the eastern side of the town centre, focused on the steeply-descending Old High Street, and Tontine Street The area mostly comprises of small, independent retail units, often occupied by boutique, specialist retailers alongside some art galleries. There appears to be quite a lot of 'churn' in retail activity, with a number of pop-up/temporary shops observed.

2.1.11 The Old High Street is characterised by its narrow, winding street and by its steep topography. As the buildings that align the street are generally from the 18th and early 19th century, this gives the area an attractive feel and one that is noticeably different in style to the townscape of the central area. However, some buildings are in poor condition and there are a number of signs of neglect. A number of buildings are in the process of being renovated by the Creative Foundation, the body leading the ongoing redevelopment of the area.

2.1.12 The units are all of a similar size and given the absence of any larger national multiples it is difficult to claim one store in particular is an anchor store and has a particular importance over another. Rather, the stores and other cultural facilities demonstrate a collective identity which acts as a draw in itself.

2.1.13 The pedestrianised area where Sandgate Road / Guildhall Street leads into Rendezvous Street is particularly attractive, with a pleasing urban realm as a result of the topography and range of massing of the buildings, and is an ideal location for the numerous cafés and restaurants to be situated (whilst there are already some units of this nature at present, it is considered this could be capitalised on to a greater extent). The area has a high representation of restaurant and café's, in comparison to much of the rest of the centre and acts as a natural transition between the mainstream real offer of Sandgate Road / Guildhall Street to the more alternative / cultural offerings of the Creative Quarter. The area thus acts as a natural focal point for encouraging the development of an evening economy.

2.1.14 Along Tontine Street, the lower section of the creative quarter has seen a number of university buildings move into vacant premises. One example is the Brewery Tap, a former pub that has been renovated to be used as a creative space. The street has also been successful in bringing back a number of other units into use, particularly to be used as small industrial workshops or studios in line with the 'creative' identity. The Folkestone Quarterhouse is a more recent addition to the cultural offer of the District: run by the Creative Foundation, the venue sits within the Creative Quarter and plays host to a variety of family shows, alternative theatre, live comedy and music shows, and occasional film screenings. The Quarterhouse is also the home venue for the Folkestone Book Festival, which has been held in the town under various guises every year since 1980.

Harbourside

2.1.15 The Harbourside is comprised of a small number of units located on Harbour Street and Beach Street. These units are focussed towards tourism and are mainly pubs and food outlets. The area also includes a large hotel, meaning it is particularly popular with tourists.

2.2 Vacant units

2.2.1 **Table 2.1** identifies that 18% of units in Folkestone town centre were vacant at the time of our assessment of Folkestone town centre[1]; this is higher than the November 2013 vacancy rate of 17% of units. When compared to the UK average of 12.6%, the above average vacancy rates represent a cause for concern.

Table 2.1 — Folkestone centre vacant units comparison with national average

	UK average	Folkestone % of units	Difference to UK average
Vacant units	12.6%	18.4%	5.77%

Source: PBA research (2014) and Goad data (2013)

2.2.2 There are a number of vacant units that appear to have been vacant for a considerable time. Some of the vacant units are from operators who entered administration during the economic downturn but it is apparent that these units have struggled to be re-let (examples include the former HMV and Blockbuster premises, both of which have until recently been vacant for a considerable length of the time; although we note the former has recently been let to Poundland, who are taking a larger store in the town centre, and the latter has recently reopened as a bed store).

2.2.3 In terms of location the Creative Quarter is where the majority of the units in the centre are vacant. However, many of the properties appear vacant as they are undergoing refurbishment as part of the work of the Creative Foundation. Positively, the number of vacant units in this area has fallen since the time of the most recent Experian Goad survey of the centre in November 2013.

2.2.4 Whilst the primary shopping area generally has a low vacancy rate, many units which were previously vacant have been re-let to downmarket / value retailers (such as 99p Stores letting the former Woolworths unit, or Wilkinson's replacing Marks & Spencer, for example).

2.2.5 Of note is the fact that vacancy rates in secondary retail areas has increased since the time of the most recent Experian Goad survey — this is particularly apparent in Sandgate Road and Cheriton Place. Guildhall Street has also seen a net increase in vacancies. These areas should therefore be monitored carefully by the Council to establish whether an increase in vacant units in these areas is a long-term trend.

[1] Based on Experian Goad definition of town centre boundary

2.3 Diversity of uses in Folkestone town centre

2.3.1 **Table 2.2** compares the diversity of retail uses in the town centre against corresponding UK averages. This is a useful indicator as it helps to identify the retail mix within the centre and whether there are any areas of under-provision. Consideration of Table 2.1 shows that there is an under-representation (in terms of numbers of units) of convenience (food) goods floorspace in Folkestone, with these uses accounting for only 5% of total units. However, when considering in terms of floorspace, as we have highlighted above, the town centre benefits from two large supermarkets, as well as a good supporting range of specialist retailers, and therefore we do not consider this to be particular cause for concern. The Asda and Sainsbury's stores account for 75% of the total convenience floorspace within the centre.

2.3.2 Comparison (non-food) goods retailers accounted for 41% of units in the town centre at the time of the Experian Goad survey, in line with the UK average (also 41%). Most sub-sectors post representation which is slightly below the respective UK average, including each of the clothing sub-sectors (footwear; menswear; womenswear & childrenswear; and mixed & general clothing), which are key drivers of footfall within a town centre. This is balanced by higher representation in the 'books, arts & crafts and stationers' sub-sector, which has representation almost double the UK average. Retail services provision is slightly below the UK average, and in particular we have observed a qualitative shortfall in 'evening economy' uses such as restaurants and bars (an issue exacerbated by the fact that some facilities only open between Thursday and Saturday). There is however a reasonable mix of 'retail services' such hair & beauty outlets, travel agents, banks & building societies, and so on.

2.3.3 The size of the retail stock in Folkestone town centre is worthy of note. With the exception of the key 'anchor' stores such as Debenhams, Primark, and the two supermarkets, the majority of retail stock is from small, often constrained premises. Indeed, 72% of retail units are under 200 sq.m in size, and over half are under 100 sq.m — although these figures are skewed by the presence of a large number of small, historic units within the Creative Quarter.

Table 2.2 — Folkestone centre diversity of uses comparison with national average

	UK average	Folkestone % of units	Difference to UK average
Convenience goods	8.83%	4.85%	-3.98%
Comparison Goods	40.87%	40.82%	-0.05%
Service retailers	36.55%	34.95%	-1.60%
Miscellaneous	1.15%	1.02%	-0.13%

Source: PBA research (2014) and Experian Goad data (2013)

Other uses

2.3.4 The evening economy is the area which is most under-represented in Folkestone town centre. An appraisal was carried out at both midday on a weekday, and during times when employees would be leaving work. The study found very little sign of an evening economy with the centre largely vacated and quiet after 6pm. A large proportion of the restaurant units did not cater on certain days and it was common that these units opened between Thursday and Sundays.

2.3.5 The evening economy is mostly confined to a small assortment of bars and restaurants where Sandgate Road meets Rendezvous Street. Given the 'plaza' feel of this area and the scope for outdoor seating, as noted above, there is scope for intensification of uses in this area, although the Quarterhouse and the Leas also contribute to the evening activity elsewhere in the centre.

2.3.6 There are a number of important office facilities at the edge of the town centre which are likely to use the facilities in Folkestone town centre, however, including the Saga headquarters to the rear of Bouverie Place, and Shepway District Council's offices to the north-west of the town centre.

2.3.7 There is evidence of the importance of tourism to the offer of the centre, around the harbourside area, and also in an around the Leas, with relatively little evidence elsewhere in the town centre.

Evidence of street markets

2.3.8 We understand that there is a small market every Thursday on Sandgate Road, The pedestrianised nature of Sandgate Road means it is suitable for this to be intensified and further developed – perhaps by different types of markets on a weekly/monthly basis (farmers markets, craft markets, seasonal markets and so on). Whilst the creative quarter would suit a market given the independent feel, it may be that the very narrow streets would not be able to accommodate one.

2.4 Retailer requirements

2.4.1 Analysis of the FOCUS Commercial Property Database indicates that demand for retailers specifically seeking representation in Folkestone is relatively weak at present. There are published retailer requirements from Aldi (discount supermarket), Matalan (clothing and homewares retailer, seeking retail warehouse units only), Frankie & Benny's (family dining), Caffe Nero (coffee shop) and Wonderland (nightclub). Whilst the introduction of these retailers into the town centre would have a positive impact on the wider retail offer, with the exception of Caffe Nero it is unlikely there is sufficient suitable property to accommodate the requirements.

2.4.2 Whilst demand is relatively limited for Folkestone, there are strong levels of retail and leisure demand for the wider Kent and South East areas. This means that, whilst an operator may not have a specific requirement for Folkestone, should a suitable site become available it could be of potential interest to retailers with these broader requirements for the area. Examples of retailers with such requirements include Morrisons M Local, Sainsbury's Local, Tesco Express, Waitrose supermarkets; B&M Homestore and Home Bargains discount retailers; and restaurant operators including Pizza Express, Ask, Zizzi and Carluccio's.

2.5 Accessibility

2.5.1 Accessibility to Folkestone town centre can be considered generally good. The centrally-located bus station, whilst evidently an under-utilisation of a prime site within the town centre, is well utilised. The centre is served by frequent intra-urban bus services, plus connections to destinations further afield including Dover, New Romney and Lydd. The town's principal rail station (Folkestone Central) is approximately ten minutes' walk from the primary shopping area, but there is poor wayfinding between the town centre and the station; we understand the Council, in partnership with Kent County Council, is currently working on improving this.

2.5.2 The primary shopping area is pedestrianised throughout, and the wide, open nature of Sandgate Road means there is ample space for pedestrian movements. In terms of accessibility, one downside would be that the primary and secondary retail environments are positioned significantly higher than the tourist-focussed harbourside. The Creative Quarter, that connects the two, is therefore rather steep and would not be particularly accessible by less mobile groups — although the rest of the town centre is also accessible via longer, less steep routes via Tontine Street, plus connecting bus services. Clearly, there is little which can be done in respect of the physical geography of the centre, but signposting of clear options on accessing the town centre from the harbourside may be helpful.

Parking

2.5.3 Folkestone benefits from numerous parking opportunities. **Table 2.3** shows the range of car parking facilities along with their associated prices below. Charging prices are generally considered reasonable, although the Council may wish to consider options for discounted / free parking at certain quieter times. There may be scope for intensification of uses on some of the smaller car parking sites, although we have not collected any data on levels of usage.

Table 2.3 — Folkestone parking locations and charges

Location	Charge
Sainsbury's - 5 Bouverie Road West	30 mins free; £2 for additional hours. Parking is refunded for Sainsbury's customers.
Leas Cliff Hall - Sandgate Road	£3.00 / max
Pleydell Gardens	£3.00 / max
Bouverie Place	£5.50 / 24 hours
Middelburg Square	£5.00 / 24 hours
Rotunda - Lower Sandgate Road	£1.20 / 1 hour
Foresters Way	£3.00 / max
Shellons Street	£3.00 / max
Upper Payers Park	£3.00 / max
Harbourside - 5 Lower Sandgate Road	£6.00 / max
The Tram Road	£6.00 / max

Source: Parkopedia (2014) and PBA site visits

2.6 Perception of safety / occurrence of crime

2.6.1 Some areas of the urban realm involve narrow, secluded streets but no particularly 'no-go' areas were observed. The centre also had adequate lighting throughout and some evidence of CCTV. Some tired, more run-down locations, particularly off Main Street, could give the perception of unsafety.

2.7 State of town centre environmental quality

2.7.1 The quality of the town centre environment is, for the most part, functional, but many parts of the centre – particularly some of the secondary areas (Sandgate Road, Guildhall Street) – are beginning to look tired and in need of investment. This view was also identified in the findings of the on-street pedestrian survey, with making improvements to the environmental quality of the town centre considered to be the key area in which the town centre could be improved.

2.7.2 The primary shopping area is well-maintained and the Victorian architecture throughout the centre helps to provide an attractive setting. The town centre benefits from a pedestrianised primary shopping area but 'softening' of this environment through the introduction of more public realm and greenery would be beneficial, as it current feels somewhat 'stark'.

2.8 Summary of vitality and viability of Folkestone town centre

2.8.1 Folkestone town centre is, on the whole, performing adequately when assessed against PPG indicators; the centre is 'getting by', but there is little to suggest that its performance is any stronger than this. Diversity of uses is reasonable, with most day-to-day uses able to be met, and the centre is easily accessible with a satisfactory level of environmental quality. The emerging Creative Quarter is unquestionably an important asset to the town centre, with a creative / cultural offer far stronger than many towns of Folkestone's size —although despite being entirely complementary to the more 'mainstream' offer elsewhere in the town centre, it requires better integration in order for the benefits it brings to be fully realised.

2.8.2 There is no doubt that Folkestone town centre is currently facing a number of challenges which it will need to address to ensure the long-term vitality and viability of the centre. In particular, the almost-entire absence of an evening economy, particularly in respect of family restaurants, reduces the attractiveness of the centre as anything other than a shopping destination for many parts of the population; the centre is extremely quiet after 6pm. The high numbers of vacant units also represents cause for concern, and should be closely monitored in future years to identify particular trends in terms of where vacancy levels are consistently high. Investment in some of the areas with higher levels of vacancy, such as Guildhall Street, is required in the short term, to help arrest this trend for increasing numbers of vacancies.

3 Hythe town centre health check

3.1 Introduction

3.1.1 Hythe is the second-largest centre in Shepway District and has a retail offer which is significantly different to much of that offered in Folkestone. Again, the focus of the town centre is on retail uses, but the offer is largely orientated towards independent retailers with a more specialist product offer, particularly in respect of comparison goods. The offer is largely confined to units along a single road (High Street), which is closed to vehicular traffic during the middle of the day to allow market stalls to trade. The centre appears popular and well-supported, and pedestrian flows are strong throughout the centre — partly due to the position of large foodstores at either end of (although slightly disconnected from) the High Street (Waitrose to the west, Sainsbury's to the east), as well as Aldi and Iceland stores at the centre of the High Street. These stores act as 'anchors' to the rest of the retail offer, and help to ensure that there is a good level of pedestrian activity throughout the centre.

3.1.2 Alongside the supermarkets and independent retailers are a small number of national comparison goods multiples (Boots, WH Smith) and retail services (banks including Natwest, Santander and HSBC; and Thomas Cook travel agency). However, the majority of units are given over to independent retailers, often selling specialist, higher-end products, for example Posh Potions (beauty and spa products), Aristan (interior decorations) and Temptations (clothing). The retail offer is supported by a number of independent coffee shops which help to increase dwell-time in the centre, and a small number of independent restaurants. There is a small market which trades from a purpose-built facility on Malthouse Hill on Fridays and Saturdays, which further adds to the diversity of uses in the centre. There are a number of charity shops occupying relatively prominent units along the High Street; whilst these also add to the retail diversity, the high number is considered an over-representation and possibly an indicator of limited demand for premises by more prominent retailers.

3.2 Vacant units

3.2.1 **Table 3.1** shows that Hythe has a vacancy rate of 6.6%[2], significant below the current UK average of 12.6%.

Table 3.1 — Hythe centre vacant units comparison with national average

	UK average	Hythe % of units	Difference to UK average
Vacant units	12.60%	6.63%	-5.97%

PBA research (2014) and Experian Goad data (2013)

3.2.2 Significantly, where properties had been vacant last year (at the time of the Experian Goad survey) many of these have subsequently been let, meaning there has been an overall net reduction in the number of vacant units. Some of the vacant units in more peripheral areas of the centre, such as Bank Street and Marine Walk, appear to be longer-standing vacancies. Many of the vacant properties had been re-let by retail units aimed towards the service sector, for instance a couple had reopened as hair salons, and others as tailors, and funeral directors.

[2] Experian Goad definition of town centre boundary

3.3 Diversity of uses in Hythe town centre

3.3.1 **Table 3.2** below shows the diversity of uses in Hythe town centre in comparison to current UK averages. Across all uses, the diversity is largely in line with the national level, and on the whole we consider the centre to have a balanced retail and services mix.

3.3.2 The convenience goods offer is anchored by the three aforementioned supermarkets, and these are considered to act as the 'anchor' stores. There is a small range of supporting specialist convenience goods retailers. The comparison goods offer is slightly higher than the UK average, which is partly due to a larger number of charity shops in the town centre, with charity shops representing 9% of the total offer, compared to a UK average of 4.2%.

Table 3.2 — Diversity of uses in Hythe town centre

	UK average	Hythe % of units	Difference to UK average
Convenience goods	8.83%	8.43%	-0.40%
Comparison Goods	40.87%	45.18%	4.31%
Service retailers	36.55%	39.16%	2.61%
Miscellaneous	1.15%	0.60%	-0.55%

PBA research (2014) and Experian Goad data (2013)

3.3.3 The retailing offer overall appears to be generally of a higher quality than Folkestone and included a number of specialist comparison units such as arts and craft shops, and furniture stores. The centre is appears to be mainly focussed towards the daytime economy however there also appears to be a number of independent restaurants meaning that the centre supports a small evening economy.

3.3.4 Overall, the centre appears particularly vibrant. This is in part due to the primary shopping street being pedestrianised between 11.00 and 15.00 in the daytime, allowing small market units in the street. There also appeared some office units off the main street and during the study some lunchtime trade was evident, which helped ensure the centre was vibrant throughout the day.

Evidence of tourism

3.3.5 The tourism sector is less apparent in Hythe in comparison to Folkestone. There were few retailing units that appeared to specifically cater towards tourists, however the attractive urban setting and a number of cafés and restaurants would lend itself to supporting a tourism industry, i.e. visitors to the wider local area. The centre benefits from a close proximity to a number of sports and leisure facilities such as Hythe Imperial Golf Club, Hythe Cricket club and the adjoining bowling ground. There are also a number of tourism facilities located on the edge of the town centre, including the terminus of the Romney, Hythe and Dymchurch Railway and the Hythe Military Canal, and we would expect that facilities inthe town centre would benefit from passing trade from some customers wishing to access these facilities.

3.4 Perception of safety and occurrence of crime

3.4.1 No particular issues were observed in respect of this indicator.

3.5 State of town centre environmental quality

3.5.1 The buildings are of a high quality throughout and the urban realm is well maintained; overall we would consider the visual appearance of the town centre is positive. The buildings are all predominantly of two and three storey and in a coherent layout. At the heart of the high street, in front of the Aldi, is a small plaza with a café that breaks up the urban form.

3.6 Accessibility

3.6.1 The primary shopping street (High Street) runs parallel to the main traffic corridor of Prospect Road. This means that the High Street is not congested from through-traffic, allowing the primary shopping area to be pedestrianized for part of the retail trading hours.

3.6.2 The three supermarkets Sainsbury's, Aldi and Waitrose provide the majority of parking opportunities throughout Hythe. In particular, large parking facilities are found at either end of the high street at the Sainsbury's and Waitrose supermarkets, with a smaller parking provision in the centre of the town at Aldi (which appears particularly well-used by users of the centre). Parking is intended for consumers to that particular store however some, such as the Waitrose car park, allow free parking for up to 2 hours. In addition some parking is available on street in certain areas, particularly along Military Road towards the west of the centre. The centre is on a high-frequency bus route between Lydd and Folkestone and there are a number of stops along Prospect Road which allow for access the centre.

3.7 Summary

3.7.1 Hythe appears to be performing well. It has a good range of anchor stores (three supermarkets, which appeal to a wide range of demographies), an excellent range of independent retail outlets and café/restaurant facilities, sufficient car parking opportunities, and an attractive public realm. It success is likely to partly relate to the fact is offer is, for the most part, quite different to that of Folkestone, providing a niche/specialist retail offer rather than replicating the mainstream offer in the town centre.

4 Cheriton health check

4.1 Introduction

4.1.1 Cheriton High Street is a linear district centre to the north-west of the Folkestone urban area. It comprises of just under a hundred retail units along a single, linear road. The main 'anchor' store to the centre is a Co-Operative convenience store (although there is a large Tesco foodstore to the west of the centre, but outside the centre boundary). There is a reasonable range of other convenience and comparison goods units, whilst the majority of retail services units are given over to take-aways and fast food retailers.

4.2 Diversity of uses in Cheriton centre

4.2.1 A summary of the diversity of uses in Cheriton town centre is shown in **Table 4.1.** It shows that the diversity of convenience goods uses is in line with UK averages, whilst – unusually for a district centre – there is as above-average representation of comparison goods units, and an under-representation in retail services units (such as hair & beauty, estate agents, restaurants and so on). Similar to Hythe, the centre has a high representation of charity shops at 9% compared to the national average of 4.2%. However, the quality of the retail services element is poor – as noted above there are a large number of take-aways, and whilst these do help to meet local needs to an extent, the presence of a large number of these brings down the overall quality of the centre and does not project a positive image of the centre. We also note that there are a large number of betting shops trading within the centre. With the exception of the Co-Operative supermarket, there is no other clear 'anchor' store within the centre – which given the linear nature of the centre and the fact it extends over a long stretch of road, means footfall is dispersed and the centre lacks any real focus.

Table 4.1 — Cheriton district centre diversity of uses comparison with national average

	UK average	Cheriton % of units	Difference to UK average
Convenience goods	8.83%	8.99%	0.16%
Comparison Goods	40.87%	44.94%	4.07%
Service retailers	36.55%	32.58%	-3.97%
Miscellaneous	1.15%	1.12%	-0.03%

PBA research (2014) and Experian Goad data (2013)

4.3 Vacant units

4.3.1 Vacancy rates in the centre are comparable to the current UK average, as can be seen in **Table 4.2.**

Table 4.2 — Cheriton district centre vacant units comparison with national average

	UK average	Chreriton % of units	Difference to UK average
Vacant units	12.60%	12.36%	-0.24%

Source: PBA research (2014) and Experian Goad data (2013)

4.3.2 Vacancy rates have improved slightly in the past year, falling from 14.6% (at the time of the most recent Experian Goad survey) to 12.4% of units in the centre. The properties that have newly become vacated and those that are newly occupied represent a broad mix of types, so it is difficult to determine a particular broad pattern – i.e. there appears to be a high level of 'churn' of units, with businesses appearing to struggle to stay open over medium to long term periods. Whilst vacancy rates have on the whole fallen, a number of the premises have become occupied as charity shops or community units where the rental return may not be as high as for open market units.

4.3.3 It is recommended that the Council monitor the vacancy levels in the centre carefully, in particular monitoring for the appearance of 'clusters' of vacant units.

4.4 State of town centre environmental quality

4.4.1 There is considerable scope to improve the environmental quality of Cheriton High Street. Much of the centre is looks tired and run down, and several properties are in need of investment to bring them up to an acceptable quality. The appearance of the public realm is also undermined due to the significant amount of traffic that runs through the busy high street that serves as a key route in and out of Folkestone, and the volume of parked cars alongside the High Street. Streets off the High Street are also well used for parking by visitors to the centre. However, it is also acknowledged that the vitality and viability of the centre is likely to, in part, be supported by the ability of users of the centre to park in close proximity to the shops and services it offers.

4.5 Accessibility

4.5.1 The centre's location on one of the principal routes into Folkestone means the centre benefits from a good level of accessibility. It also ensures that the centre is served by a good number of bus routes. On-street parking, and some on pavement parking, means that some areas can be appear unsafe to some users of the centre. This is particularly the case for pedestrians wishing to cross busy side streets. There is no provision for cyclists throughout the centre, and given the busy nature of many of the streets and side streets the centre could be seen as quite unsafe for some cyclists.

4.6 Summary

4.6.1 Cheriton functions adequately as a district centre, but displays a number of indications of vitality and viability which are cause for concern. Most notably, the vacancy rate needs to be carefully monitored through the Council's AMR, including identification of units which remain vacant for long period of time. There are a number of shortcomings with the physical appearance of the centre which serve to undermine the appearance of the centre. It is likely that investment will need to be made in improving the environment quality of the centre in order to ensure it continues to adequately meet local residents' day to day shopping needs over the course of the Council's plan period. The centre also suffers from a lack of anchor stores, with the exception of the Co-Operative store, which means that the more peripheral parts of the centre feel unfocused;

there is no real 'reason' to visit parts of the centre. Introduction of a second convenience store to the centre (a small supermarket or discount foodstore) might help to better define the centre.

5 New Romney health check

5.1 Introduction

5.1.1 New Romney, along with Hythe, is a second-tier 'strategic' town centre. There is a large Sainsbury's foodstore at the eastern end of the town centre, whilst the offer along the main High Street comprises of a range of predominantly-independent convenience, comparison and services retailers, including a small number of specialist retailers such as a delicatessen, crafts shop and tea rooms. There are a handful of national retailers present in the town including Subway and Spar.

5.1.2 The town also has an important tourism function; it serves as the focal point for a number of heritage and outdoor activities, including the historic Romney, Hythe & Dymchurch Railway, which runs from Hythe to Dungeness, but is based in New Romney. The station in New Romney sits a short distance outside the town centre, and has extensive visitor facilities such as engine workshops, exhibitions, children's activities, a gift shop and so on. New Romney's location within the Romney Marsh means it also acts a centre for walkers and cyclists, and there are a number of retailers in the town centre whose offer is geared towards meeting the needs of visitors to the area.

5.2 Diversity of uses in New Romney town centre

5.2.1 Almost half of all units in New Romney town centre are given over to comparison goods uses, over 7% above the UK average, with a number of these retailers catering towards the outdoor pursuits needs of visitors to the area (for example cycle shops). The centre also has a marginally higher level of retail services retailers; most notably, New Romney has a high proportion of estate agents, which account for approximately 10% of the total units, as opposed to the UK average of just under 4%. Convenience goods representation is slightly below average but is nevertheless considered to be reasonable.

5.2.2 Many of the units are local stores and there are very few national retailers and services operators other than Spar, Subway, Natwest, Lloyds Bank and Lloyds Pharmacy, as well as the aforementioned Sainsbury's store. Other than retail units, there are very few dwellings and office units in the centre.

Table 5.1 — New Romney centre diversity of uses comparison with national average

	UK average	New Romney % of units	Difference to UK average
Convenience goods	8.83%	6.90%	-1.93%
Comparison Goods	40.87%	48.28%	7.41%
Service retailers	36.55%	39.66%	3.11%
Miscellaneous	1.15%	1.72%	0.57%

Source: PBA research (2014) and Goad data (2013)

5.2.3 The centre faces some degree of competition from small units on Littlestone Road and Station Road that can be found a small distance away.

5.3 Vacant units

5.3.1 **Table 5.2** identifies that the vacancy rate in New Romney is significantly lower than UK average. Furthermore, since last year, six of the seven vacant units listed have been re-let, with one property remaining vacant and one unit that was previously occupied becoming vacated. This suggests that demand for premises is good, as when vacant units become available they are often quickly let.

Table 5.2 — New Romney centre vacant units comparison with national average

	UK average	New Romney % of units	Difference to UK average
Vacant units	12.60%	3.45%	-9.15%

Source: PBA research (2014) and Experian Goad data (2013)

5.4 State of town centre environmental quality

5.4.1 New Romney is a pleasant, visually attractive appearance; a historic character; and a clean and well-maintained urban realm, although it can be seen that some of the retail properties appear slightly dated. Generally however we consider the town centre to offer a good environmental quality; it is a pleasant centre which encourages visitors to spend time there. No major areas requiring urgent attention were identified by our assessments of the centre.

5.5 Accessibility

5.5.1 at the time of our visit we observed that the majority of the on-street parking was occupied The High Street is a main road that links Folkestone with western locations such as Lydd and at times appears quite congested. The High Street also contains few crossings that make navigating relatively more difficult. This is particularly so as the main crossing is located in the centre of the high street so it does not provide a natural retail circuit. Whilst the popularity of car parking facilities is clearly an indication that the centre is well-supported, it also suggests that there may be a need for additional provision.

5.5.2 Public transport accessibility is restricted to bus services, but the centre benefits from a good frequency service on route 101 which runs every 15-30 minutes linking the town with Lydd and Dover, via Folkestone and Hythe town centres.

5.6 Summary

5.6.1 The town centre performs generally well and the centre appears quite vibrant, with the town centre's role as a both a service centre and tourist base for the wider Romney Marsh area clearly apparent. The centre has a low vacancy rate, and a diversity of uses which mostly meet local needs and accurately reflects the role and function of the centre in the District's hierarchy. There is likely to be limited scope for expansion of the centre over the course of the study period, as there is no obvious scope for expansion of the centre

6 Lydd health check

6.1.1 Lydd is a small town centre which lies to the western fringes of the district. Many residents are likely to look towards New Romney for their shopping needs. The centre is a typical of many village retail environments and is comprised of just under twenty units predominantly serving local needs. The offer mainly consists of service retailers such as pubs, restaurants and takeaways, and some convenience units, which are interspersed between a number of residential properties (meaning that the centre can, in places, feel slightly disjointed). The centre's main anchor store is a Spar supermarket, and there is also a small Co-Operative store in the centre. Given the size of the centre, the diversity of uses is obviously fairly limited, but nevertheless is considerable reasonable within this context, and what would be expected for a lower-order centre.

6.1.2 The public realm is particularly pleasing with many attractive properties that fit in with its village feel. The remoteness of Lydd and its distance away from the other centres of Folkestone and Hythe means that the centre has low levels of traffic. There is little specifically allocated space for parking and the majority of the provision is found on street. Despite its size, the centre is well served in terms of public transport The centre serves local requirements and there are no significant problems with vacancy or diversity of uses.

6.1.3 Despite its small size, Lydd has an important role and function as meeting the needs of a wide surrounding rural area and, as with other centres in the District, we also expect there to be some scope for the centre to benefit from passing tourism trade (albeit not to the same extent as New Romney, for example). Nevertheless there is some scope for the centre to benefit from the centre's location within Romney Marsh, and in particular the nearby Dungeness Nature Reserve.

6.1.4 We understand from the Council that there has been a gradual erosion in the number of properties used as retail premises in recent years, and suitable policy should be introduced to protect the retail function of the remaining premises, in order to continue to allow local needs to be met over the course of the study period.

6.1.5 When considered in the context of the role and function of the centre, Lydd displays generally positive signs of vitality and viability.

7 Hawkinge health check

7.1.1 Hawkinge functions as a small village centre and is comprised of approximately ten units, which sit in between residential units located on Canterbury Road, lending the centre a slighty disjointed feel. The centre is anchored by a small Tesco Express supermarket; beyond the town centre there is also a Lidl supermarket located on Haven Drive, but the two areas do not benefit from particularly strong linkages. Whilst the centre benefits from a pleasant environment, it ultimately serves a limited role and function in the retail hierarchy of the District.

7.1.2 The main retail high street is Canterbury Road and is largely comprised of residential units. The retail units are therefore intermittently found in amongst the residential units, many of which within refurbished residential units, which mean that, as with Lydd, the high street appears slightly disjointed, and we would advise that further loss of retail units should be resisted.

7.1.3 Positively none of the units were vacant at the time of our visit to the centre.

7.1.4 The urban realm is pleasant and soft landscaping gives the street a particularly green feel. The pavements were generally well maintained and easy to navigate. The centre, similar to the other main centres in the District, had adequate public transport provision and is situated along a busy bus route into Folkestone.

7.1.5 Given the scale of the high street and its appearance it is therefore unlikely that residents outside of Hawkinge would travel for retail purposes to Hawkinge; conversely we expect most residents in the town to travel to Folkestone to meet most of their shopping needs, although the presence of the Lidl store ensures that some convenience goods expenditure can be expected to be retained. There may be some potential for the centre to attract passing trade from visitors to the Kent Battle of Britain Museum, but the limited offer in the centre will restrict the ability for any significant inflow to be attracted.

7.1.6 Nonetheless, the centre appears relatively busy as it serves a significant number or residential units in the vicinity. Furthermore, Hawkinge appears to be an area that has expanded its population in recent years with the Blenheim Court residential development opened in 2009. If Hawkinge is considered an area where more residential units could be provided the council could consider providing a larger range of retail units in the future, although there are no obvious development opportunities within the centre itself, and as a consequence, should the Council wish to support additional retailing facilities in Hawkinge, we would expect these would have to come forward in the Haven Drive area, proximate to the Lidl store.

Appendix A.1 Diversity of uses data

		UK average	Folkestone #units	Folkestone % of units	Folkestone difference to UK average	Hythe #units	Hythe % of units	Hythe difference to UK average	Cheriton #units	Cheriton % of units	Cheriton difference to UK average	New Romney #units	New Romney % of units	New Romney difference to UK average
		Nov-13	2013	2013	2012	2012	2012	2012	2012	2012	2012	2012	2012	2012
Convenience goods retailers														
G1A	Bakers	2.19%	3	0.76%	-1.43%	3	1.81%	-0.38%	2	2.25%	0.06%	0	0.00%	-2.19%
G1B	Butchers	0.77%	2	0.51%	-0.26%	2	1.20%	0.43%	1	1.12%	0.35%	1	1.72%	0.95%
G1C	Greengrocers & fishmongers	0.62%	3	0.76%	0.14%	1	0.60%	-0.02%	1	1.12%	0.50%	1	1.72%	1.10%
G1D	Grocery and frozen foods	2.92%	8	2.02%	-0.90%	5	3.01%	0.09%	2	2.25%	-0.67%	1	1.72%	-1.20%
G1E	Off-licences and home brew	0.50%	0	0.00%	-0.50%	1	0.60%	0.10%	0	0.00%	-0.50%	0	0.00%	-0.50%
G1F	Confectioners, tobacconists, newsagents	1.83%	3	0.76%	-1.07%	2	1.20%	-0.63%	2	2.25%	0.42%	1	1.72%	-0.11%
	TOTAL	**8.83%**	**19**	**4.80%**	**-4.03%**	**14**	**8.43%**	**8.43%**	**8**	**8.99%**	**0.16%**	**4**	**6.90%**	**-1.93%**
Comparison goods retailers														
G2A	Footwear & repairs	1.79%	5	1.26%	-0.53%	2	1.20%	-0.59%	0	0.00%	-1.79%	2	3.45%	1.66%
G2B	Men's & boys' wear	1.00%	1	0.25%	-0.75%	1	0.60%	-0.40%	0	0.00%	-1.00%	0	0.00%	-1.00%
G2C	Women's, girls, children's clothing	3.61%	11	2.78%	-0.83%	3	1.81%	-1.80%	1	1.12%	-2.49%	1	1.72%	-1.89%
G2D	Mixed and general clothing	3.98%	14	3.54%	-0.44%	7	4.22%	0.24%	2	2.25%	-1.73%	0	0.00%	-3.98%
G2E	Furniture, carpets & textiles	3.36%	15	3.79%	0.43%	7	4.22%	0.86%	2	2.25%	-1.11%	4	6.90%	3.54%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.37%	31	7.83%	3.46%	10	6.02%	1.65%	3	3.37%	-1.00%	4	6.90%	2.53%
G2G	Electrical, home entertainment, telephones and video	3.81%	13	3.28%	-0.53%	4	2.41%	-1.40%	6	6.74%	2.93%	1	1.72%	-2.09%
G2H	DIY, hardware & household goods	2.50%	8	2.02%	-0.48%	3	1.81%	-0.69%	4	4.49%	1.99%	3	5.17%	2.67%
G2I	Gifts, china, glass and leather goods	1.65%	7	1.77%	0.12%	4	2.41%	0.76%	0	0.00%	-1.65%	0	0.00%	-1.65%
G2J	Cars, motorcycles & motor accessories	1.18%	4	1.01%	-0.17%	0	0.00%	-1.18%	6	6.74%	5.56%	2	3.45%	2.27%
G2K	Chemists, toiletries & opticians	3.88%	10	2.53%	-1.35%	6	3.61%	-0.27%	2	2.25%	-1.63%	2	3.45%	-0.43%
G2L	Variety, department & catalogue showrooms	0.64%	2	0.51%	-0.13%	0	0.00%	-0.64%	1	1.12%	0.48%	0	0.00%	-0.64%
G2M	Florists and gardens	0.89%	2	0.51%	-0.38%	3	1.81%	0.92%	2	2.25%	1.36%	2	3.45%	2.56%
G2N	Sports, toys, cycles and hobbies	2.05%	11	2.78%	0.73%	4	2.41%	0.36%	4	4.49%	2.44%	1	1.72%	-0.33%
G2O	Jewellers, clocks & repair	1.98%	7	1.77%	-0.21%	3	1.81%	-0.17%	0	0.00%	-1.98%	1	1.72%	-0.26%
G2P	Charity shops, pets and other comparison	4.19%	24	6.06%	1.87%	15	9.04%	4.85%	7	7.87%	3.68%	3	5.17%	0.98%
	TOTAL	**40.87%**	**165**	**41.67%**	**0.80%**	**72**	**43.37%**	**2.50%**	**40**	**44.94%**	**4.06%**	**26**	**44.83%**	**3.95%**
Services retailers														
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	16.39%	65	16.41%	0.02%	25	15.06%	-1.33%	16	17.98%	1.59%	7	12.07%	-4.32%
G3B	Hairdressers, beauty parlours & health centres	9.44%	33	8.33%	-1.11%	16	9.64%	0.20%	7	7.87%	-1.57%	6	10.34%	0.90%
G3C	Laundries & drycleaners	0.92%	3	0.76%	-0.16%	3	1.81%	0.89%	1	1.12%	0.20%	0	0.00%	-0.92%
G3D	Travel agents	1.13%	4	1.01%	-0.12%	1	0.60%	-0.53%	0	0.00%	-1.13%	0	0.00%	-1.13%
G3E	Banks & financial services (incl. accountants)	4.25%	12	3.03%	-1.22%	7	4.22%	-0.03%	3	3.37%	-0.88%	2	3.45%	-0.80%
G3F	Building societies	0.58%	1	0.25%	-0.33%	1	0.60%	0.02%	0	0.00%	-0.58%	0	0.00%	-0.58%
G3G	Estate agents & auctioneers	3.85%	17	4.29%	0.44%	8	4.82%	0.97%	1	1.12%	-2.73%	5	8.62%	4.77%
	TOTAL	**36.55%**	**135**	**34.09%**	**-2.46%**	**61**	**36.75%**	**0.20%**	**28**	**31.46%**	**-5.10%**	**20**	**34.48%**	**-2.08%**
Miscellaneous and vacant units														
G4A	Employment, careers, Post Offices and information	**1.15%**	4	1.01%	**-0.14%**	1	0.60%	-0.55%	0	0.00%	-1.15%	1	1.72%	1.72%
G4B	Vacant units (all categories)	**12.60%**	73	18.43%	**5.83%**	18	10.84%	-1.76%	13	14.61%	2.01%	7	12.07%	12.07%
	TOTAL	**100.00%**	**396**	**100.00%**	**-**	**166**	**100.00%**	**-**	**89**	**100.00%**	**-**	**58**	**100.00%**	**-**

Appendix B Quantitative Retail Spreadsheets

Table CM1
Population projections

	2012 persons	2013 persons	2014 persons	2015 persons	2016 persons	2017 persons	2018 persons	2019 persons	2020 persons	2021 persons	2022 persons	2023 persons	2024 persons	2025 persons	2026 persons	2027 persons	2028 persons	2029 persons	2030 persons	2031 persons	*Change* persons
Zone 1	51,420	51,577	51,760	51,954	52,170	52,393	52,635	52,887	53,160	53,452	53,742	54,033	54,328	54,621	54,864	55,155	55,391	55,680	55,918	56,155	*4,735*
Zone 2	17,357	17,417	17,492	17,575	17,661	17,750	17,846	17,945	18,047	18,155	18,261	18,369	18,476	18,582	18,676	18,783	18,876	18,982	19,075	19,165	*1,808*
Zone 3	16,156	16,209	16,282	16,362	16,446	16,533	16,624	16,719	16,816	16,915	17,015	17,115	17,216	17,316	17,406	17,507	17,598	17,698	17,788	17,877	*1,721*
Zone 4	6,074	6,092	6,114	6,138	6,163	6,189	6,215	6,243	6,273	6,306	6,341	6,376	6,411	6,447	6,473	6,506	6,532	6,566	6,591	6,617	*543*
Zone 5	11,053	11,182	11,311	11,440	11,563	11,687	11,808	11,931	12,051	12,169	12,290	12,407	12,520	12,620	12,718	12,810	12,900	12,981	13,071	13,151	*2,098*
Zone 6	14,412	14,458	14,516	14,574	14,637	14,702	14,773	14,847	14,927	15,009	15,092	15,176	15,261	15,346	15,419	15,501	15,570	15,652	15,722	15,792	*1,380*
Zone 7	9,244	9,297	9,350	9,404	9,458	9,513	9,564	9,618	9,676	9,736	9,793	9,848	9,900	9,954	10,003	10,056	10,106	10,156	10,205	10,254	*1,010*
Total	**125,716**	**126,232**	**126,825**	**127,447**	**128,098**	**128,767**	**129,465**	**130,190**	**130,950**	**131,742**	**132,534**	**133,324**	**134,112**	**134,886**	**135,559**	**136,318**	**136,973**	**137,715**	**138,370**	**139,011**	***13,295***

Source: Experian MMG

Table CM2
Per capita expenditure projections

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	*Change*
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Zone 1	2,491	2,568	2,650	2,711	2,787	2,871	2,957	3,045	3,137	3,228	3,321	3,418	3,517	3,619	3,724	3,832	3,943	4,057	4,175	4,296	*1,805*
Zone 2	3,305	3,408	3,517	3,598	3,698	3,809	3,924	4,041	4,163	4,283	4,408	4,535	4,667	4,802	4,942	5,085	5,232	5,384	5,540	5,701	*2,396*
Zone 3	2,992	3,085	3,183	3,257	3,348	3,448	3,552	3,658	3,768	3,877	3,990	4,105	4,225	4,347	4,473	4,603	4,736	4,874	5,015	5,160	*2,168*
Zone 4	3,921	4,042	4,171	4,267	4,387	4,518	4,654	4,794	4,937	5,081	5,228	5,380	5,536	5,696	5,861	6,031	6,206	6,386	6,571	6,762	*2,841*
Zone 5	3,645	3,758	3,878	3,967	4,079	4,201	4,327	4,457	4,590	4,724	4,861	5,001	5,147	5,296	5,449	5,607	5,770	5,937	6,110	6,287	*2,642*
Zone 6	3,556	3,666	3,783	3,870	3,978	4,098	4,221	4,347	4,478	4,608	4,741	4,879	5,020	5,166	5,316	5,470	5,628	5,792	5,960	6,132	*2,577*
Zone 7	4,101	4,228	4,363	4,463	4,588	4,726	4,868	5,014	5,164	5,314	5,468	5,627	5,790	5,958	6,131	6,308	6,491	6,680	6,873	7,073	*2,972*

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 11, October 2013, Figures 1a and 1b):

2012-13: 3.10%
2013-14: 3.20%
2014-15: 2.30%
2015-16: 2.80%
2016-20: 3.00% (per annum)
2020-31: 2.90% (per annum)

Source: Experian MMG3 (2012 data in 2012 prices). All monetary values are held constant at 2012 prices.

Highlight denotes interval year for retail capacity assessment

Table CM3
Total comparison goods expenditure

	Zone 1 Folkestone	Zone 2 Hythe	Zone 3 New Romney	Zone 4 Lydd	Zone 5 Sellinge	Zone 6 Hawkinge	Zone 7 Rural North	Total
2014 (£m)	137.17	61.52	51.83	25.50	43.87	54.91	40.79	415.60
Less SFT (%)	11.60%	11.60%	11.60%	11.60%	11.60%	11.60%	11.60%	
Less SFT (£m)	15.91	7.14	6.01	2.96	5.09	6.37	4.73	48.21
Residual at 2014 (£m)	**121.26**	**54.38**	**45.82**	**22.55**	**38.78**	**48.54**	**36.06**	**367.39**
2017 (£m)	150.39	67.62	57.01	27.96	49.10	60.25	44.96	457.29
Less SFT (%)	13.80%	13.80%	13.80%	13.80%	13.80%	13.80%	13.80%	
Less SFT (£m)	20.75	9.33	7.87	3.86	6.78	8.31	6.20	63.11
Residual at 2017 (£m)	**129.64**	**58.29**	**49.14**	**24.11**	**42.32**	**51.93**	**38.75**	**394.18**
2021 (£m)	172.52	77.76	65.59	32.04	57.48	69.16	51.74	526.29
Less SFT (%)	15.70%	15.70%	15.70%	15.70%	15.70%	15.70%	15.70%	
Less SFT (£m)	27.09	12.21	10.30	5.03	9.02	10.86	8.12	82.63
Residual at 2021 (£m)	**145.44**	**65.56**	**55.29**	**27.01**	**48.46**	**58.30**	**43.61**	**443.66**
2026 (£m)	204.29	92.29	77.86	37.94	69.31	81.96	61.32	624.97
Less SFT (%)	15.90%	15.90%	15.90%	15.90%	15.90%	15.90%	15.90%	
Less SFT (£m)	32.48	14.67	12.38	6.03	11.02	13.03	9.75	99.37
Residual at 2026 (£m)	**171.81**	**77.61**	**65.48**	**31.91**	**58.29**	**68.93**	**51.57**	**525.60**
2031 (£m)	241.23	109.26	92.25	44.74	82.68	96.84	72.52	739.52
Less SFT (%)	15.90%	15.90%	15.90%	15.90%	15.90%	15.90%	15.90%	
Less SFT (£m)	38.36	17.37	14.67	7.11	13.15	15.40	11.53	117.58
Residual at 2031 (£m)	**202.87**	**91.89**	**77.58**	**37.63**	**69.53**	**81.44**	**60.99**	**621.94**
Change, 2014-31	**81.62**	**37.50**	**31.76**	**15.08**	**30.75**	**32.90**	**24.93**	**254.55**

Notes
Source: Table CM1, Table CM2
Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 11, October 2013, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods). The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices.

Table CM4
Comparison goods market shares, 2014

	Zone 1 Folkestone %	Zone 2 Hythe %	Zone 3 New Romney %	Zone 4 Lydd %	Zone 5 Sellinge %	Zone 6 Hawkinge %	Zone 7 Rural North %
Centres in zone 1							
Folkestone town centre	50.71%	28.06%	13.30%	8.87%	4.48%	34.37%	6.70%
Park Farm retail stores (incl Sainsbury's)	20.09%	15.00%	7.29%	1.89%	3.31%	22.40%	2.25%
Cheriton (incl Tesco Extra)	4.48%	2.64%	0.40%	0.01%	0.82%	3.94%	1.17%
Other locations, zone 1	0.29%	0.20%	0.28%	0.03%	0.04%	0.18%	0.00%
Total, zone 1	**75.58%**	**45.90%**	**21.27%**	**10.80%**	**8.65%**	**60.89%**	**10.12%**
Centres in zone 2							
Hythe town centre (incl Sainsbury's)	1.46%	17.52%	4.46%	1.79%	1.46%	1.56%	0.55%
Total, zone 2	**1.46%**	**17.52%**	**4.46%**	**1.79%**	**1.46%**	**1.56%**	**0.55%**
Centres in zone 3							
New Romney town centre (incl Sainsbury's)	0.01%	0.12%	8.80%	5.42%	0.00%	0.03%	0.00%
Other centres, zone 3	0.00%	0.00%	1.65%	0.33%	0.07%	0.00%	0.00%
Total, zone 3	**0.01%**	**0.12%**	**10.45%**	**5.75%**	**0.07%**	**0.03%**	**0.00%**
Centres in zone 4							
Lydd	0.00%	0.00%	0.00%	2.30%	0.00%	0.00%	0.02%
Total, zone 4	**0.00%**	**0.00%**	**0.00%**	**2.30%**	**0.00%**	**0.00%**	**0.02%**
Centres in zone 5							
All centres	0.00%	0.00%	0.00%	0.45%	1.09%	0.00%	0.00%
Total, zone 5	**0.00%**	**0.00%**	**0.00%**	**0.45%**	**1.09%**	**0.00%**	**0.00%**
Centres in zone 6							
All centres	0.05%	0.00%	0.00%	0.00%	0.02%	0.63%	0.14%
Total, zone 6	**0.05%**	**0.00%**	**0.00%**	**0.00%**	**0.02%**	**0.63%**	**0.14%**
Centres in zone 7							
All centres	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.41%
Total, zone 7	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.41%**
Total for study area	**77.10%**	**63.54%**	**36.19%**	**21.10%**	**11.29%**	**63.11%**	**11.25%**
Centres outside study area							
Ashford							
Town centre	2.95%	8.34%	31.82%	28.77%	33.63%	6.25%	8.43%
Retail parks/supermarkets	1.16%	3.14%	13.46%	10.78%	21.58%	1.31%	2.55%
Ashford Designer Outlet	1.44%	3.51%	3.30%	4.47%	6.41%	2.08%	1.13%
Total, Ashford	**5.56%**	**14.99%**	**48.59%**	**44.02%**	**61.62%**	**9.63%**	**12.10%**
Canterbury							
Canterbury city centre	9.60%	12.89%	5.82%	3.29%	13.44%	21.48%	48.04%
Retail parks/supermarkets	1.44%	1.77%	0.36%	0.91%	2.09%	1.65%	5.37%
Total, Canterbury	**11.04%**	**14.65%**	**6.18%**	**4.21%**	**15.53%**	**23.13%**	**53.42%**
Dover							
Dover town centre	0.63%	0.33%	0.00%	0.29%	0.08%	1.20%	11.85%
Retail parks/supermarkets/De Bradelei Wharf	0.17%	0.17%	0.17%	0.00%	0.00%	0.26%	1.37%
Total, Dover	**0.80%**	**0.50%**	**0.17%**	**0.29%**	**0.08%**	**1.45%**	**13.22%**
Other centres							
Central London / West End	1.13%	1.65%	1.20%	0.92%	1.68%	0.48%	1.49%
Hastings Town Centre	0.00%	0.00%	0.66%	12.40%	0.53%	0.17%	0.00%
Bluewater Shopping Centre	0.56%	0.50%	2.71%	0.52%	1.34%	0.14%	1.92%
Lakeside Shopping Centre	0.69%	1.80%	1.11%	0.38%	0.82%	0.43%	0.38%
Rye Town Centre	0.03%	0.00%	0.36%	6.46%	0.02%	0.00%	0.24%
Maidstone town centre, retail parks and supermarket	0.58%	0.25%	1.17%	1.68%	1.49%	0.27%	0.29%
Other centres outside study area	2.52%	2.13%	1.66%	8.03%	5.61%	1.18%	5.70%
Total for outside study area	**22.90%**	**36.46%**	**63.81%**	**78.90%**	**88.71%**	**36.89%**	**88.75%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research household survey, May 2014

Table CM5
Comparison goods spending patterns, 2014

	Zone 1 Folkestone	Zone 2 Hythe	Zone 3 New Romney	Zone 4 Lydd	Zone 5 Sellinge	Zone 6 Hawkinge	Zone 7 Rural North	Total	Total
	£m	£m	£m	£m	£m	£m	£m	£m	%
Total available expenditure	121.26	54.38	45.82	22.55	38.78	48.54	36.06	367.39	-
Centres in zone 1									
Folkestone town centre	61.49	15.26	6.10	2.00	1.74	16.69	2.42	105.68	28.77%
Park Farm retail stores (incl Sainsbury's)	24.36	8.16	3.34	0.43	1.28	10.87	0.81	49.26	13.41%
Cheriton (incl Tesco Extra)	5.43	1.44	0.18	0.00	0.32	1.91	0.42	9.71	2.64%
Other locations, zone 1	0.35	0.11	0.13	0.01	0.02	0.09	0.00	0.70	0.19%
Total, zone 1	**91.64**	**24.96**	**9.75**	**2.43**	**3.36**	**29.56**	**3.65**	**165.35**	**45.01%**
Centres in zone 2									
Hythe town centre (incl Sainsbury's)	1.78	9.53	2.05	0.40	0.57	0.76	0.20	15.27	4.16%
Total, zone 2	**1.78**	**9.53**	**2.05**	**0.40**	**0.57**	**0.76**	**0.20**	**15.27**	**4.16%**
Centres in zone 3									
New Romney town centre (incl Sainsbury's)	0.01	0.06	4.03	1.22	0.00	0.01	0.00	5.34	1.45%
Other centres, zone 3	0.00	0.00	0.76	0.08	0.03	0.00	0.00	0.86	0.23%
Total, zone 3	**0.01**	**0.06**	**4.79**	**1.30**	**0.03**	**0.01**	**0.00**	**6.20**	**1.69%**
Centres in zone 4									
Lydd	0.00	0.00	0.00	0.52	0.00	0.00	0.01	0.53	0.14%
Total, zone 4	**0.00**	**0.00**	**0.00**	**0.52**	**0.00**	**0.00**	**0.01**	**0.53**	**0.14%**
Centres in zone 5									
All centres	0.00	0.00	0.00	0.10	0.42	0.00	0.00	0.52	0.14%
Total, zone 5	**0.00**	**0.00**	**0.00**	**0.10**	**0.42**	**0.00**	**0.00**	**0.52**	**0.14%**
Centres in zone 6									
All centres	0.07	0.00	0.00	0.00	0.01	0.31	0.05	0.43	0.12%
Total, zone 6	**0.07**	**0.00**	**0.00**	**0.00**	**0.01**	**0.31**	**0.05**	**0.43**	**0.12%**
Centres in zone 7									
All centres	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.15	0.04%
Total, zone 7	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.15**	**0.15**	**0.04%**
Total for study area	**93.49**	**34.55**	**16.58**	**4.76**	**4.38**	**30.64**	**4.06**	**188.45**	**51.29%**
Centres outside study area									
Ashford									
Town centre	3.58	4.53	14.58	6.49	13.04	3.03	3.04	48.29	13.15%
Retail parks/supermarkets	1.41	1.71	6.17	2.43	8.37	0.63	0.92	21.64	5.89%
Ashford Designer Outlet	1.75	1.91	1.51	1.01	2.49	1.01	0.41	10.08	2.74%
Total, Ashford	**6.74**	**8.15**	**22.26**	**9.92**	**23.90**	**4.68**	**4.37**	**80.01**	**21.78%**
Canterbury									
Canterbury city centre	11.64	7.01	2.67	0.74	5.21	10.43	17.33	55.03	14.98%
Retail parks/supermarkets	1.75	0.96	0.16	0.21	0.81	0.80	1.94	6.63	1.80%
Total, Canterbury	**13.39**	**7.97**	**2.83**	**0.95**	**6.02**	**11.23**	**19.26**	**61.65**	**16.78%**
Dover									
Dover town centre	0.77	0.18	0.00	0.07	0.03	0.58	4.27	5.90	1.61%
Retail parks/supermarkets/De Bradelei Wharf	0.20	0.09	0.08	0.00	0.00	0.13	0.49	0.99	0.27%
Total, Dover	**0.97**	**0.27**	**0.08**	**0.07**	**0.03**	**0.71**	**4.77**	**6.89**	**1.87%**
Other centres									
Central London / West End	1.37	0.90	0.55	0.21	0.65	0.23	0.54	4.45	1.21%
Hastings Town Centre	0.00	0.00	0.30	2.80	0.21	0.08	0.00	3.39	0.92%
Bluewater Shopping Centre	0.68	0.27	1.24	0.12	0.52	0.07	0.69	3.58	0.98%
Lakeside Shopping Centre	0.84	0.98	0.51	0.09	0.32	0.21	0.14	3.07	0.84%
Rye Town Centre	0.03	0.00	0.16	1.46	0.01	0.00	0.09	1.75	0.48%
Maidstone town centre, retail parks and supermarket	0.70	0.13	0.54	0.38	0.58	0.13	0.10	2.56	0.70%
Other centres outside study area	3.06	1.16	0.76	1.81	2.17	0.57	2.06	11.59	3.15%
Total for outside study area	**27.77**	**19.83**	**29.24**	**17.79**	**34.40**	**17.91**	**32.01**	**178.94**	**48.71%**
Overall total	**121.26**	**54.38**	**45.82**	**22.55**	**38.78**	**48.54**	**36.06**	**367.39**	**100.00%**

Source: Table CM3, Table CM4
All monetary values are held constant at 2012 prices.

Table CM6
Comparison goods floorspace capacity (baseline)

			2014	2017	2021	2026	2031
Total population and expenditure							
A	Total population	Persons	126,825	128,767	131,742	135,559	139,011
B	Total comparison goods expenditure	£m	367.39	394.18	443.66	525.60	621.94
Retained expenditure							
C	Retained comparison goods expenditure in Shepway District	%	51%	51%	51%	51%	51%
D	Retained comparison goods expenditure in Shepway District(1)	£m	187.78	201.47	226.76	268.64	317.88
E	Comparison goods expenditure leakage	£m	179.61	192.71	216.90	256.96	304.06
Inflow							
F	Inflow(2)	%	15%	15%	15%	15%	15%
G	Inflow(2)	£m	15.85	17.01	19.14	22.68	26.84
Total turnover							
H	Baseline comparison goods turnover of stores	£m	203.63	203.63	203.63	203.63	203.63
Initial surplus							
I	Growth in retained comparison goods expenditure	£m	0.00	14.85	42.27	87.69	141.09
Claims on expenditure							
J	Sales efficiency growth in existing retailers(3)	£m	0.00	9.30	22.37	39.83	58.65
K	Comparison goods commitments	£m	0.00	0.00	0.00	0.00	0
L	Total claims on capacity	£m	0.00	9.30	22.37	39.83	58.65
Expenditure summary							
M	Initial surplus of comparison goods expenditure	£m	0.00	14.85	42.27	87.69	141.09
N	Total claims on capacity	£m	0.00	9.30	22.37	39.83	58.65
O	Residual comparison goods expenditure	£m	0.00	5.55	19.91	47.86	82.44
Conversion to floorspace need							
P	Assumed turnover per sq.m(4)	£	5,000	5,228	5,549	5,978	6,440
Q	**Comparison goods floorspace need(5)(6)**	**sq.m net**	**0**	**1,061**	**3,587**	**8,005**	**12,801**
R	Comparison goods floorspace need(6)	sq.m gross	0	1,516	5,125	11,436	18,287

1 Total comparison goods expenditure retained by stores in Shepway District (stores in zones 1, 2, 3, 4 and 6 of study area).
2 Inflow applied to turnover of Folkestone town centre only. Proportion derived from findings of on-street visitor survey, May 2014.
3 Sales efficiency growth of 1.5% per annum applied.
4 Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2026 in line with sales effiency growth rates shown in Note 3.
5 Total requirement shown is cumulative.
6 Total requirement shown is cumulative. Gross: net ratio of 70% applied.

All monetary values are held constant at 2012 prices.

Table CV1
Population projections

	2012 persons	2013 persons	2014 persons	2015 persons	2016 persons	2017 persons	2018 persons	2019 persons	2020 persons	2021 persons	2022 persons	2023 persons	2024 persons	2025 persons	2026 persons	2027 persons	2028 persons	2029 persons	2030 persons	2031 persons	*Change* persons
Zone 1	51,420	51,577	51,760	51,954	52,170	52,393	52,635	52,887	53,160	53,452	53,742	54,033	54,328	54,621	54,864	55,155	55,391	55,680	55,918	56,155	*4,735*
Zone 2	17,357	17,417	17,492	17,575	17,661	17,750	17,846	17,945	18,047	18,155	18,261	18,369	18,476	18,582	18,676	18,783	18,876	18,982	19,075	19,165	*1,808*
Zone 3	16,156	16,209	16,282	16,362	16,446	16,533	16,624	16,719	16,816	16,915	17,015	17,115	17,216	17,316	17,406	17,507	17,598	17,698	17,788	17,877	*1,721*
Zone 4	6,074	6,092	6,114	6,138	6,163	6,189	6,215	6,243	6,273	6,306	6,341	6,376	6,411	6,447	6,473	6,506	6,532	6,566	6,591	6,617	*543*
Zone 5	11,053	11,182	11,311	11,440	11,563	11,687	11,808	11,931	12,051	12,169	12,290	12,407	12,520	12,620	12,718	12,810	12,900	12,981	13,071	13,151	*2,098*
Zone 6	14,412	14,458	14,516	14,574	14,637	14,702	14,773	14,847	14,927	15,009	15,092	15,176	15,261	15,346	15,419	15,501	15,570	15,652	15,722	15,792	*1,380*
Zone 7	9,244	9,297	9,350	9,404	9,458	9,513	9,564	9,618	9,676	9,736	9,793	9,848	9,900	9,954	10,003	10,056	10,106	10,156	10,205	10,254	*1,010*
Total	**125,716**	**126,232**	**126,825**	**127,447**	**128,098**	**128,767**	**129,465**	**130,190**	**130,950**	**131,742**	**132,534**	**133,324**	**134,112**	**134,886**	**135,559**	**136,318**	**136,973**	**137,715**	**138,370**	**139,011**	***13,295***

Source: Experian MMG

Table CM2
Per capita expenditure projections

	2012 £	2013 £	2014 £	2015 £	2016 £	2017 £	2018 £	2019 £	2020 £	2021 £	2022 £	2023 £	2024 £	2025 £	2026 £	2027 £	2028 £	2029 £	2030 £	2031 £	*Change* £
Zone 1	1,847	1,836	1,825	1,820	1,821	1,836	1,851	1,865	1,880	1,895	1,911	1,926	1,941	1,957	1,972	1,988	2,004	2,020	2,036	2,053	*205*
Zone 2	2,209	2,196	2,183	2,176	2,179	2,196	2,214	2,231	2,249	2,267	2,285	2,303	2,322	2,340	2,359	2,378	2,397	2,416	2,436	2,455	*246*
Zone 3	2,179	2,165	2,152	2,146	2,148	2,165	2,183	2,200	2,218	2,235	2,253	2,271	2,290	2,308	2,326	2,345	2,364	2,383	2,402	2,421	*242*
Zone 4	2,776	2,759	2,742	2,734	2,737	2,759	2,781	2,803	2,825	2,848	2,871	2,894	2,917	2,940	2,964	2,988	3,011	3,035	3,060	3,084	*309*
Zone 5	2,343	2,329	2,315	2,308	2,311	2,329	2,348	2,367	2,385	2,405	2,424	2,443	2,463	2,482	2,502	2,522	2,543	2,563	2,583	2,604	*261*
Zone 6	2,273	2,259	2,246	2,239	2,241	2,259	2,277	2,296	2,314	2,332	2,351	2,370	2,389	2,408	2,427	2,447	2,466	2,486	2,506	2,526	*253*
Zone 7	2,542	2,527	2,512	2,504	2,507	2,527	2,547	2,567	2,588	2,608	2,629	2,650	2,672	2,693	2,714	2,736	2,758	2,780	2,802	2,825	*283*

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 11, October 2013, Figures 1a and 1b):

2012-13: -0.60%
2013-14: -0.60%
2014-15: -0.30%
2015-16: 0.10%
2016-20: 0.80% (per annum)
2020-31: 0.80% (per annum)

Source: Experian MMG3 (2012 data in 2012 prices). All monetary values are held constant at 2012 prices.

Highlight denotes interval year for retail capacity assessment

Table CV3
Total convenience goods expenditure

	Zone 1 Folkestone	Zone 2 Hythe	Zone 3 New Romney	Zone 4 Lydd	Zone 5 Sellinge	Zone 6 Hawkinge	Zone 7 Rural North	Total
2014 (£m)	94.47	38.18	35.05	16.77	26.19	32.60	23.48	266.73
Less SFT (%)	2.70%	2.70%	2.70%	2.70%	2.70%	2.70%	2.70%	
Less SFT (£m)	2.55	1.03	0.95	0.45	0.71	0.88	0.63	7.20
Residual at 2014 (£m)	**91.91**	**37.15**	**34.10**	**16.31**	**25.48**	**31.72**	**22.85**	**259.53**
2017 (£m)	96.19	38.98	35.80	17.07	27.22	33.22	24.04	272.52
Less SFT (%)	3.50%	3.50%	3.50%	3.50%	3.50%	3.50%	3.50%	
Less SFT (£m)	3.37	1.36	1.25	0.60	0.95	1.16	0.84	9.54
Residual at 2017 (£m)	**92.83**	**37.61**	**34.55**	**16.48**	**26.27**	**32.05**	**23.19**	**262.98**
2021 (£m)	101.32	41.16	37.81	17.96	29.26	35.01	25.40	287.91
Less SFT (%)	4.60%	4.60%	4.60%	4.60%	4.60%	4.60%	4.60%	
Less SFT (£m)	4.66	1.89	1.74	0.83	1.35	1.61	1.17	13.24
Residual at 2021 (£m)	**96.65**	**39.27**	**36.07**	**17.13**	**27.92**	**33.40**	**24.23**	**274.67**
2026 (£m)	108.22	44.06	40.49	19.18	31.82	37.43	27.15	308.36
Less SFT (%)	5.10%	5.10%	5.10%	5.10%	5.10%	5.10%	5.10%	
Less SFT (£m)	5.52	2.25	2.07	0.98	1.62	1.91	1.38	15.73
Residual at 2026 (£m)	**102.70**	**41.81**	**38.43**	**18.21**	**30.20**	**35.52**	**25.77**	**292.63**
2031 (£m)	115.27	47.05	43.28	20.41	34.25	39.89	28.97	329.10
Less SFT (%)	5.10%	5.10%	5.10%	5.10%	5.10%	5.10%	5.10%	
Less SFT (£m)	5.88	2.40	2.21	1.04	1.75	2.03	1.48	16.78
Residual at 2031 (£m)	**109.39**	**44.65**	**41.07**	**19.37**	**32.50**	**37.85**	**27.49**	**312.32**
Change, 2014-31	**17.47**	**7.50**	**6.97**	**3.05**	**7.02**	**6.13**	**4.64**	**52.79**

Notes
Source: Table CV1, Table CV2
Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 11, October 2013, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods). The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices.

Table CV4
Convenience goods market shares, 2014

	Zone 1 Folkestone	Zone 2 Hythe	Zone 3 New Romney	Zone 4 Lydd	Zone 5 Sellinge	Zone 6 Hawkinge	Zone 7 Rural North
	%	%	%	%	%	%	%
Foodstores in zone 1							
Folkestone town centre							
Asda, Bouverie Place, Folkestone	14.46%	3.03%	3.64%	0.00%	0.72%	6.14%	0.26%
Sainsbury's, Bouverie Road West, Folkestone	7.58%	0.00%	0.75%	0.88%	1.48%	8.59%	1.07%
Lidl, Shellons Street, Folkestone	2.00%	0.00%	0.25%	0.00%	0.00%	1.23%	0.51%
Other foodstores, Folkestone town centre	3.15%	0.00%	0.76%	0.00%	0.00%	1.68%	0.28%
Sub-total, Folkestone town centre	***27.19%***	***3.03%***	***5.40%***	***0.88%***	***2.19%***	***17.64%***	***2.11%***
Out-of-centre superstores							
Tesco Extra, Cheriton High Street, Cheriton	17.64%	6.80%	4.20%	1.50%	2.01%	17.06%	4.50%
Sainsbury's, West Park Farm, Folkestone	17.33%	2.60%	1.36%	0.29%	0.15%	18.49%	4.37%
Morrisons, Cheriton Road, Folkestone	19.50%	2.90%	3.51%	0.00%	1.17%	9.97%	1.28%
Cheriton							
Local shops, Cheriton	1.07%	0.00%	0.00%	0.00%	0.00%	0.17%	0.15%
Marks & Spencer Simply Food, Cheriton High Street, Folkeston	0.03%	1.42%	0.00%	0.00%	0.00%	0.48%	0.16%
Co-Operative, High Street, Cheriton, Folkestone	0.46%	0.00%	0.00%	0.00%	0.00%	0.00%	0.28%
Other foodstores, zone 1	6.90%	0.44%	0.57%	0.00%	0.54%	4.18%	0.86%
Total, zone 1	**90.12%**	**17.19%**	**15.05%**	**2.67%**	**6.06%**	**67.99%**	**13.71%**
Foodstores in zone 2							
Hythe							
Sainsbury's, Military Road, Hythe	0.80%	41.45%	17.23%	2.09%	1.47%	0.77%	0.62%
Waitrose, Prospect Road, Hythe	1.88%	18.92%	2.53%	0.10%	4.41%	2.16%	3.34%
Aldi, High Street, Hythe	1.03%	12.15%	5.49%	0.77%	3.36%	1.14%	0.69%
Iceland, High Street, Hythe	0.21%	1.43%	0.26%	0.29%	0.15%	0.00%	0.00%
Other foodstores, Hythe	0.16%	4.18%	1.06%	0.07%	0.19%	0.64%	0.12%
Sub-total, Hythe town centre	***4.08%***	***78.13%***	***26.56%***	***3.33%***	***9.58%***	***4.72%***	***4.77%***
Other foodstores, zone 2	0.00%	0.62%	0.00%	0.29%	0.15%	0.00%	0.00%
Total, zone 2	**4.08%**	**78.74%**	**26.56%**	**3.63%**	**9.73%**	**4.72%**	**4.77%**
Foodstores in zone 3							
Sainsbury's, Dymchurch Road, New Romney	0.00%	0.00%	31.64%	26.26%	0.26%	0.00%	0.00%
Other foodstores, New Romney	0.07%	0.00%	4.05%	1.41%	0.00%	0.19%	0.00%
All foodstores, Dymchurch	0.00%	0.43%	1.85%	0.00%	0.00%	0.00%	0.00%
Other foodstores, zone 3	0.00%	0.00%	2.39%	0.61%	0.00%	0.00%	0.00%
Total, zone 3	**0.07%**	**0.43%**	**39.94%**	**28.27%**	**0.26%**	**0.19%**	**0.00%**
Foodstores in zone 4							
All foodstores, zone 4	0.00%	0.00%	0.00%	2.38%	0.00%	0.00%	0.00%
Total, zone 4	**0.00%**	**0.00%**	**0.00%**	**2.38%**	**0.00%**	**0.00%**	**0.00%**
Foodstores in zone 5							
Co-Operative, Main Road, Sellindge	0.00%	0.39%	0.00%	0.00%	4.05%	0.00%	0.00%
Other foodstores, Sellindge	0.13%	0.00%	0.21%	0.00%	3.06%	0.00%	0.23%
Other foodstores, zone 5	0.00%	0.10%	0.00%	0.00%	2.62%	0.09%	0.15%
Total, zone 5	**0.13%**	**0.49%**	**0.21%**	**0.00%**	**9.72%**	**0.09%**	**0.38%**
Foodstores in zone 6							
Hawkinge							
Lidl, Haven Drive, Hawkinge	2.00%	0.06%	0.24%	0.55%	0.00%	14.53%	2.43%
Tesco Express, Canterbury Road, Hawkinge	0.00%	0.00%	0.38%	0.00%	1.02%	1.93%	0.00%
Other foodstores, Hawkinge	0.00%	0.00%	0.00%	0.00%	0.00%	1.17%	0.00%
Sub-total, Hawkinge	***2.00%***	***0.06%***	***0.62%***	***0.55%***	***1.02%***	***17.63%***	***2.43%***
Other foodstores, zone 6	0.02%	0.00%	0.00%	0.00%	0.13%	1.19%	0.08%
Total, zone 6	**2.02%**	**0.06%**	**0.62%**	**0.55%**	**1.14%**	**18.82%**	**2.51%**
Foodstores in zone 7							
All foodstores, zone 7	0.00%	0.00%	0.00%	0.00%	0.63%	0.00%	3.14%
Total, zone 7	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.63%**	**0.00%**	**3.14%**
Total for study area	**96.42%**	**96.91%**	**82.39%**	**37.51%**	**27.56%**	**91.81%**	**24.50%**
Foodstores outside study area							
Ashford							
Tesco Extra, Hythe Road, Crooksfoot, Ashford	0.07%	1.73%	7.33%	8.93%	32.87%	0.00%	7.30%
Tesco, Moatfield Meadow, Kingsnorth, Ashford	0.33%	0.00%	5.58%	6.06%	19.00%	0.12%	0.00%
Sainsbury's, Simone Well Avenue, Bybrook, Ashford	0.83%	0.32%	1.51%	1.20%	8.03%	0.49%	7.67%
Asda, Kimberley Way, Ashford	0.00%	0.00%	1.68%	7.40%	3.74%	0.62%	0.36%
Waitrose, Repton Park, Ashford	0.00%	0.00%	0.38%	0.00%	3.19%	0.00%	2.97%
Other foodstores, Ashford	0.08%	0.09%	0.07%	0.00%	2.05%	0.00%	0.32%
Total, Ashford	**1.32%**	**2.14%**	**16.55%**	**23.59%**	**68.88%**	**1.23%**	**18.62%**
Canterbury							
Morrisons, Ten Perch Road, Canterbury	0.21%	0.00%	0.00%	0.00%	0.00%	0.00%	11.23%
Sainsbury's, Kingsmead Road, Canterbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.28%
Waitrose, St George Centre, Canterbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.46%
Other foodstores, Canterbury	0.08%	0.06%	0.00%	0.10%	0.70%	0.89%	3.32%
Total, Canterbury	**0.29%**	**0.06%**	**0.00%**	**0.10%**	**0.70%**	**0.89%**	**23.30%**
Dover							
Tesco Extra, White Cliffs Park, Dover	0.61%	0.00%	0.00%	0.00%	0.83%	0.00%	9.64%
Morrisons, Bridge Street, Dover	0.10%	0.00%	0.00%	0.29%	0.00%	1.25%	8.23%
Aldi, Cherry Tree Avenue, Dover	0.44%	0.00%	0.51%	0.00%	0.00%	2.19%	5.10%
Other foodstores, Dover	0.15%	0.12%	0.24%	0.00%	0.00%	0.83%	1.78%
Total, Dover	**1.30%**	**0.12%**	**0.75%**	**0.29%**	**0.83%**	**4.27%**	**24.76%**
Rye							
Jempsons Budgens, Station Approach, Rye	0.00%	0.00%	0.12%	17.01%	0.54%	0.00%	0.00%
Other foodstores, Rye	0.00%	0.00%	0.09%	2.48%	0.07%	0.00%	0.00%
Total, Rye	**0.00%**	**0.00%**	**0.20%**	**19.49%**	**0.61%**	**0.00%**	**0.00%**
Tenterden (all foodstores)	0.00%	0.71%	0.00%	3.94%	1.00%	0.40%	0.53%
Other foodstores	0.68%	0.06%	0.11%	15.07%	0.42%	1.39%	8.29%
Total for outside study area	**3.58%**	**3.09%**	**17.61%**	**62.49%**	**72.44%**	**8.19%**	**75.50%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey results, May 2014

Table CV5
Convenience goods spending patterns, 2014

	Zone 1 Folkestone	Zone 2 Hythe	Zone 3 New Romney	Zone 4 Lydd	Zone 5 Sellinge	Zone 6 Hawkinge	Zone 7 Rural North	Total	Total
	£m	£m	£m	£m	£m	£m	£m	£m	%
Total available expenditure	91.91	37.15	34.10	16.31	25.48	31.72	22.85	259.53	-
Foodstores in zone 1									
Folkestone town centre									
Asda, Bouverie Place, Folkestone	13.29	1.13	1.24	0.00	0.18	1.95	0.06	17.85	6.88%
Sainsbury's, Bouverie Road West, Folkestone	6.97	0.00	0.26	0.14	0.38	2.72	0.24	10.71	4.13%
Lidl, Shellons Street, Folkestone	1.84	0.00	0.08	0.00	0.00	0.39	0.12	2.43	0.94%
Other foodstores, Folkestone town centre	2.89	0.00	0.26	0.00	0.00	0.53	0.06	3.75	1.44%
Sub-total, Folkestone town centre	***24.99***	***1.13***	***1.84***	***0.14***	***0.56***	***5.59***	***0.48***	***34.74***	***13.38%***
Out-of-centre superstores									
Tesco Extra, Cheriton High Street, Cheriton	16.21	2.53	1.43	0.24	0.51	5.41	1.03	27.37	10.55%
Sainsbury's, West Park Farm, Folkestone	15.93	0.96	0.46	0.05	0.04	5.86	1.00	24.31	9.37%
Morrisons, Cheriton Road, Folkestone	17.92	1.08	1.20	0.00	0.30	3.16	0.29	23.95	9.23%
Cheriton									
Local shops, Cheriton	0.98	0.00	0.00	0.00	0.00	0.06	0.03	1.07	0.41%
Marks & Spencer Simply Food, Cheriton High Street, Folkestc	0.03	0.53	0.00	0.00	0.00	0.15	0.04	0.75	0.29%
Co-Operative, High Street, Cheriton, Folkestone	0.42	0.00	0.00	0.00	0.00	0.00	0.06	0.49	0.19%
Other foodstores, zone 1	6.34	0.16	0.20	0.00	0.14	1.33	0.20	8.36	3.22%
Total, zone 1	**82.83**	**6.39**	**5.13**	**0.44**	**1.55**	**21.56**	**3.13**	**121.03**	**46.63%**
Foodstores in zone 2									
Hythe									
Sainsbury's, Military Road, Hythe	0.73	15.40	5.87	0.34	0.37	0.25	0.14	23.11	8.90%
Waitrose, Prospect Road, Hythe	1.73	7.03	0.86	0.02	1.12	0.69	0.76	12.21	4.71%
Aldi, High Street, Hythe	0.95	4.51	1.87	0.13	0.86	0.36	0.16	8.84	3.41%
Iceland, High Street, Hythe	0.19	0.53	0.09	0.05	0.04	0.00	0.00	0.89	0.34%
Other foodstores, Hythe	0.15	1.55	0.36	0.01	0.05	0.20	0.03	2.35	0.91%
Sub-total, Hythe town centre	***3.75***	***29.03***	***9.06***	***0.54***	***2.44***	***1.50***	***1.09***	***47.40***	***18.26%***
Other foodstores, zone 2	0.00	0.23	0.00	0.05	0.04	0.00	0.00	0.32	0.12%
Total, zone 2	**3.75**	**29.26**	**9.06**	**0.59**	**2.48**	**1.50**	**1.09**	**47.72**	**18.39%**
Foodstores in zone 3									
Sainsbury's, Dymchurch Road, New Romney	0.00	0.00	10.79	4.28	0.07	0.00	0.00	15.14	5.83%
Other foodstores, New Romney	0.07	0.00	1.38	0.23	0.00	0.06	0.00	1.74	0.67%
All foodstores, Dymchurch	0.00	0.16	0.63	0.00	0.00	0.00	0.00	0.79	0.31%
Other foodstores, zone 3	0.00	0.00	0.82	0.10	0.00	0.00	0.00	0.92	0.35%
Total, zone 3	**0.07**	**0.16**	**13.62**	**4.61**	**0.07**	**0.06**	**0.00**	**18.59**	**7.16%**
Foodstores in zone 4									
All foodstores, zone 4	0.00	0.00	0.00	0.39	0.00	0.00	0.00	0.39	0.15%
Total, zone 4	**0.00**	**0.00**	**0.00**	**0.39**	**0.00**	**0.00**	**0.00**	**0.39**	**0.15%**
Foodstores in zone 5									
Co-Operative, Main Road, Sellindge	0.00	0.14	0.00	0.00	1.03	0.00	0.00	1.17	0.45%
Other foodstores, Sellindge	0.12	0.00	0.07	0.00	0.78	0.00	0.05	1.02	0.39%
Other foodstores, zone 5	0.00	0.04	0.00	0.00	0.67	0.03	0.03	0.77	0.30%
Total, zone 5	**0.12**	**0.18**	**0.07**	**0.00**	**2.48**	**0.03**	**0.09**	**2.96**	**1.14%**
Foodstores in zone 6									
Hawkinge									
Lidl, Haven Drive, Hawkinge	1.84	0.02	0.08	0.09	0.00	4.61	0.56	7.20	2.77%
Tesco Express, Canterbury Road, Hawkinge	0.00	0.00	0.13	0.00	0.26	0.61	0.00	1.00	0.39%
Other foodstores, Hawkinge	0.00	0.00	0.00	0.00	0.00	0.37	0.00	0.37	0.14%
Sub-total, Hawkinge	***1.84***	***0.02***	***0.21***	***0.09***	***0.26***	***5.59***	***0.56***	***8.57***	***3.30%***
Other foodstores, zone 6	0.02	0.00	0.00	0.00	0.03	0.38	0.02	0.45	0.17%
Total, zone 6	**1.86**	**0.02**	**0.21**	**0.09**	**0.29**	**5.97**	**0.57**	**9.02**	**3.48%**
Foodstores in zone 7									
All foodstores, zone 7	0.00	0.00	0.00	0.00	0.16	0.00	0.72	0.88	0.34%
Total, zone 7	**0.00**	**0.00**	**0.00**	**0.00**	**0.16**	**0.00**	**0.72**	**0.88**	**0.34%**
Total for study area	**88.62**	**36.01**	**28.09**	**6.12**	**7.02**	**29.12**	**5.60**	**200.58**	**77.29%**
Foodstores outside study area									
Ashford									
Tesco Extra, Hythe Road, Crooksfoot, Ashford	0.06	0.64	2.50	1.46	8.38	0.00	1.67	14.71	5.67%
Tesco, Moatfield Meadow, Kingsnorth, Ashford	0.31	0.00	1.90	0.99	4.84	0.04	0.00	8.08	3.11%
Sainsbury's, Simone Well Avenue, Bybrook, Ashford	0.77	0.12	0.51	0.20	2.05	0.16	1.75	5.55	2.14%
Asda, Kimberley Way, Ashford	0.00	0.00	0.57	1.21	0.95	0.20	0.08	3.01	1.16%
Waitrose, Repton Park, Ashford	0.00	0.00	0.13	0.00	0.81	0.00	0.68	1.62	0.62%
Other foodstores, Ashford	0.07	0.03	0.02	0.00	0.52	0.00	0.07	0.72	0.28%
Total, Ashford	**1.21**	**0.80**	**5.64**	**3.85**	**17.55**	**0.39**	**4.25**	**33.69**	**12.98%**
Canterbury									
Morrisons, Ten Perch Road, Canterbury	0.19	0.00	0.00	0.00	0.00	0.00	2.57	2.76	1.06%
Sainsbury's, Kingsmead Road, Canterbury	0.00	0.00	0.00	0.00	0.00	0.00	1.21	1.21	0.47%
Waitrose, St George Centre, Canterbury	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.79	0.30%
Other foodstores, Canterbury	0.08	0.02	0.00	0.02	0.18	0.28	0.76	1.34	0.51%
Total, Canterbury	**0.27**	**0.02**	**0.00**	**0.02**	**0.18**	**0.28**	**5.32**	**6.09**	**2.35%**
Dover									
Tesco Extra, White Cliffs Park, Dover	0.56	0.00	0.00	0.00	0.21	0.00	2.20	2.97	1.15%
Morrisons, Bridge Street, Dover	0.10	0.00	0.00	0.05	0.00	0.40	1.88	2.42	0.93%
Aldi, Cherry Tree Avenue, Dover	0.40	0.00	0.17	0.00	0.00	0.70	1.17	2.44	0.94%
Other foodstores, Dover	0.14	0.04	0.08	0.00	0.00	0.26	0.41	0.93	0.36%
Total, Dover	**1.19**	**0.04**	**0.26**	**0.05**	**0.21**	**1.36**	**5.66**	**8.76**	**3.38%**
Rye									
Jempsons Budgens, Station Approach, Rye	0.00	0.00	0.04	2.78	0.14	0.00	0.00	2.95	1.14%
Other foodstores, Rye	0.00	0.00	0.03	0.41	0.02	0.00	0.00	0.45	0.17%
Total, Rye	**0.00**	**0.00**	**0.07**	**3.18**	**0.15**	**0.00**	**0.00**	**3.40**	**1.31%**
Tenterden (all foodstores)	0.00	0.26	0.00	0.64	0.25	0.13	0.12	1.41	0.54%
Other foodstores	0.62	0.02	0.04	2.46	0.11	0.44	1.89	5.59	2.15%
Total for outside study area	**3.29**	**1.15**	**6.01**	**10.19**	**18.46**	**2.60**	**17.25**	**58.95**	**22.71%**
Overall total	**91.91**	**37.15**	**34.10**	**16.31**	**25.48**	**31.72**	**22.85**	**259.53**	**100.00%**

Source: Table CV3, Table CV4
All monetary values are held constant at 2012 prices.

Table CV6
Foodstore trading assessment

	Survey-derived turnover from SA £m	Net floorspace sq.m	Convenience floorspace[2] %	Net convenience floorspace sq.m	Average sales density £ / sq.m net	Benchmark turnover £m	Under / over-trading £m
Foodstores in Folkestone town centre							
Asda, Bouverie Place, Folkestone	17.85	5,164	64%	3,305	12,905	42.65	-24.80
Sainsbury's, Bouverie Road West, Folkestone	10.71	2,410	70%	1,687	13,704	23.12	-12.40
Lidl, Shellons Street, Folkestone	2.43	929	80%	743	7,000	5.20	-2.77
Out-of-centre superstores in Folkestone							
Tesco, Cheriton High Street, Cheriton	27.37	3,327	70%	2,329	11,520	26.83	0.54
Sainsbury's, West Park Farm, Folkestone	24.31	4,881	65%	3,173	13,704	43.48	-19.17
Morrisons, Cheriton Road, Folkestone	23.95	2,815	77%	2,168	12,727	27.59	-3.64
Foodstores in Hythe							
Sainsbury's, Military Road, Hythe	23.11	2,841	72%	2,046	13,704	28.03	-4.92
Waitrose, Prospect Road, Hythe	12.21	915	85%	778	11,810	9.19	3.03
Aldi, High Street, Hythe	8.84	844	80%	675	7,000	4.73	4.11
Foodstores in New Romney							
Sainsbury's, Dymchurch Road, New Romney	15.14	1,161	80%	929	13,704	12.73	2.41
Lidl, Haven Drive, Hawkinge	7.20	929	73%	678	7,000	4.75	2.45
Aggregate							**-55.18**

1 Foodstores listed are 'main' food shopping destinations with a meaningful market share, as listed in Table CV4 and Table CV5
2 Foodstores with a net sales area over 500 sq.m are listed.
3 The proportion of convenience floorspace is informed by company average food / non-food splits in Verdict's 2010 UK Grocery Retailers document, updated by PBA through site visits where appropriate.
4 Average sales densities are goods based sales densities derived from Verdict's UK Grocery Retailers Report
5 A positive figure indicates that the store is overtrading compared to company averages.

All monetary values are held constant at 2012 prices.

Table CV7
Convenience goods floorspace capacity (baseline)

			2014	2017	2021	2026	2031
Total population and expenditure							
A	Total population	Persons	126,825	128,767	131,742	135,559	139,011
B	Total convenience goods expenditure	£m	259.53	262.98	274.67	292.63	312.32
Retained expenditure							
C	Retained convenience goods expenditure in Shepway District	%	76%	76%	76%	76%	76%
D	Retained convenience goods expenditure in Shepway District	£m	196.74	199.35	208.22	221.83	236.76
E	Convenience goods expenditure leakage	£m	62.79	63.62	66.45	70.80	75.56
Inflow							
F	Inflow(2)	%	10%	10%	10%	10%	10%
G	Inflow(2)	£m	17.46	17.70	18.48	19.69	21.02
Total turnover							
H	Baseline convenience goods turnover of stores	£m	214.21	214.21	214.21	214.21	214.21
Initial surplus							
I	Growth in retained convenience goods expenditure	£m	0.00	2.84	12.49	27.32	43.57
Claims on expenditure							
J	Sales efficiency growth in existing retailers(3)	£m	0.00	0.64	3.23	6.51	9.84
K	Convenience goods commitments	£m	0.00	0.00	0.00	0.00	0.00
L	Total claims on capacity	£m	0.00	0.64	3.23	6.51	9.84
Expenditure summary							
M	Initial surplus of convenience goods expenditure	£m	0.00	2.84	12.49	27.32	43.57
N	Total claims on capacity	£m	0.00	0.64	3.23	6.51	9.84
O	Allowance for trading performance of existing foodstores	£m	-55.18	-55.18	-55.18	-55.18	-55.18
O	Residual convenience goods expenditure	£m	-55.18	-52.97	-45.92	-34.37	-21.45
Conversion to floorspace need							
P	Assumed turnover per sq.m(4)	£	12,500	12,538	12,689	12,880	13,074
Q	**Convenience goods floorspace need(5)(6)**	**sq.m net**	**-4,414**	**-4,225**	**-3,619**	**-2,668**	**-1,641**
R	Convenience goods floorspace need(6)	sq.m gross	-6,791	-6,500	-5,567	-4,105	-2,524

1 Total convenience goods expenditure retained by stores in Shepway District (stores in zones 1, 2, 3, 4 and 6 of study area).
2 Inflow applied to turnover of main foodstores in Folkestone, Hythe and New Romney only.
3 Sales efficiency growth of 0.3% per annum applied, from 2016 onwards.
4 Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2026 in line with sales effiency growth rates shown in Note 3.
5 Total requirement shown is cumulative.
6 Total requirement shown is cumulative. Gross: net ratio of 65% applied.

All monetary values are held constant at 2012 prices.

Appendix C Quantitative Leisure Spreadsheets

Table LC1
Population projections

	2012 persons	2013 persons	2014 persons	2015 persons	2016 persons	2017 persons	2018 persons	2019 persons	2020 persons	2021 persons	2022 persons	2023 persons	2024 persons	2025 persons	2026 persons	2027 persons	2028 persons	2029 persons	2030 persons	2031 persons	*Change* persons
Zone 1	51,420	51,577	51,760	51,954	52,170	52,393	52,635	52,887	53,160	53,452	53,742	54,033	54,328	54,621	54,864	55,155	55,391	55,680	55,918	56,155	4,735
Zone 2	17,357	17,417	17,492	17,575	17,661	17,750	17,846	17,945	18,047	18,155	18,261	18,369	18,476	18,582	18,676	18,783	18,876	18,982	19,075	19,165	1,808
Zone 3	16,156	16,209	16,282	16,362	16,446	16,533	16,624	16,719	16,816	16,915	17,015	17,115	17,216	17,316	17,406	17,507	17,598	17,698	17,788	17,877	1,721
Zone 4	6,074	6,092	6,114	6,138	6,163	6,189	6,215	6,243	6,273	6,306	6,341	6,376	6,411	6,447	6,473	6,506	6,532	6,566	6,591	6,617	543
Zone 5	11,053	11,182	11,311	11,440	11,563	11,687	11,808	11,931	12,051	12,169	12,290	12,407	12,520	12,620	12,718	12,810	12,900	12,981	13,071	13,151	2,098
Zone 6	14,412	14,458	14,516	14,574	14,637	14,702	14,773	14,847	14,927	15,009	15,092	15,176	15,261	15,346	15,419	15,501	15,570	15,652	15,722	15,792	1,380
Zone 7	9,244	9,297	9,350	9,404	9,458	9,513	9,564	9,618	9,676	9,736	9,793	9,848	9,900	9,954	10,003	10,056	10,106	10,156	10,205	10,254	1,010
Total	125,716	126,232	126,825	127,447	128,098	128,767	129,465	130,190	130,950	131,742	132,534	133,324	134,112	134,886	135,559	136,318	136,973	137,715	138,370	139,011	13,295

Source: Experian MMG

Table LC2
Per capita leisure expenditure projections

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £
Accommodation services							
2012 (actual)	101	143	126	160	172	158	201
2014 (estimate)	100	141	124	158	170	156	199
2017 (estimate)	104	147	129	164	176	161	206
2021 (estimate)	110	155	136	174	187	171	218
2026 (estimate)	117	166	145	185	199	182	233
2031 (estimate)	125	177	155	198	213	195	248
Cultural services							
2012 (actual)	228	295	263	321	330	324	368
2014 (estimate)	225	292	260	317	326	320	364
2017 (estimate)	234	303	269	329	338	332	378
2021 (estimate)	248	321	285	348	358	351	400
2026 (estimate)	264	342	304	371	382	375	427
2031 (estimate)	282	365	324	396	407	400	455
Games of chance							
2012 (actual)	286	331	348	430	346	351	354
2014 (estimate)	282	327	344	425	343	347	350
2017 (estimate)	293	339	356	441	355	359	363
2021 (estimate)	310	359	377	467	376	381	384
2026 (estimate)	331	383	402	498	401	406	410
2031 (estimate)	353	409	429	531	428	433	437
Hairdressing salons and personal grooming							
2012 (actual)	75	122	101	124	125	117	150
2014 (estimate)	74	120	99	122	124	116	149
2017 (estimate)	76	125	103	127	128	120	154
2021 (estimate)	81	132	109	134	136	127	163
2026 (estimate)	86	141	116	143	145	136	174
2031 (estimate)	92	150	124	153	154	145	186
Recreational and sporting services							
2012 (actual)	87	158	129	167	204	178	244
2014 (estimate)	86	156	128	165	202	176	242
2017 (estimate)	89	162	132	171	209	182	250
2021 (estimate)	94	172	140	181	222	193	265
2026 (estimate)	101	183	149	193	236	206	283
2031 (estimate)	107	195	159	206	252	219	302
Restaurants, cafes							
2012 (actual)	824	1038	908	1141	1086	1070	1164
2014 (estimate)	815	1026	898	1128	1074	1058	1152
2017 (estimate)	844	1064	931	1169	1114	1097	1193
2021 (estimate)	895	1127	986	1238	1180	1162	1264
2026 (estimate)	954	1202	1052	1321	1258	1239	1349
2031 (estimate)	1018	1282	1122	1409	1342	1322	1439

Source: Experian MMG for 2012 base data

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 11, October 2013, Figures 1a and 1b):

2012-13	-0.90%
2013-14	-0.20%
2014-15	0.70%
2015-16	1.40%
2016-20	1.50%
2021-31	1.30%

All monetary values are held constant at 2012 prices.

Table LC3
Total leisure expenditure

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Total £m
Accommodation services								
2012 (actual)	5.21	2.48	2.03	0.97	1.90	2.27	1.86	16.72
2014 (estimate)	5.19	2.47	2.02	0.97	1.92	2.26	1.86	16.69
2017 (estimate)	5.44	2.60	2.13	1.02	2.06	2.37	1.96	17.58
2021 (estimate)	5.88	2.82	2.30	1.10	2.27	2.57	2.12	19.06
2026 (estimate)	6.44	3.09	2.53	1.20	2.53	2.81	2.33	20.94
2031 (estimate)	7.03	3.39	2.77	1.31	2.79	3.07	2.55	22.91
Change, 2014-31	**1.84**	**0.91**	**0.75**	**0.34**	**0.87**	**0.81**	**0.69**	**6.22**
Cultural services								
2012 (actual)	11.72	5.13	4.24	1.95	3.64	4.66	3.40	34.75
2014 (estimate)	11.67	5.11	4.23	1.94	3.69	4.64	3.41	34.68
2017 (estimate)	12.24	5.37	4.45	2.03	3.95	4.88	3.59	36.52
2021 (estimate)	13.23	5.82	4.82	2.19	4.36	5.27	3.89	39.59
2026 (estimate)	14.49	6.39	5.29	2.40	4.86	5.78	4.27	43.47
2031 (estimate)	15.82	6.99	5.80	2.62	5.36	6.31	4.67	47.56
Change, 2014-31	**4.15**	**1.88**	**1.57**	**0.68**	**1.67**	**1.67**	**1.26**	**12.88**
Games of chance								
2012 (actual)	14.68	5.75	5.61	2.61	3.83	5.05	3.27	40.80
2014 (estimate)	14.62	5.73	5.60	2.60	3.87	5.03	3.27	40.71
2017 (estimate)	15.33	6.02	5.89	2.73	4.15	5.28	3.45	42.85
2021 (estimate)	16.57	6.52	6.38	2.94	4.58	5.71	3.74	46.45
2026 (estimate)	18.14	7.16	7.01	3.22	5.10	6.26	4.10	50.99
2031 (estimate)	19.81	7.84	7.68	3.52	5.63	6.84	4.48	55.78
Change, 2014-31	**5.19**	**2.11**	**2.08**	**0.92**	**1.75**	**1.81**	**1.21**	**15.07**
Hairdressing salons and personal grooming								
2012 (actual)	3.83	2.11	1.62	0.75	1.38	1.69	1.39	12.77
2014 (estimate)	3.81	2.10	1.62	0.75	1.40	1.68	1.39	12.75
2017 (estimate)	4.00	2.21	1.70	0.78	1.50	1.76	1.47	13.43
2021 (estimate)	4.32	2.40	1.85	0.85	1.65	1.91	1.59	14.56
2026 (estimate)	4.73	2.63	2.03	0.93	1.84	2.09	1.74	15.99
2031 (estimate)	5.17	2.88	2.22	1.01	2.03	2.28	1.90	17.50
Change, 2014-31	**1.35**	**0.78**	**0.60**	**0.26**	**0.63**	**0.60**	**0.51**	**4.75**
Recreational and sporting services								
2012 (actual)	4.47	2.74	2.08	1.01	2.25	2.56	2.26	17.38
2014 (estimate)	4.45	2.73	2.08	1.01	2.28	2.55	2.26	17.36
2017 (estimate)	4.67	2.87	2.19	1.06	2.44	2.67	2.38	18.29
2021 (estimate)	5.05	3.11	2.37	1.14	2.70	2.89	2.58	19.84
2026 (estimate)	5.53	3.42	2.60	1.25	3.00	3.17	2.83	21.80
2031 (estimate)	6.04	3.74	2.85	1.36	3.31	3.46	3.10	23.86
Change, 2014-31	**1.58**	**1.01**	**0.77**	**0.35**	**1.03**	**0.91**	**0.84**	**6.50**
Restaurants, cafes								
2012 (actual)	42.36	18.01	14.67	6.93	12.01	15.42	10.76	120.16
2014 (estimate)	42.17	17.95	14.62	6.90	12.15	15.36	10.77	119.92
2017 (estimate)	44.24	18.88	15.39	7.24	13.01	16.12	11.35	126.24
2021 (estimate)	47.81	20.45	16.68	7.81	14.35	17.44	12.31	136.85
2026 (estimate)	52.35	22.45	18.31	8.55	16.00	19.11	13.49	150.25
2031 (estimate)	57.16	24.57	20.05	9.32	17.65	20.88	14.75	164.38
Change, 2014-31	**14.98**	**6.62**	**5.43**	**2.43**	**5.50**	**5.52**	**3.98**	**44.46**

Source: Table LC1, Table LC2

All monetary values are held constant at 2012 prices.

Table LC4a
Leisure goods market shares — restaurants

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Main locations in study area							
Folkestone	33.90%	4.39%	11.29%	3.40%	3.72%	24.24%	4.26%
Sandgate, Folkestone	1.27%	0.00%	0.00%	0.00%	0.00%	0.59%	0.00%
Cheriton (Folkestone)	4.39%	0.00%	0.00%	0.00%	0.00%	3.75%	0.60%
Hythe	5.47%	40.69%	3.39%	1.74%	3.55%	9.71%	1.53%
New Romney	0.65%	0.00%	24.03%	3.47%	0.93%	0.00%	0.60%
Hawkinge	0.30%	0.55%	0.00%	0.00%	0.00%	6.11%	0.00%
Other locations in study area	1.59%	1.64%	5.44%	6.37%	22.05%	6.17%	8.68%
Total for study area	**47.57%**	**47.27%**	**44.15%**	**14.97%**	**30.25%**	**50.56%**	**15.67%**
Main locations outside study area							
Ashford	8.86%	6.49%	11.57%	11.75%	31.93%	3.33%	5.46%
Canterbury	4.87%	9.46%	0.88%	2.35%	4.87%	10.04%	31.43%
Rye	0.00%	0.55%	0.88%	16.02%	3.39%	0.00%	2.08%
Tenterden	0.00%	3.42%	4.70%	0.68%	2.89%	0.00%	0.60%
Dover	1.63%	0.00%	0.00%	0.00%	0.00%	3.92%	4.69%
Hastings	0.00%	0.00%	1.18%	5.69%	0.00%	0.00%	0.00%
Other locations outside study area	5.66%	1.40%	2.31%	2.66%	5.53%	2.84%	13.92%
Total for outside study area	**21.01%**	**21.32%**	**21.51%**	**39.15%**	**48.61%**	**20.13%**	**58.18%**
Sub-total	**68.59%**	**68.59%**	**65.66%**	**54.12%**	**78.86%**	**70.69%**	**73.85%**
(Don't know / varies)	*6.29%*	*5.04%*	*5.75%*	*8.79%*	*5.03%*	*10.88%*	*5.08%*
(Don't do this activity)	*25.12%*	*26.37%*	*28.59%*	*37.10%*	*16.12%*	*18.44%*	*21.08%*
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey

Table LC4b
Leisure goods market shares — restaurants (adjusted)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Main locations in study area							
Folkestone	49.42%	6.40%	17.20%	6.29%	4.72%	34.30%	5.77%
Sandgate, Folkestone	1.85%	0.00%	0.00%	0.00%	0.00%	0.83%	0.00%
Cheriton (Folkestone)	6.40%	0.00%	0.00%	0.00%	0.00%	5.30%	0.81%
Hythe	7.98%	59.32%	5.16%	3.21%	4.50%	13.73%	2.07%
New Romney	0.95%	0.00%	36.60%	6.40%	1.18%	0.00%	0.81%
Hawkinge	0.44%	0.80%	0.00%	0.00%	0.00%	8.64%	0.00%
Other locations in study area	2.32%	2.40%	8.29%	11.77%	27.96%	8.72%	11.75%
Total for study area	**69.36%**	**68.92%**	**67.24%**	**27.66%**	**38.36%**	**71.53%**	**21.22%**
Main locations outside study area							
Ashford	12.91%	9.47%	17.61%	21.71%	40.49%	4.72%	7.39%
Canterbury	7.10%	13.79%	1.33%	4.35%	6.17%	14.20%	42.56%
Rye	0.00%	0.80%	1.33%	29.60%	4.30%	0.00%	2.81%
Tenterden	0.00%	4.99%	7.16%	1.26%	3.67%	0.00%	0.81%
Dover	2.38%	0.00%	0.00%	0.00%	0.00%	5.54%	6.35%
Hastings	0.00%	0.00%	1.80%	10.51%	0.00%	0.00%	0.00%
Other locations outside study area	8.24%	2.04%	3.52%	4.91%	7.01%	4.02%	18.84%
Total for outside study area	**30.64%**	**31.08%**	**32.76%**	**72.34%**	**61.64%**	**28.47%**	**78.78%**
Sub-total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%** #

Source: NEMS Household Survey
Figures from Table LC4a adjusted to remove respondents who answered 'don't know / don't do this activity' in the relevant household survey question

Table LC5a
Leisure goods market shares — cafes and coffee shops

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Main locations in study area							
Folkestone	49.22%	9.08%	7.85%	3.10%	2.08%	31.32%	2.35%
Hythe	3.15%	44.16%	18.86%	1.06%	7.15%	9.44%	1.80%
Cheriton (Folkestone)	5.66%	0.00%	0.56%	0.00%	0.00%	0.59%	0.00%
Sandgate (Folkestone)	1.36%	0.00%	0.00%	0.00%	0.00%	0.59%	0.00%
New Romney	0.00%	0.00%	12.07%	10.08%	0.00%	0.00%	0.00%
Other locations in study area	0.49%	1.40%	1.75%	0.68%	7.49%	4.93%	0.60%
Total for study area	**59.88%**	**54.65%**	**41.09%**	**14.91%**	**16.72%**	**46.86%**	**4.75%**
Main locations outside study area							
Ashford	1.82%	2.85%	14.13%	18.56%	31.67%	0.92%	5.41%
Canterbury	3.20%	5.07%	1.18%	1.06%	3.39%	12.88%	31.64%
Rye	0.00%	0.00%	2.32%	19.54%	0.60%	0.00%	0.93%
Tenterden	0.00%	0.00%	1.18%	0.00%	9.12%	0.00%	0.00%
Dover	0.16%	1.05%	0.00%	0.00%	0.00%	0.00%	9.61%
Hastings	0.00%	0.00%	1.18%	0.68%	0.00%	0.00%	0.00%
Other locations outside study area	2.12%	1.40%	0.56%	1.30%	3.75%	2.04%	3.55%
Total for outside study area	**7.29%**	**10.36%**	**20.56%**	**41.14%**	**48.53%**	**15.83%**	**51.14%**
Sub-total	**67.18%**	**65.01%**	**61.65%**	**56.05%**	**65.24%**	**62.69%**	**55.88%**
(Don't know / varies)	*4.29%*	*6.78%*	*2.88%*	*6.00%*	*4.26%*	*6.10%*	*0.60%*
(Don't do this activity)	*28.53%*	*28.22%*	*35.48%*	*37.96%*	*30.50%*	*31.21%*	*43.52%*
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey

Table LC5b
Leisure goods market shares — cafes and coffee shops (adjusted)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Main locations in study area							
Folkestone	73.27%	13.97%	12.74%	5.52%	3.19%	49.96%	4.20%
Hythe	4.69%	67.94%	30.59%	1.88%	10.96%	15.05%	3.22%
Cheriton (Folkestone)	8.43%	0.00%	0.91%	0.00%	0.00%	0.94%	0.00%
Sandgate (Folkestone)	2.02%	0.00%	0.00%	0.00%	0.00%	0.94%	0.00%
New Romney	0.00%	0.00%	19.58%	17.98%	0.00%	0.00%	0.00%
Other locations in study area	0.73%	2.15%	2.83%	1.22%	11.48%	7.86%	1.07%
Total for study area	**89.14%**	**84.06%**	**66.65%**	**26.60%**	**25.62%**	**74.75%**	**8.49%**
Main locations outside study area							
Ashford	2.71%	4.38%	22.92%	33.12%	48.54%	1.46%	9.67%
Canterbury	4.76%	7.79%	1.92%	1.88%	5.20%	20.54%	56.62%
Rye	0.00%	0.00%	3.76%	34.86%	0.92%	0.00%	1.67%
Tenterden	0.00%	0.00%	1.92%	0.00%	13.97%	0.00%	0.00%
Dover	0.24%	1.61%	0.00%	0.00%	0.00%	0.00%	17.20%
Hastings	0.00%	0.00%	1.92%	1.22%	0.00%	0.00%	0.00%
Other locations outside study area	3.15%	2.15%	0.91%	2.32%	5.74%	3.25%	6.35%
Total for outside study area	**10.86%**	**15.94%**	**33.35%**	**73.40%**	**74.38%**	**25.25%**	**91.51%**
Sub-total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey
Figures from Table LC5a adjusted to remove respondents who answered 'don't know / don't do this activity' in the relevant household survey question

Table LC6a
Leisure goods market shares — pubs and bars

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Main locations in study area							
Folkestone	30.77%	4.69%	1.64%	0.00%	0.60%	16.01%	0.60%
Hythe	2.30%	38.10%	1.18%	1.06%	0.00%	3.06%	0.00%
Cheriton (Folkestone)	3.99%	1.90%	0.00%	0.00%	0.00%	0.00%	1.15%
Sandgate (Folkestone)	2.39%	0.00%	0.00%	0.00%	0.00%	0.59%	0.00%
New Romney	0.00%	0.00%	24.33%	4.76%	0.93%	0.00%	0.00%
Hawkinge	1.01%	0.00%	0.00%	0.00%	0.00%	9.76%	0.00%
Other locations in study area	0.57%	1.05%	6.32%	5.93%	28.74%	13.19%	20.58%
Total for study area	**41.01%**	**45.73%**	**33.47%**	**11.75%**	**30.28%**	**42.61%**	**22.33%**
Main locations outside study area							
Ashford	0.00%	0.85%	1.95%	5.38%	20.59%	0.92%	1.20%
Canterbury	1.82%	0.00%	0.00%	0.00%	4.68%	5.58%	13.03%
Rye	0.00%	0.00%	0.88%	9.15%	0.60%	0.00%	2.08%
Tenterden	0.00%	0.00%	0.00%	0.00%	1.15%	0.00%	0.00%
Dover	0.85%	0.00%	0.00%	0.00%	0.00%	1.50%	2.68%
Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other locations outside study area	0.41%	5.04%	0.88%	3.34%	1.75%	0.00%	13.43%
Total for outside study area	**3.08%**	**5.89%**	**3.70%**	**17.87%**	**28.77%**	**8.00%**	**32.42%**
Sub-total	**44.09%**	**51.62%**	**37.17%**	**29.62%**	**59.04%**	**50.61%**	**54.75%**
(Don't know / varies)	*3.61%*	*2.99%*	*3.84%*	*5.58%*	*6.50%*	*3.87%*	*5.08%*
(Don't do this activity)	*52.29%*	*45.39%*	*58.99%*	*64.80%*	*34.46%*	*45.52%*	*40.18%*
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey

Table LC6b
Leisure goods market shares — pubs and bars (adjusted)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	
Main locations in study area								
Folkestone	69.77%	9.08%	4.41%	0.00%	1.02%	31.63%	1.10%	#
Hythe	5.21%	73.80%	3.18%	3.56%	0.00%	6.04%	0.00%	#
Cheriton (Folkestone)	9.05%	3.67%	0.00%	0.00%	0.00%	0.00%	2.09%	#
Sandgate (Folkestone)	5.41%	0.00%	0.00%	0.00%	0.00%	1.16%	0.00%	#
New Romney	0.00%	0.00%	65.45%	16.07%	1.58%	0.00%	0.00%	#
Hawkinge	2.29%	0.00%	0.00%	0.00%	0.00%	19.29%	0.00%	#
Other locations in study area	1.28%	2.03%	17.00%	20.03%	48.68%	26.07%	37.59%	
Total for study area	**93.01%**	**88.58%**	**90.03%**	**39.67%**	**51.28%**	**84.20%**	**40.78%**	
Main locations outside study area								
Ashford	0.00%	1.65%	5.25%	18.17%	34.88%	1.81%	2.19%	#
Canterbury	4.13%	0.00%	0.00%	0.00%	7.93%	11.02%	23.80%	#
Rye	0.00%	0.00%	2.36%	30.90%	1.02%	0.00%	3.80%	#
Tenterden	0.00%	0.00%	0.00%	0.00%	1.94%	0.00%	0.00%	#
Dover	1.93%	0.00%	0.00%	0.00%	0.00%	2.97%	4.89%	#
Hastings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	#
Other locations outside study area	0.92%	9.77%	2.36%	11.26%	2.96%	0.00%	24.53%	
Total for outside study area	**6.99%**	**11.42%**	**9.97%**	**60.33%**	**48.72%**	**15.80%**	**59.22%**	
Sub-total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	

Source: NEMS Household Survey
Figures from Table LC6a adjusted to remove respondents who answered 'don't know / don't do this activity' in the relevant household survey question

Table LC7
Summary of A3, A4 & A5 floorspace requirements

			2014	2017	2021	2026	2031
Total population and expenditure							
A	Total population	Persons	126,825	128,767	131,742	135,559	139,011
B	Total study area expenditure on food & drink	£m	119.92	126.24	136.85	150.25	164.38
Retained expenditure							
C	Retained food & drink expenditure[(1)]	%	68%	68%	68%	68%	68%
D	Retained food & drink expenditure	£m	81.78	86.09	93.33	102.46	112.10
E	Expenditure leakage	£m	38.14	40.15	43.53	47.79	52.28
Inflow							
F	Inflow[(2)]	%	10%	10%	10%	10%	10%
G	Inflow	£m	11.99	12.62	13.69	15.03	16.44
Total turnover of food & drink facilities							
H	Total turnover	£m	93.77	93.77	93.77	93.77	93.77
Initial surplus							
I	Growth in retained expenditure	£m	0.00	4.94	13.24	23.72	34.77
Claims on expenditure							
J	Sales efficiency growth in existing operators[(3)]	£m	0.00	0.00	1.51	3.43	5.39
K	Commitments for new floorspace	£m	0	0	0	0	0
L	Total claims on capacity	£m	0.00	0.00	1.51	3.43	5.39
Expenditure summary							
M	Initial surplus of expenditure	£m	0.00	4.94	13.24	23.72	34.77
N	Total claims on capacity	£m	0.00	0.00	1.51	3.43	5.39
O	Residual expenditure	£m	0.00	4.94	11.73	20.28	29.37
Conversion to floorspace requirements							
P	Assumed turnover per sq.m[(4)]	£	6,500	6,500	6,605	6,738	6,874
Q	**Gross food & drink floorspace requirement[(5)]**	**sq.m**	**0**	**760**	**1,776**	**3,011**	**4,274**

All monetary values are held constant at 2012 prices.
Sales efficiency growth rate of 0.4% per annum applied from 2016 onwards.

Table LC8
Leisure goods market shares — cinema & theatre

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %
Locations in study area							
Silver Screen Cinema, Guildhall Street, Folkestone	8.42%	5.38%	1.08%	0.00%	0.00%	2.68%	1.20%
Leas Cliff Hall, Folkestone	2.20%	0.55%	3.59%	0.00%	0.00%	0.59%	0.00%
Metropole Arts Centre, The Leas, Folkestone	0.41%	0.00%	0.00%	0.00%	0.00%	0.92%	0.00%
Other locations in study area	0.00%	0.00%	0.00%	0.00%	0.00%	0.59%	0.00%
Total for study area	**11.02%**	**5.93%**	**4.66%**	**0.00%**	**0.00%**	**4.78%**	**1.20%**
Locations outside study area							
Cineworld, Eureka Entertainment Centre, Ashford	51.82%	58.10%	47.24%	23.15%	55.04%	52.28%	34.60%
Marlowe Theatre, The Friars, Canterbury	3.16%	1.95%	1.44%	0.00%	5.96%	4.51%	7.37%
Odeon, St George's Place, Canterbury	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.39%
Vue, Westwood Cross, Broadstairs	0.00%	1.05%	0.00%	0.00%	0.00%	0.00%	8.62%
Other locations outside study area	1.82%	5.61%	4.37%	10.39%	1.75%	4.19%	5.40%
Total for outside study area	**56.80%**	**66.70%**	**53.04%**	**33.54%**	**62.75%**	**60.98%**	**62.39%**
(Don't know / varies)	1.06%	0.00%	0.56%	1.36%	0.00%	0.00%	1.75%
(Don't do this activity)	31.12%	27.37%	41.73%	65.10%	37.26%	34.24%	34.67%
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Household Survey

Appendix D Diagram of Quantitative Methodology

Appendix: Quantitative Need Methodology

Summary of methodology

Our methodology for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
Step 2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
Step 3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at **Step 1**) with the expenditure figures (calculated at **Step 2**), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
Step 4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at **Step 3**)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
Step 7	Project the spending forecasts forward to the forecast years.
Step 8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
Step 9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix E Technical Inputs into Quantitative Assessment

Appendix: Technical Inputs

Technical inputs into the Shepway Town Centres Study

Data	Source	How we have used the data
Base Population	Experian	Experian's MMG3 software provides 2012-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.
Population Projections	Shepway Council / Experian	Experian's MMG software provides annual population projections over the period to 2031. These have been verified by the Council.
Base Per Capita Expenditure	Experian	Experian's MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.
Retail and leisure expenditure growth forecasts	Experian	We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 11 (Figures 1a and 1b), as follows: Year / Comparison goods / Convenience goods / Commercial leisure 2012-13: 3.10% / -0.60% / -0.9% 2013-14: 3.20% / -0.60% / -0.2% 2014-15: 2.30% / -0.30% / 0.7% 2015-16: 2.80% / 0.10% / 1.4% 2016-20*: 3.00% / 0.80% / 1.5% 2020+*: 2.90% / 0.80% / 1.3% *per annum growth rates
Base Year Special Forms of Trading (SFT)	Experian / Household survey	Special Forms of Trading refers to the amount of money not spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian's Retail Planner Briefing Note 11 (Appendix 3) advises the following SFT discounts at the base year of the study: Comparison goods (2014): 11.6% Convenience goods (2014): 2.7% For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions.
Growth in SFT	Experian	Experian's Retail Planner Briefing Note 11 (Appendix 3) advises the following SFT discounts at the study forecast years: Year / Comparison goods / Convenience goods 2017: 13.8% / 3.5% 2021: 15.7% / 4.6% 2026: 15.9% / 5.1% 2031: 15.9% / 5.6% For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions. Experian do not project SFT to 2031 and therefore the 2026 is held constant for the remainder of the study period.
Retailer productivity changes	Experian/PBBI	Experian's forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis: Comparison goods: 1.5% per annum, 2014-31 Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-31 Commercial Leisure: 0.4% per annum, 2016-31

Appendix F Development Opportunities

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 1: Sandgate Lanes Shopping Centre at the corner of West Terrace Street and The Leas								
Forms part of a mixed use site which includes a small shopping centre and commercial floor space. The site also contains a car park at the back of the shopping centre and a block of flats. The site is accessed via The Leas for parking. 	Edge of centre	0.52	Yes	60	The shopping centre has a relatively well-integrated active edge along West Terrace. The street is a secondary shopping area in Folkestone. There is potential to make the Leas facing side more active though this may interfere with residential neighbours. The presence of a fairly large anchor shop makes it a well-known landmark.	This site is most suitable for mixed use retail led development although care must be taken to respect the site's residential neighbours	We understand the site to be under single ownership, although the willingness of the owners to undertake any redevelopment is not known.	The site is very easily accessible from the main shopping area and indeed forms an integral part of the secondary shopping area. However, the building itself might need to be renovated since it's located within a conservation area. Creating an active edge facing the sea would further enhance the property.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 2: Sainsbury's Supermarket at the Corner of Bouverie Road West and Manor Road, and part of Cheriton Place.								
The site contains a multi-story car park and a small retail unit as well as secondary retail units along Town Walk – a pedestrianized retail precint. The site is accessed from Manor Road which leads directly to car parking and is also accessed on foot from Cheriton Place and Sandgate Road. . 	Edge of centre	0.67	No	225	The site appears to be in a secondary retail area with moderate levels of pedestrian footfall. However, the monolithic Sainsbury's building has little in the way of active frontages and what should in theory be an 'anchor' store is poorly related to the rest of the retail offer. The rest of the Town Walk Precinct is dated, with small, low quality shops and poor levels of pedestrian activity. There is potential to redevelop the shopping area to 'open up' the site and better integrate it with the surrounding retail offer	Any redevelopment would be expected to be retail-led but could potentially incorporate other town centre uses (including a cinema/ commercial leisure if the bus station site cannot come forward – see Site 4) providing suitable frontage to Sandgate Road can be provided. Any redevelopment would likely have to retain an element of car parking, although possibly not to the extent which is currently provided.	It appears that Town Walk and the Sainsbury's store and adjacent car park were all developed at the same time. It is not known whether ownership of the entire development is with Sainsbury's. The Council may wish to investigate land ownership in this area further to establish whether any scope for site assembly exists, as well as find out the aspirations for Sainsbury's for the future of their store.	The area is easily accessed on foot. The site is surrounded by a number of shops in the surrounding streets meaning that there is potential for retail expansion. Furthermore, parts of the site are pedestrianized. This could potentially attract more footfall if carefully redesigned. The rooftop parking is important if a large anchor store is to remain. This however raises questions on the development's sustainability.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 3: Car Park adjacent to Saga Building, Middleburg Square								
Large, multi-story car park attached which partly meets the needs of the adjacent Saga office building. The site sits in the middle of a large traffic gyratory system. Access is from the Northern side of Middleburg Square. Cars exit the car park on the southern end of the square. We understand that the car park is lightly used at times and there may be scope for a more intensive use of the site given its proximity to the existing primary shopping area. 	Edge of cente	0.46	No	220	The site is completely surrounded by traffic on all sides, making it difficult for pedestrians to access the site. Any redevelopment would require improving crossing opportunities between the site and Bouverie Place.	The site is not especially well integrated into the urban fabric. Development of it for retail uses might serve to 'stretch' the town centre further than its existing northern boundary, which may not support other priorities in the centre, e.g. improvement of underperforming existing retail areas. Providing an element of car parking could be retained, the site is likely to be more suitable for commercial office uses.	The adjacent office building is owned and occupied by Saga, but we understand the car park is privately operated. It could potentially therefore be made available in the short-to-medium term.	The site would be unlikely to attract significant footfall unless improvements were made to the road crossing. Assuming that there were no significant costs of demolition, we would not expect any redevelopment to be prohibitively expensive. However, any redevelopment would need to maintain car parking provision for Saga employees as well as any new occupiers, which may reduce the overall scope for development of the site.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 4: Folkestone Bus Station at the corner of Middleburg Square and Bouverie Square								
The site consists of a bus station adjacent to the Bouverie Place Shopping Centre. The bus station is the main location for alighting and catching buses for residents visiting the town centre, and acts as the start/terminus for a number of cross-town routes. Pedestrian access is from Middleburg Square while the buses exit from Bouverie Place on the Southern end of the site. 	Edge of centre	0.37	Yes	87	There are no permanent structures on the site which would make redevelopment easy. The bus station is adjacent to the Bouverie Place Shopping Centre and, with some reconfiguration of the service roads into the centre, would form a fairly 'natural' extension of this. The site is considered well-suited for retail use, capitalising on this close geographical proximity to the primary shopping area. A relatively high-density scheme could likely be accommodated on the site, reflecting that of the adjacent Bouverie Place.	The site is most suitable for retail or commercial leisure use, given its proximity to the primary shopping area in Folkestone town centre. This would assist in meeting the qualitative shortfall in this type of facility in Folkestone, which this study has identified. It would also be suitable for retail uses.	The site is under the ownership of Stagecoach, who have leased the site in a long-term agreement with Shepway District Council. Initial discussions which the Council have undertaken with Stagecoach indicate that they are unwilling to relocate their bus facilities to locations elsewhere within the town centre. Redevelopment of the site would therefore be dependent on successful negotiations with Stagecoach. We are aware the site has been promoted in the past; what is needed now from the Council is a programme to consider the next steps which need to be taken in order to facilitate the redevelopment of the site.	There are no permanent structures on the site which would suggest there are no significant physical constraints to redeveloping the site. It is considered that existing bus stands could be relocated on Shellons Street, although this would need to be subject to feasibility testing.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 5: Lidl Supermarket at the corner of Shellons Street and St Eanswythe Way								
The site contains a large Lidl Supermarket fronting Shellons Street and two car parks (one serving the supermarket, and a separate Council-operated car park to the rear of the supermarket. Both the entrance and exist to the supermarket are on St Eanswythe Way. 	Edge of centre	0.49	Yes	102	The site is potentially suitable for retail however benefits from a poor relationship to much of the rest of the retail and town centre uses offer in Folkestone town centre. The presence of nearby residential properties may limit its scope for significant intensification of uses.	The site has potential for residential use perhaps with some ground floor retail or other town centre use. We understand there has previously been interest in the site from the health sector. There may also be potential to infill part of the car park with retail units, retaining the existing Lidl store. This would need a comprehensive development approach as the site is owned by both SDC and Lidl However as noted there may be constraints to this, especially in respect of the provision of servicing, and the close proximity of surrounding uses		Redeveloping the site would lead to a loss of approximately 100 parking spaces. This might be detrimental to the supermarket as many visitors appear to drive to the supermarket rather than walk. However in its current state, the site is not well utilised and is poorly integrated / is 'off-pitch' in relation to the rest of the retail offer, to the point where the Lidl store virtually operates as a standalone development. While the site is fairly close to primary shopping area, the site feels somewhat cut off - and this lack of integration may reduce the prospects of significant redevelopment coming forward for town centre uses, particularly if the site was to lose some or all of its car parking.

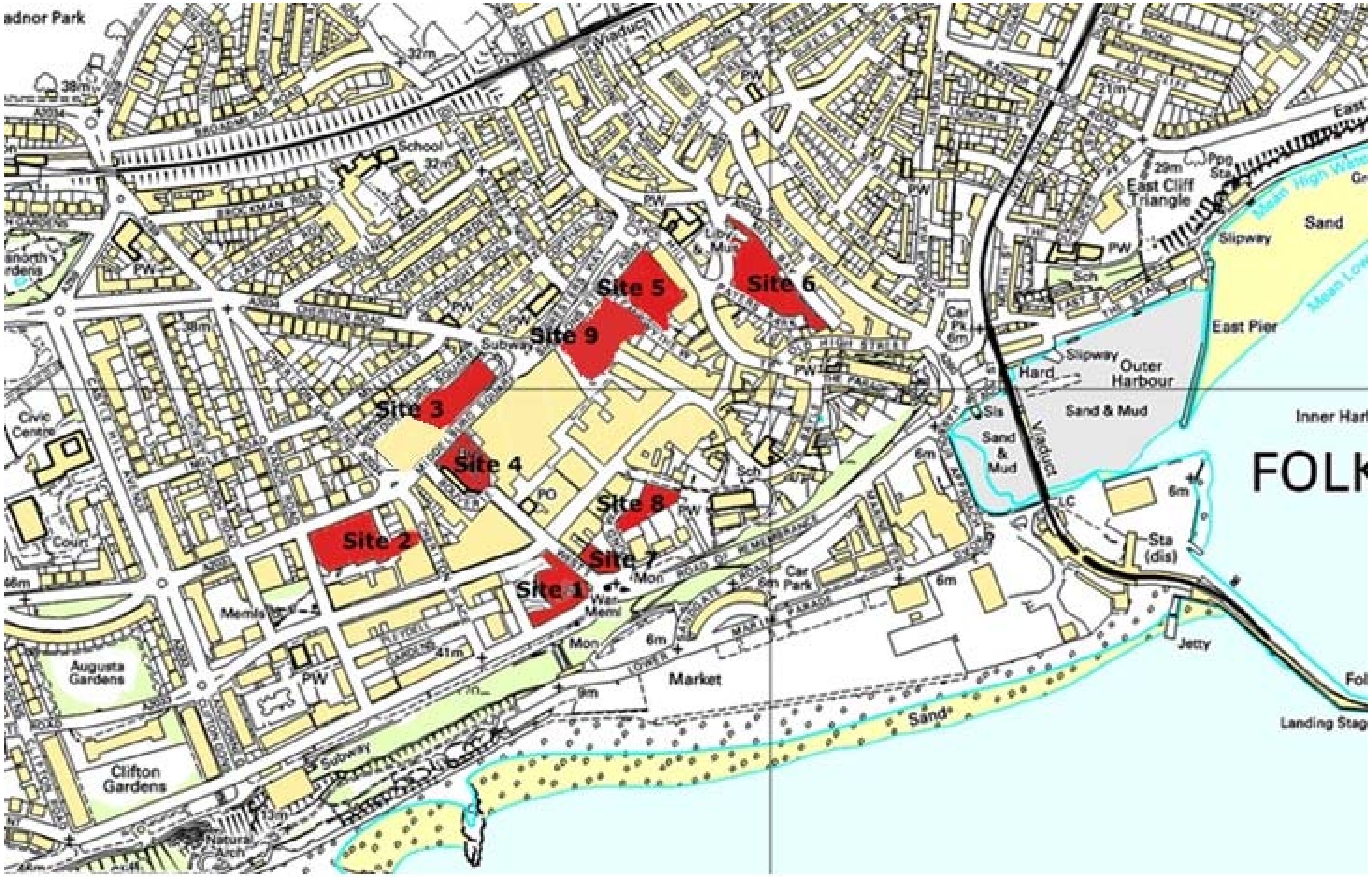
Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 6: Site containing Folkestone Academy								
The site contains the campus of Folkestone Academy, as well as a small wooded area and a couple of terraced houses with ground floor uses. The site sits within Fokestone's Creative Quarter as defined in the Local Plan. There is a through road across the site connecting Payers Park to Mil Bay. There is also parking on both the eastern and western edges of the site. Part of the site has benefited from recent investment to create a new park as well as improved parking facilities.	Edge of centre	0.73	Yes	93	According to Shepway's draft Local Plan intends for the creative quarter to be used for creative, cultural and educational uses. While small-scale retail and commercial activities might be permitted it is unlikely that significant retail development will be allowed. Furthermore, Folkestone Academy is the only higher education institution in Folkestone. Relocating the campus to an alternative location would undermine the Council's ambitions for harnessing creative industries in this	The gradient of the site is a challenge to any future redevelopment which may come forward at the site. Reflecting the location of the site within the Creative Quarter, we would expect any redevelopment to be either creative industries or residential-led.	The recent investment suggests the site is unlikely to come forward in the near term. We understand that a planning application for new access through the site and new studio space / residential units is expected shortly. Should this come forward as planned, it would suggest the site is not available for any further redevelopment.	The Council's draft Local Plan will not permit significant amount of retail development at this site. It would also be difficult to insert retail due to the narrow Mill Bay street running along the Eastern edge of the site. However, there is potential to increase creative uses on the site, taking advantage of the proximity to existing facilities.

					part of the town centre, and also reduce activity in the Creative Quarter and wider town centre.			

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 7:Aspen House - Mixed Use Block on the corner of West Terrace and Pound Way								
The mixed use block features ground floor retail uses with residential use in the upper floors. Car access to the site is along Pound Way. The quality of buildings is poor and the urban form dated. 	Edge of centre	0.11	Yes	45	While the site is close to the primary shopping area and highly accessible, here is limited potential for retail-led redevelopment owing to the presence of residential uses on the upper floors.	Redevelopment options are limited in the short/ medium owing to the residential units in the upper floors.	We are not aware of the ownership of the site, nor if there is any appetite for its redevelopment.	While the site is viable for retail use due to its location and accessibility, it is unlikely to be significant due to the residential use of the building on the upper floors.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 8: Westcliff House - Mixed Use Bloc on the corner of Pound Way and Cliff Gardens								
The mixed use block contains the offices of Folkestone's newspaper as well as NHS facilities on the ground floor, and residential apartments in the upper floors. There is also a sizeable car park on the site. Vehicle access to the site is through Pound Way and onto Cliff gardens. The architectural quality of the site is poor and can be considered something of an eyesore when viewed from Sandgate Road. 	Edge of centre	0.22	Yes	40	The site's main advantage is its close proximity to the primary shopping area. Any redevelopment of the site would be natural extension to the existing primary shopping area. However, it may be dependent on the residential and other uses on the site being relocated elsewhere (or reprovided for as part of any redevelopment).	The site is suitable for retail or commercial leisure use given its proximity to the primary shopping area. Access may however be a constraint. The site could also be suitable for hotel uses if car parking provision was facilitated nearby. Similarly, office development could also be considered, but may also require car parking facilities.	The ownership of the site is not known, but should be assessed by SDC to establish whether the site could easily be brought forward for development if desired.	The size and location of the site makes it suitable for retail or commercial led-redevelopment. However, viability for redevelopment may be compromised by access constraints, or if the site is unable to accommodate a significant quantum of car parking. The size of the site, at 0.22ha, means that it would be more difficult to accommodate a sufficient critical mass of new floorspace relative to some of the other opportunity sites in the town centre.

Site Description	Sequential Location	Site Area (ha)	Conservation Area (Yes/ No/ Part)	Distance from Primary Shopping Area (m)	Suitability for Retail and Town centre Development	Suitability for Other Development	Availability	Viability
Site 9: Shellons Street and Guildhall Street								
The site includes a number of shops and extends on both sides of Guildhall Street. Guildhall Street is generally an attractive shopping street with a large number of historic buildings. 	Edge of centre	0.63	Yes	160	The site has good access by road. The site has a direct connection to the primary shopping area via Guildhall Street. The site already contains a number of small retail units (some of which are occupied) and is adjacent to Bouverie Place Shopping Centre. Upper floors of existing premises contain a mixture of commercial and residential units.	The site is suitable for retail led mixed use development given its location. However, the historic nature of the buildings rules out large scale redevelopment within the short to medium term. We would expect any development to take the form of modernisation/ amalgamation of premises rather than significant demolition/ redevelopment works.	The principal constraint to this area coming forward is the fact that existing premises on Guildhall Street are likely to be under a number of different ownerships – meaning that should the Council wish to bring this site forward for development, it will need to undertake a programme of site assembly to gain a sufficient critical mass for redevelopment.	Should the Council be in a position to acquire site(s) in this area for redevelopment, the priority should be for retail uses, given the identified need for Folkestone to improve the quality of its retail offer to remain a vital and viable centre over the study period. Guildhall Lane currently forms part of Folkestone's secondary retail frontage, as such there is potential to improve linkages with the rest of the town centre and improve the wider retail offer in Folkestone.



(1:5000)

Map Showing Location of Appraised Sites 1-9

Appendix G Stakeholder Engagement Interview Template

Businesses interview template

Business name:

Contact name:

Contact number:

	Question	Response
1.	Where is your business located?	
2.	What sector are you in?	
3.	How many people do you employ? FTE equivalent?	
4.	Does it require a town centre location?	
5.	Thinking about **Folkestone** town centre, which centres are its main competitors?	
6.	How do you think it is faring in comparison to them?	
7.	What about the larger centres such as Canterbury and Maidstone? Should Folkestone try and compete with them? What about Ashford?	
8.	What type of investment might the town centre look to attract to enable it to compete with other & larger centres?	
9.	What about more leisure uses? Culture? Residential?	
10.	What about investment in the public realm? ie Streetscape, furniture etc. Would you be in favour of it?	
11.	For those businesses in Folkestone, would you be willing to contribute, either directly or through a **Business Improvement District**?	
12.	Any other comments on Folkestone?	
13.	Thinking now about **Hythe**. How would you describe its offer compared to Folkestone and the smaller centres in the District?	
14.	What investment or facilities would you like to see in Hythe to improve its offer?	
15.	For those businesses in Hythe, would you be willing to contribute, either directly or through a **Business Improvement District**?	
16.	Any other comments on Hythe?	
17.	Thinking now about **New Romney**. How would you describe its	

	offer compared to Folkestone and Hythe?	
18.	What investment or facilities would you like to see in New Romney to improve its offer?	
19.	Any comments on the smaller centres in the District?	
20.	For those business / developers / investors not in the District, what are you perceptions of the centres of Folkestone & Hythe?	
21.	What range of interventions would be necessary to make these centres attractive for investment?	
22.	Any other comments on these issues that you may wish to make?	