

22 September 2016 at 7.00 pm

Conference Room, Argyle Road, Sevenoaks  
Despatched: 14.09.16



# Planning Advisory Committee

## Membership:

Chairman, Cllr. Mrs. Hunter; Vice-Chairman, Cllr. Thornton  
Cllrs. Dr. Canet, Clark, Gaywood, Halford, Horwood, McGregor, Mrs. Morris,  
Parson, Piper and Scholey

## Agenda

	Pages	Contact
Apologies for Absence		
1. <b>Minutes</b> To agree the Minutes of the meeting of the Committee held on 20 July 2016, as a correct record.	(Pages 1 - 4)	
2. <b>Declarations of Interest</b> Any interest not already registered.		
3. <b>Actions from Previous Meetings (if any)</b>		
4. <b>Update from Portfolio Holder</b>		
5. <b>Referrals from Cabinet or the Audit Committee (if any)</b>		
6. <b>Budget 2017/18: Service Dashboards and Service Change Impact Assessments (SCIAS)</b>	(Pages 5 - 34)	Adrian Rowbotham Tel: 01732 227153
7. <b>Local Plan Update</b>	(Pages 35 - 42)	Hannah Gooden Tel: 01732 227178
8. <b>Economic Needs Study</b>	(Pages 43 - 254)	Helen French Tel: 01732 227357
9. <b>Retail Study</b>	(Pages 255 - 386)	Simon Taylor Tel: 01732 227134
10. <b>Work Plan</b>	(Pages 387 - 388)	

## EXEMPT INFORMATION

At the time of preparing this agenda there were no exempt items. During any such items which may arise the meeting is likely NOT to be open to the public.

If you wish to obtain further factual information on any of the agenda items listed above, please contact the named officer prior to the day of the meeting.

Should you need this agenda or any of the reports in a different format, or have any other queries concerning this agenda or the meeting please contact Democratic Services on 01732 227000 or [democratic.services@sevenoaks.gov.uk](mailto:democratic.services@sevenoaks.gov.uk).

**PLANNING ADVISORY COMMITTEE**

Minutes of the meeting held on 20 July 2016 commencing at 7.00 pm

Present: Cllr. Mrs. Hunter (Chairman)

Cllr. Thornton (Vice Chairman)

Cllrs. Dr. Canet, Halford, Horwood, McGregor, Mrs. Morris, Parson and Piper

Apologies for absence were received from Cllrs. Clark, Gaywood and Scholey

Cllr. Searles was also present.

11. Minutes

Resolved: That the Minutes of the meeting of the Committee held on 21 June 2016 be approved and signed by the Chairman as a correct record.

12. Declarations of Interest

There were no additional declarations of interest.

13. Actions from Previous Meetings

The actions were noted.

14. Update from Portfolio Holder

The Portfolio Holder advised that, along with other Members, he was receiving letters of concern over the call for sites. He reiterated the minutes of the last meeting, 'comments on the suitability of the sites were not being invited at this stage. In order to reduce the period of concern, it was being investigated whether the timetable could be brought forward. These were purely factual summaries..'. The Chairman used her discretion allowing a member of the public to address the Committee. He thought that a lot of public concern would have been spared if certain sites had been omitted from the start. Members further clarified that it was a government driven, district wide process in order to evidence as much information as possible to then be able to eliminate sites with robust and sound evidence and minimise the likelihood of having sites reintroduced by the Planning Inspectorate.

15. Referrals from Cabinet or the Audit Committee

There were none.

16. Swanley and Hextable Masterplan - Vision

Members considered a report which set out a proposed Masterplan for Swanley and Hextable for public consultation. The Masterplan set out a 20 year Vision for regeneration. It provided the means of formulating a cohesive and ambitious Vision for medium to longer term regeneration and growth and provided a focus on the large scale infrastructure projects needed to help achieve a positive transformation.

Members received a [presentation](#) from representatives of Tibbalds, BBP Regeneration and Urban Flow and Members took the opportunity to ask questions.

Members discussed the report and presentation and were in support of the aspirational Vision. Members were keen that the public be widely consulted and suggested the period of consultation should be extended from 6 to 8 weeks. The need for a consultation strategy was discussed, to ensure the best possible communication with residents, stakeholders and neighbouring areas.

Public Sector Equality Duty

Members were reminded of the requirement, under the Public Sector Equality Duty (section 149 of the Equality Act 2010) to have due regard to (i) eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010, (ii) advance equality of opportunity between people from different groups, and (iii) foster good relations between people from different groups. As above, subject to the outcome of public consultation the Masterplan Vision would be refined as an Area Action Plan element of the new Local Plan. The preparation and adoption of a Local Plan would directly impact on end users, and the impacts would be analysed via an Equalities Impact Assessment (EqIA) to be prepared alongside each key stage of plan making.

The Chairman moved and it was

Resolved: That it be recommended to Cabinet that

- a) a Masterplan for the future regeneration and growth of Swanley and Hextable be considered and the Vision agreed and Scenario 3 the transformational growth option, be taken to a full 8 week public consultation;
- b) a full detailed consultation strategy be put in place; and
- c) authority be delegated to the Chief Planning Officer, in consultation with the Planning Portfolio Holder, to make any subsequent changes to the Masterplan as necessary.



17. Sevenoaks District Council Local List

Two representatives of the Sevenoaks Society were welcomed to the meeting and explained the background to their involvement. They advised they would be very pleased to offer their help and advice to any other community groups considering the same. They reported that they had already been asked to speak at Kent CPRE, Margate and Cranbrook.

The Committee thanked everyone involved and showed their appreciation. It was agreed that some publicity should be given to their hard work such as an article in the InShape magazine.

The Conservation Officer presented the report which sought approval to go to public consultation. The report actioned policy EN.4 of the Allocations and Development Management Plan (ADMP) by creating a draft Sevenoaks District Local List Supplementary Planning Document (SPD) for public consultation. The compilation of the proposals to initiate the Sevenoaks District Council's Local List SPD had been a good example of partnership working between the local community and the District Council to action SDC policy. The draft SPD identified criteria for local listing and the buildings, structures and spaces which met that criteria within the Sevenoaks town area.

Members discussed the inclusion of 'gardens' of interest and how they might be included in the criteria. The Conservation Officer advised that this could be added to the descriptive element within criteria 14.

Public Sector Equality Duty

Members noted that consideration had been given to impacts under the Public Sector Equality Duty.

Resolved: That it be recommended to Cabinet that

- a) the draft Local List Supplementary Planning Document, be approved; and
- b) the commencement of the public consultation exercise on the draft Local List Supplementary Planning Document be approved.

18. Work Plan

The work plan was noted and changes agreed

THE MEETING WAS CONCLUDED AT 9.09 PM

CHAIRMAN

**BUDGET 2017/18: SERVICE DASHBOARDS AND SERVICE CHANGE IMPACT ASSESSMENTS (SCIAS)**

**Planning Advisory Committee - 22 September 2016**

Report of Chief Finance Officer

Status: For Decision

Also considered by: Housing and Health Advisory Committee - 4 October 2016

Policy and Performance Advisory Committee - 6 October 2016

Economic and Community Development Advisory Committee - 11 October 2016

Legal and Democratic Services Advisory Committee - 18 October 2016

Direct and Trading Advisory Committee - 1 November 2016

Finance Advisory Committee - 15 November 2016

Key Decision: No

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**Executive Summary:** This report sets out updates to the 2017/18 budget within the existing framework of the 10-year budget and savings plan. The report presents proposals that have been identified which need to be considered, together with further suggestions made by the Advisory Committees, before finalising the budget for 2017/18.

Informed by the latest information from Government and discussions with Cabinet, it is proposed that the Council continues to set a revenue budget which assumes no funding from Government through the Revenue Support Grant or New Homes Bonus. This will result in the Council continuing to be financially self-sufficient as set out in its Corporate Plan.

To achieve this aim and to ensure a balanced budget position over the next 10 year period, whilst also increasing the Council's ability to be sustainable beyond that time, a savings requirement of £100,000 per annum is currently included.

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**Portfolio Holder** Cllr. Searles

**Contact Officer(s)** Adrian Rowbotham Ext. 7153

Helen Martin Ext. 7483

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### Recommendation to each Advisory Committee:

- (a) Advise Cabinet with views on the growth and savings proposals identified in Appendix D applicable to this Advisory Committee.
- (b) Advise Cabinet with further suggestions for growth and savings applicable to this Advisory Committee.

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**Reason for recommendation:** It is important that the views of the Advisory Committees are taken into account in the budget process to ensure that the Council's resources are used in the most suitable manner.

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### Introduction and Background

- 1 The Council's financial strategy over the past twelve years has worked towards increasing financial sustainability and it has been successful through the use of a number of strategies including:
  - implementing efficiency initiatives;
  - significantly reducing the back office function;
  - improved value for money;
  - maximising external income;
  - the movement of resources away from low priority services; and
  - an emphasis on statutory rather than non-statutory services.
- 2 Over this period the Council has focused on delivering high quality services based on Members' priorities and consultation with residents and stakeholders. In financial terms, the adoption of this strategy has to date allowed the Council to move away from its reliance on general fund reserves.
- 3 Using the data sources available to the Council, this report sets out a budget over the 10-year period but recognises that it is likely that more accurate data will become available in future months and current assumptions may need to be updated.
- 4 In setting its budget for 2011/12 onwards, the Council recognised the need to address both the short-term reduction in Government funding as well as the longer-term need to reduce its reliance on reserves. The outcome was a 10-year budget, together with a four-year savings plan, that ensured the Council's finances were placed on a stable footing but that also allowed for flexibility between budget years.
- 5 With the amount of Revenue Support Grant provided by Government continuing to reduce at a significant rate it is important that the council remains financially self-sufficient by having a balanced economy and a financial strategy that is focused on local solutions. These solutions include:

- continuing to deliver financial savings and service efficiencies;
  - growing the council tax and business rate base; and
  - generating more income.
- 6 The intention of this report is to provide Members of each Advisory Committee an opportunity to give their views on potential growth and savings items that could be included in the updated 10-year budget that will be presented to Council on 21 February 2017.
- 7 The 'Financial Prospects and Budget Strategy 2017/18 and Beyond' report has been presented to Cabinet to start the budget setting process for 2017/18.
- 8 This report presents members with the following documents relating to the budget for 2017/18:
- Service Dashboards relating to this Advisory Committee (Appendix A);
  - 2016/17 Budget by Service relating to this Advisory Committee (Appendix B);
  - Summary of the Council's agreed savings plan and growth items (Appendix C);
  - New growth and savings items proposed relating to this Advisory Committee (Appendix D);
  - Service Change Impact Assessment forms (SCIAs) for the new growth and savings items relating to this Advisory Committee - if applicable (Appendix E);
  - 10-year budget (Appendix F);
  - Budget timetable (Appendix G).

### **Financial Self-Sufficiency**

- 9 The Council's Corporate Plan, introduced in 2013, set out an ambition for the Council to become financially self-sufficient which was achieved in 2016/17. This means that the Council no longer requires direct funding from Government, through Revenue Support Grant or New Homes Bonus, to deliver its services.
- 10 This approach was adopted in response to the financial challenges the Country is faced with in bringing its public spending down to ensure it is able to live within its means. In practice this has seen Government funding to local authorities dramatically reduced since 2010/11 with Sevenoaks District Council expecting to receive no Revenue Support Grant from 2017/8.

## Agenda Item 6

- 11 The decision to become financially self-sufficient is intended to give the Council greater control over its services, reducing the potential for decision making to be influenced by the level of funding provided by government to local authorities.
- 12 The Council's decision to seek to become financially self-sufficient was subject to scrutiny by the Local Government Associations Peer Challenge of the District Council during December 2013. In their closing letter to the Council they concluded that they 'fully support that aspiration and given the existing and anticipated squeeze upon public finances this makes much sense'.
- 13 With the Council expecting to receive no Revenue Support Grant from 2017/18 and New Homes Bonus expected to reduce from 2018/19, this approach remains appropriate. The attached 10-year budget assumes no Revenue Support Grant or New Homes Bonus. Any funding received from these sources will be put into the Financial Plan Reserve which can be used to support the 10-year budget by funding invest to save initiatives and supporting the Property Investment Strategy. One of the aims of the Property Investment Strategy is to achieve returns of 6%; therefore using funding for this purpose will result in additional year on year income that is not impacted by Government decisions.
- 14 Cabinet are keen to remain financially self-sufficient and be ahead of the game. This will allow this Council to move ahead in the knowledge that this council has the financial resources to provide the services that the district's residents want into the future.

### Service Dashboards

- 15 The intention of service dashboards is to provide Members with improved information during the budget setting process to provide context and inform any growth and savings ideas that Members may put forward.
- 16 The Service Dashboards cover a summary of the services provided, objectives, achievements and opportunities, challenges and risks and performance.
- 17 Appendix A contains the Service Dashboards for those services directly relevant to this Advisory Committee and Appendix B contains the budget for those services.

### Savings Plan

- 18 Appendix C to this report sets out a summary of the savings and growth items approved by Council since the 10-year budget strategy was first used in 2011/12, which have allowed the Council to deliver a 10 year balanced budget.
- 19 The savings plan requires a total of £6 million to be saved between 2011/12 and 2017/18 which is an average saving of nearly £900,000 per annum. In

the thirteen years from 2005/06, over £10m of savings will then have been made.

- 20 The 10-year budget attached shows a net saving or additional income requirement of £100,000 per annum to deliver a long term sustainable budget.

### **Proposed Growth and Savings Items**

- 21 Growth items are items that are in addition to non-service issues and risks, such as grant settlements, impacts of economic change and other pressures highlighted in the 'Financial Prospects and Budget Strategy 2017/18 and Beyond' report considered by Cabinet on 15 September 2016.
- 22 A number of growth and savings items will be proposed at the seven Advisory Committees with the aim of achieving the £100,000 mentioned above. The £100,000 does not necessarily have to all be achieved in 2017/18 but the impact is required to be £1m (i.e. £100,000 x 10 years) over the 10-year budget period.
- 23 A list of the proposed growth and savings items relating to this Advisory Committee are listed in Appendix D.
- 24 Service Change Impact Assessments (SCIAs) contain further details for all proposed growth and savings items. SCIAs applicable to this Advisory Committee can be found in Appendix E.

### **Financial Summary**

- 25 The assumptions currently included take into account the latest information available but a number of assumptions may change before the final budget meeting in February 2017.
- 26 The 10-year budget attached at Appendix E includes the changes that were included in the 'Financial Prospects and Budget Strategy 2017/18 and Beyond' report and an additional small change regarding savings previously agreed.

### **Role of the Advisory Committees**

- 27 Members' budget training sessions were held on 14 and 20 September 2016.
- 28 Views of the Advisory Committees on the growth and savings items proposed together with any additional suggestions will be considered by Cabinet at its meeting on 1 December 2016.
- 29 To assist the Advisory Committees in making additional suggestions, Members will be asked for their thoughts on the following points and will be requested to write their comments on post-it notes and put on the relevant board:
- Growth ideas for services within the terms of reference of this Advisory Committee.

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- Savings ideas for services within the terms of reference of this Advisory Committee.

30 Officers will summarise the answers before the Committee decides on suggestions to be recommended to Cabinet.

### Process and Timetable

31 This report is the second stage of the budget process as shown in the Budget Timetable (Appendix G).

32 It is possible that Advisory Committees may have to re-address service budgets in January if significant changes have taken place leading to a large and unmanageable deficit.

### Key Implications

#### Financial

All financial implications are covered elsewhere in this report.

#### Legal Implications and Risk Assessment Statement.

There are no legal implications.

For the effective management of our resources and in order to achieve a sustainable budget it is essential that all service cost changes and risks are identified and considered.

Challenges and risks are included in the Service Dashboards and each Service Change Impact Assessment (SCIA) includes the likely impacts including a risk analysis.

Financial risks will be reviewed again when the Cabinet publishes its proposals for the annual budget.

#### Equality Assessment

Members are reminded of the requirement, under the Public Sector Equality Duty (section 149 of the Equality Act 2010) to have due regard to (i) eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010, (ii) advance equality of opportunity between people from different groups, and (iii) foster good relations between people from different groups.

Individual equality impact assessments have been completed for all Service Change Impact Assessments (SCIAs) to ensure the decision making process is fair and transparent.



## Conclusions

The Strategic Financial and Business Planning process has ensured that the Council follows a logical and well considered process and approach in dealing with the many difficult financial challenges which it has faced. The 10-year budget has further improved this process and helped to ensure that the Council is well placed in dealing with more immediate and longer-term financial challenges.

By becoming financially self-sufficient at an early stage, this Council has become much more in control of its own destiny as the Property Investment Strategy should provide a much more stable income stream than the reducing direct government funding streams.

The attached 10-year budget shows that this Council can continue to be financially stable going into the future with a level of assurance that any council would aspire to.

This budget process will once again be a major financial challenge for a Council that already provides value for money services to a high standard. In making any budget proposals, Members will need to consider the impact on service quality and staff well-being, to ensure that these proposals lead to an achievable 10-year budget that supports the Council's aspirations for customer-focused services.

Members' consideration and scrutiny of the relevant services is an essential and key element in the business and financial planning process. If the net total of growth and savings proposals identified by the Advisory Committees and approved by Cabinet does not reach the £100,000 savings target, additional savings will be required that may result in service changes, to ensure a balanced budget position.

## Appendices

Appendix A - Service Dashboards relating to this Advisory Committee.

Appendix B - 2016/17 Budget by Service relating to this Advisory Committee.

Appendix C - Summary of the Council's agreed savings plan and growth items.

Appendix D - New growth and savings items proposed relating to this Advisory Committee.

Appendix E - Service Change Impact Assessment forms (SCIAs) for the new growth and savings items relating to this Advisory Committee (if applicable).

Appendix F - 10-year budget.

Appendix G - Budget timetable.

## Agenda Item 6

### **Background Papers:**

[Report to Council 16 February 2016 - Budget and Council Tax Setting 2016/17](#)

[Report to Cabinet 15 September 2016 - Financial Prospects and Budget Strategy 2017/18 and Beyond](#)

**Adrian Rowbotham  
Chief Finance Officer**

## Advisory Committee responsibilities

Development Management including arboriculture and planning enforcement.  
 Planning Policy including conservation, plan making, neighbourhood planning and transport policy.

### Objectives

- Prepare and update planning policy and guidance for the District through the Local Plan in line with the Local Development Scheme timetable
- To work with Town and Parish Councils that wish to adopt Neighbourhood Plans
- Oversee the implementation of the Community Infrastructure Levy and the spend of section 106 contributions
- To provide pre-application advice and determine planning applications in accordance with national and local planning policies
- Investigate alleged breaches of planning control and take formal enforcement action when necessary

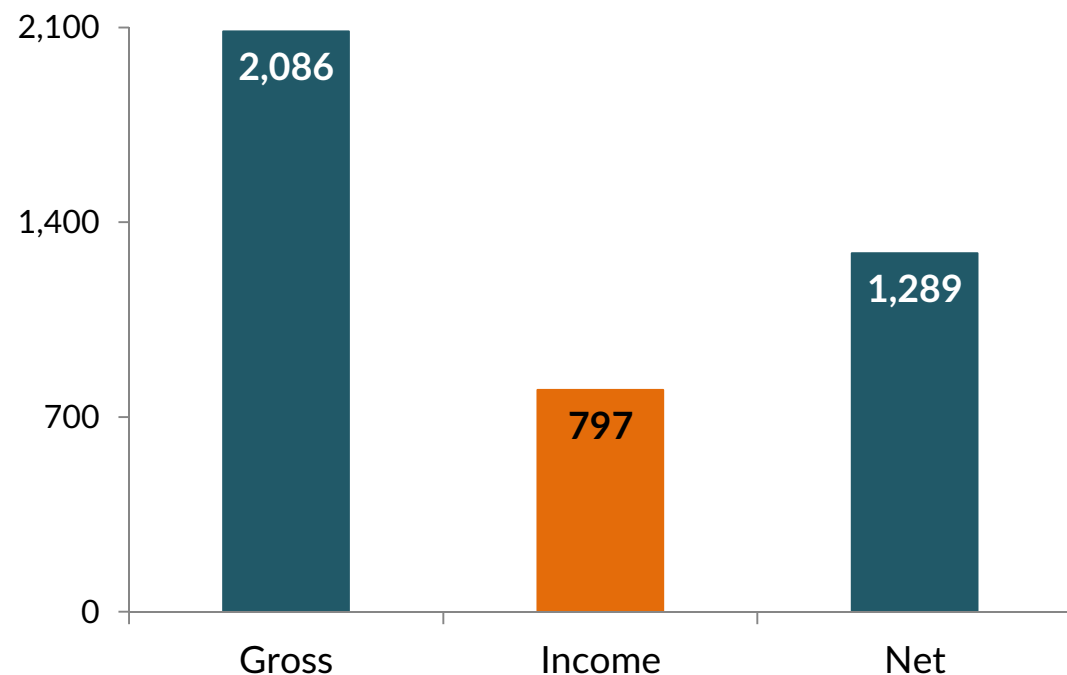
### Achievements & Opportunities

- Consistently high performing development management function when measured for both speed and quality of decision making
- Early implementation of CIL to deliver infrastructure for our communities
- Commitment to produce a new local plan, ensuring the Council retains local control of decision making
- Draft Mastervision for Swanley & Hextable out to consultation
- Excellent progress on gathering the specialist evidence to inform the new Local Plan (retail, economic needs & housing)
- Successful Housing Forum and contribution to the development of the Council's Housing Strategy

### Challenges & Risks

- Ambitious work programme to deliver the Local Plan
- Pace of change in national planning policy
- The Duty to Co-operate (working with neighbouring authorities and key agencies)
- Regeneration and growth (working with SDC economic development team)
- Delivering Affordable Housing (working with SDC housing team)
- The cost of decisions being challenged, either at appeal or through the Courts
- As the busiest planning department in Kent, maintaining our high performance

Planning Budget (£000)



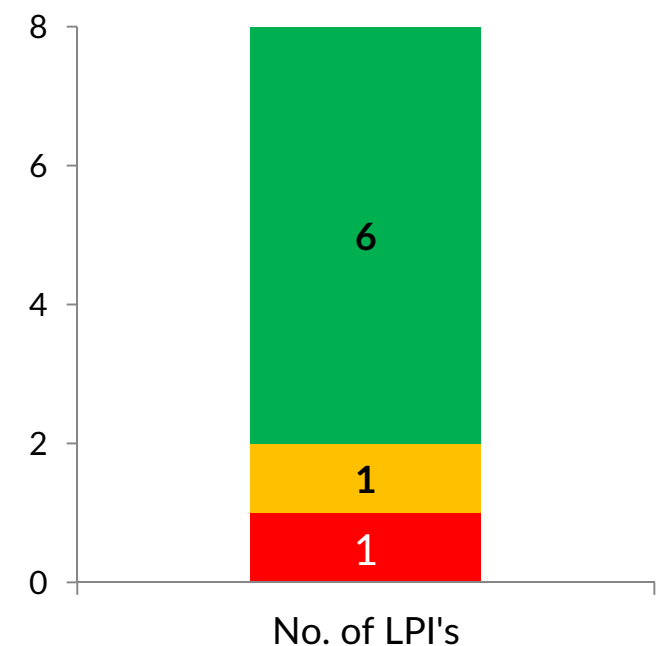
### Service contribution

- Statutory service
- Income generating
- Working in partnership

### Corporate priorities

- Self sufficiency ✗
- Value for Money ✓
- Safe district ✓
- Collect rubbish effectively ✗
- Protect Green Belt ✓
- Local Economy ✓

Performance



## Advisory Committee responsibilities

Building Control including dangerous structures; street naming & numbering; land charges and event management – safety advisory groups

### Objectives

- To successfully deliver and administer Building Regulation applications and provide a rapid 24/7 service response to dangerous structures
- Administer the local Land Charges service and deliver the street naming & numbering service
- Deliver a successful shared working Building Control team with Tonbridge & Malling Borough Council
- Through Safety Advisory groups, ensure safety of the public at local events

### Achievements & Opportunities

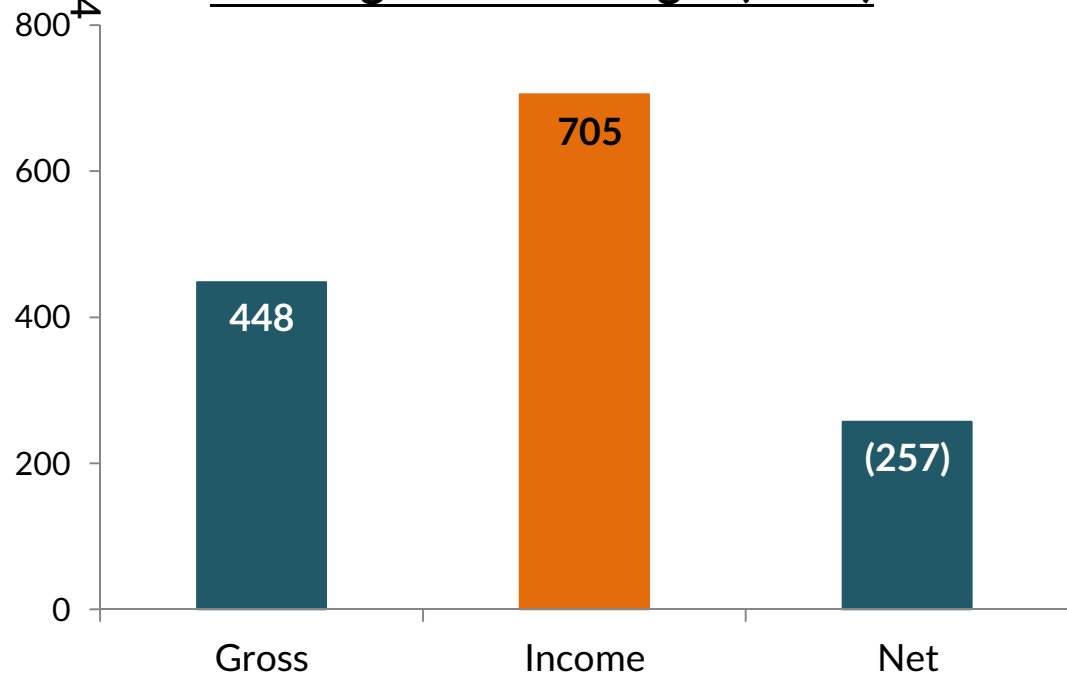
- Shared working arrangement with TMBC for Building Control commenced 1 October 2014, based mainly at SDC offices
- 99% of Building Control plans checked within 15 days and 4,200 site inspections completed annually
- 100% response rate to dangerous structures within 2 hours including out of hours
- Approximately 2,000 land charge searches each year, processed in an average of 10 days
- Opportunity to deliver an online application search facility through a shared public access system
- Opportunity to develop on line forms and fee payment options for Building Control applications

### Challenges & Risks

- Potential for further shared working in Building Control
- Expand discretionary consultancy services for Building Control
- Maintaining market share with increasing competition from the private sector
- Land Registry proposals for local land charges
- Development of 'self service' for personal land charge searches
- Increased demand for Safety Advisory Groups

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**Building Control Budget (£000)**



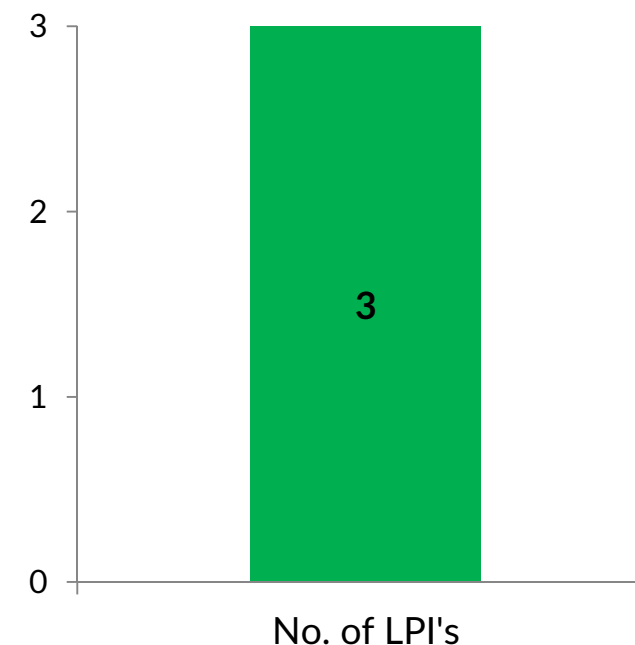
### Service contribution

- Statutory service
- Income generating
- Working in partnership

### Corporate priorities

- Self sufficiency ✓
- Value for Money ✓
- Safe district ✓
- Collect rubbish effectively ✗
- Green Belt ✗
- Local Economy ✓

**Performance**



### Planning Advisory Committee: 2016/17 Budget by Service

<b>Revenue</b>		<b>2016/17</b>	<b>2016/17</b>	<b>2016/17</b>
<b>Chief Officer</b>	<b>Description</b>	<b>Expenditure</b>	<b>Income</b>	<b>Net</b>
		<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Env & Op Svs	Administrative Expenses - Building Control	9	0	9
Env & Op Svs	Building Control	335	(463)	(128)
Env & Op Svs	Building Control Discretionary Work	0	(9)	(9)
Env & Op Svs	Building Control Partnership Hub (SDC Costs)	0	0	0
Env & Op Svs	Dangerous Structures	10	0	10
Env & Op Svs	Land Charges	94	(233)	(139)
Planning Services	Administrative Expenses - Planning Services	35	0	35
Planning Services	Conservation	48	0	48
Planning Services	Planning - Appeals	193	0	193
Planning Services	Planning - CIL Administration	0	(50)	(50)
Planning Services	Planning - Development Management	1,071	(747)	324
Planning Services	Planning - Enforcement	282	0	282
Planning Services	Planning Policy	457	0	457
		<b>2,534</b>	<b>(1,502)</b>	<b>1,032</b>

<b>Capital</b>		<b>2016/17</b>
<b>Chief Officer</b>	<b>Description</b>	<b>Expenditure</b>
		<b>£'000</b>
		0
		0

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Summary of the Council's Agreed Savings and Growth Items

Appendix C

SCIA Year	No.	Description	2011/12 £000	2012/13 £000	2013/14 £000	2014/15 £000	2015/16 £000	2016/17 £000	2017/18 £000	Later Years £000	Total £000
		<b>Direct and Trading Advisory Committee</b>									
2016/17	8	Playgrounds: Reduction in asset maintenance (reversal of temporary saving item)								7	
2016/17	9	Public Conveniences: Reduction in asset maintenance (reversal of temporary saving item)								8	
		<b>Economic and Community Development Advisory Committee</b>									
2014/15	2	Economic Development & Property Team - SCIA originally called 'Broadband and business growth' (reversal of temporary growth item)								(30)	
		<b>Finance Advisory Committee</b>									
2011/12	62,63	Staff terms and conditions - savings agreed by Council 18/10/11							(162)	(674)	
2015/16	10	External Audit fee reduction (reversal of temporary saving item)								30	
		<b>Housing and Health Advisory Committee</b>									
		No savings or growth agreed from 2017/18 onwards									
		<b>Legal and Democratic Services Advisory Committee</b>									
		No savings or growth agreed from 2017/18 onwards									
		<b>Planning Advisory Committee</b>									
		No savings or growth agreed from 2017/18 onwards									
		<b>Policy and Performance Advisory Committee</b>									
2016/17	1	Ec. Dev. & Property: Staffing levels made permanent							28	30	
		<b>Total Savings</b>	(2,984)	(841)	(314)	(479)	(533)	(721)	(162)	(599)	(6,633)
		<b>Total Growth</b>	371	45	50	327	177	309	28	(30)	1,277
		<b>Net Savings</b>	(2,613)	(796)	(264)	(152)	(356)	(412)	(134)	(629)	(5,356)

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## New Growth and Savings Proposals: Planning Advisory Committee

SCIA Year	No.	Description	Year	Ongoing	2017/18 Impact £000	10-year Budget Impact £000
<b>Growth</b>						
2017/18	1	Building Control: Reduction in budgeted income	2017/18	yes	39	390
<b>Sub Total</b>					<b>39</b>	<b>390</b>
<b>Savings</b>						
2017/18	2	Development Management: Distribution of planning applications to Town and Parish Councils	2017/18	yes	(5)	(50)
2017/18	3	Development Management: Service review	2018/19	yes	0	(270)
2017/18	4	Development Management: Revise pre-application charges	2017/18	yes	(20)	(200)
2017/18	5	Development Management: Training	2017/18	yes	(4)	(40)
<b>Sub Total</b>					<b>(29)</b>	<b>(560)</b>
<b>Net Savings Total</b>					<b>10</b>	<b>(170)</b>

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SCIA 1 (17/18)

<b>Chief Officer:</b>	Richard Wilson	<b>Service:</b>	Building Control Partnership
<b>Activity</b>	Building Control - SDC Income	<b>No. of Staff:</b>	8.45 FTE

Activity Budget Change	Year: 2017/18 Growth / (Saving) £000	Later Years Comments (ongoing, one-off, etc.)
Reduction in budgeted income	39	Ongoing

**Reasons for and explanation of proposed change in service**

Budgeted income is currently overstated and based on when compared to actual previous years income received is considered to be an unrealistic target.

In order to achieve the level of income currently budgeted for new business would have to be secured and an additional Surveyor would need to be employed to deal with the extra work.

**Key Stakeholders Affected**

None.

**Likely impacts and implications of the change in service (include Risk Analysis)**

Budgeted income set to realistic level. If not reduced the Building Control Service will fail to achieve its overall budget surplus.

2016/17 - Income budget is £463,305

2016/17 - overall surplus is £127,857

2015/16 - Income achieved - £414,502

2015/16 - overall surplus achieved - £83,932

**Risk to Service Objectives (High / Medium / Low)**

High

2016/17 Budget	£'000	Performance Indicators		
Operational Cost	335	Description	Actual	Target
Income	(463)	Plans checked within 15 days	99%	95%
Net Income	(128)	Register and acknowledge building notices in three days	99%	80%

### Equality Impacts

The decision recommended through this growth item has a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

SCIA 2 (17/18)

<b>Chief Officer:</b>	Richard Morris	<b>Service:</b>	Planning
<b>Activity</b>	Development Management	<b>No. of Staff:</b>	26.37 fte

Activity Budget Change	Year: 2017/18 Growth / (Saving) £000	Later years comments (ongoing, one-off, etc.)
Distribution of planning applications to Town and Parish Councils	(5)	Ongoing

**Reasons for and explanation of proposed change in service**

Currently the Council prints and posts paper copies of planning applications to Town and Parish Councils as part of the consultation process.

All other notifications and consultations are done electronically.

As part of the Council’s paper-less ambition, and to make resource and financial savings, it is proposed to now also notify Town and Parish Councils electronically.

Alternatively the Council could make a charge for the distribution of a paper copy to cover the costs.

**Key Stakeholders Affected**

Town and Parish Councils

**Likely impacts and implications of the change in service (include Risk Analysis)**

Receiving paper copies is likely to be considered both convenient and necessary so the proposed change may not be welcomed by the local Councils.

**Risk to Service Objectives (High / Medium / Low)**

Medium

2016/17 Budget	£'000	Performance Indicators		
Operational Cost	1,071	Code & Description	Actual	Target
Income	(747)	Validation of planning applications	4.18 days	Under 5 days
Net Cost	324	Processing of planning applications:		
		Major (13 weeks)	100%	80%
		Minor (8 weeks)	82%	80%
		Other (8 weeks)	93%	90%

### Equality Impacts

The decisions recommended through this paper have a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

SCIA 3 (17/18)

<b>Chief Officer:</b>	Richard Morris	<b>Service:</b>	Planning
<b>Activity</b>	Development Management	<b>No. of Staff:</b>	26.37 fte

Activity Budget Change	Year: 2018/19 Growth / (Saving) £000	Later Years Comments (ongoing, one-off, etc.)
Service Review	(30)	Ongoing

**Reasons for and explanation of proposed change in service**

Although the duty planner service is well used, many of the answers to the queries can be found on the website, and many others simply require the submission of an application for formal confirmation. Subject to customers being equally well served from other information sources, ceasing the service, which runs all day every day, could result in the saving of a Planning Officer post.

**Key Stakeholders Affected**

Customers of the planning service

**Likely impacts and implications of the change in service (include Risk Analysis)**

Work has already been undertaken to establish the frequently asked questions (and these could be put online and shared with the contact centre). Additionally a significant proportion of queries result in customers being walked through the website, and our improved website should make navigation more straightforward.

**Risk to Service Objectives (High / Medium / Low)**

Medium

2016/17 Budget	£'000	Performance Indicators		
Operational Cost	1,071	Description	Actual	Target
Income	(747)	Validation of planning applications	4.18 days	Under 5 days
Net Cost	324	Processing of planning applications:		
		Major (13 weeks)	100%	80%
		Minor (8 weeks)	82%	80%
		Other (8 weeks)	93%	90%

### Equality Impacts

Members are reminded of the requirement, under the Public Sector Equality Duty (section 149 of the Equality Act 2010) to have due regard to (i) eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010, (ii) advance equality of opportunity between people from different groups, and (iii) foster good relations between people from different groups. The decisions recommended through this paper directly impact on end users. The Council does not hold data about customers or the characteristics of customers that use the duty planner service but it is recognised that there could be some impact on them. Alternative service delivery options will be implemented to reduce or eliminate this impact.



SCIA 4 (17/18)

<b>Chief Officer:</b>	Richard Morris	<b>Service:</b>	Planning
<b>Activity</b>	Development Management	<b>No. of Staff:</b>	26.37 fte

Activity Budget Change	Year: 2017/18 Growth / (Saving) £000	Later Years Comments (ongoing, one-off, etc.)
Revise pre-application charges	(20)	Ongoing

**Reasons for and explanation of proposed change in service**

Charges were introduced for some elements of pre-application advice in 2010. These have not been reviewed since and have a number of exceptions, such as householder advice.

Revising the existing charges and introducing charging for some elements that are currently free would ensure that the service is cost neutral.

**Key Stakeholders Affected**

Users of the pre-application service

**Likely impacts and implications of the change in service (include Risk Analysis)**

Charging for pre-application advice can only recover costs, and due to the current arrangements that doesn't happen at present. The charge is only a fraction of a development's costs and can enable a discretionary service to become cost neutral.

**Risk to Service Objectives (High / Medium / Low)**

Medium

2016/17 Budget	£'000	Performance Indicators		
Operational Cost	1,071	Code & Description	Actual	Target
Income	(747)	Validation of planning applications	4.18 days	Under 5 days
Net Cost	324	Processing of planning applications:		
		Major (13 weeks)	100%	80%
		Minor (8 weeks)	82%	80%
		Other (8 weeks)	93%	90%

### Equality Impacts

The decisions recommended through this paper have a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

SCIA 5 (17/18)

<b>Chief Officer:</b>	Richard Morris	<b>Service:</b>	Planning
<b>Activity</b>	Development Management	<b>No. of Staff:</b>	26.37 fte

Activity Budget Change	2017/18 Growth / (Saving) £000	Later Years Comments (ongoing, one-off, etc.)
Training	(4)	On-going

**Reasons for and explanation of proposed change in service**

The Council has a skilled workforce which delivers excellent internal training on a range of planning related topics. For example, permitted development, material planning considerations, CIL and conservation & heritage.

This training offer could be sold to other Councils, and local councils and interested parties to generate additional income.

**Key Stakeholders Affected**

None

**Likely impacts and implications of the change in service (include Risk Analysis)**

The council is often asked to provide training within our communities and has an ongoing training programme for officers.

Expectations would need to be managed carefully to ensure that work preparing training did not distract from the core functions, and to ensure that paying customers received value for money.

**Risk to Service Objectives (High / Medium / Low)**

Medium

2016/17 Budget	£'000	Performance Indicators		
Operational Cost	1,071	Code & Description	Actual	Target
Income	(747)	Validation of planning applications	4.18 days	Under 5 days
Net Cost	324	Processing of planning applications:		
		Major (13 weeks)	100%	80%
		Minor (8 weeks)	82%	80%
		Other (8 weeks)	93%	90%

### Equality Impacts

The decisions recommended through this paper have a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

Ten Year Budget - Revenue

	Budget 2016/17	Plan 2017/18	Plan 2018/19	Plan 2019/20	Plan 2020/21	Plan 2021/22	Plan 2022/23	Plan 2023/24	Plan 2024/25	Plan 2025/26	Plan 2026/27
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
<b>Expenditure</b>											
Net Service Expenditure c/f	14,253	13,689	14,249	14,489	14,638	15,178	15,536	15,886	16,243	16,605	16,972
Inflation	569	494	611	435	627	443	450	457	462	467	471
Superannuation Fund deficit: actuarial increase	(721)	300	0	0	200	0	0	0	0	0	0
Net savings (approved in previous years)	(13)	(162)	(271)	(216)	(187)	15	0	0	0	0	0
<b>New growth</b>	<b>88</b>	<b>28</b>	<b>0</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>New savings/Income</b>	<b>(487)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>	<b>(100)</b>
<b>Net Service Expenditure b/f</b>	<b>13,689</b>	<b>14,249</b>	<b>14,489</b>	<b>14,638</b>	<b>15,178</b>	<b>15,536</b>	<b>15,886</b>	<b>16,243</b>	<b>16,605</b>	<b>16,972</b>	<b>17,343</b>
<b>Financing Sources</b>											
Government Support											
: Revenue Support Grant	0	0	0	0	0	0	0	0	0	0	0
New Homes Bonus	0	0	0	0	0	0	0	0	0	0	0
Council Tax	(9,672)	(9,982)	(10,300)	(10,627)	(10,963)	(11,309)	(11,663)	(12,028)	(12,402)	(12,786)	(13,181)
Locally Retained Business Rates	(1,951)	(1,989)	(2,048)	(2,113)	(2,155)	(2,198)	(2,242)	(2,287)	(2,333)	(2,380)	(2,428)
Collection Fund Surplus	(333)	0	0	0	0	0	0	0	0	0	0
Interest Receipts	(250)	(130)	(130)	(250)	(250)	(250)	(250)	(250)	(250)	(250)	(250)
Property Investment Strategy Income	(500)	(500)	(1,132)	(1,276)	(1,276)	(1,276)	(1,276)	(1,376)	(1,376)	(1,376)	(1,576)
Contributions to/(from) Reserves	100	(353)	(353)	(353)	(353)	(353)	(179)	(179)	(635)	148	148
<b>Total Financing</b>	<b>(12,606)</b>	<b>(12,954)</b>	<b>(13,963)</b>	<b>(14,619)</b>	<b>(14,997)</b>	<b>(15,386)</b>	<b>(15,610)</b>	<b>(16,120)</b>	<b>(16,996)</b>	<b>(16,644)</b>	<b>(17,287)</b>
<b>Budget Gap (surplus)/deficit</b>	<b>1,083</b>	<b>1,295</b>	<b>526</b>	<b>19</b>	<b>181</b>	<b>150</b>	<b>276</b>	<b>123</b>	<b>(391)</b>	<b>328</b>	<b>56</b>
<b>Contribution to/(from) Stabilisation Reserve</b>	<b>(1,083)</b>	<b>(1,295)</b>	<b>(526)</b>	<b>(19)</b>	<b>(181)</b>	<b>(150)</b>	<b>(276)</b>	<b>(123)</b>	<b>391</b>	<b>(328)</b>	<b>(56)</b>
<b>Unfunded Budget Gap (surplus)/deficit</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>Assumptions</b>	
Revenue Support Grant:	nil all years
Locally Retained Business Rates:	2% all years
Council Tax:	2% all years
Interest Receipts:	£130,000 in 17/18 - 18/19, £250,000 in later years
Property Inv. Strategy:	£500,000 from 16/17, £700,000 from 18/19, £800,000 23/24 onwards. Sennocke and Bradbourne development income included from 2018/19.
Pay award:	1% in 16/17 - 19/20, 2% in later years
Other costs:	2.25% in all years
Income:	2.5% in all years

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2017/18 Budget Setting Timetable

	Date	Committee
<b>Stage 1</b>		
Financial Prospects and Budget Strategy 2017/18 and Beyond	6 September	Finance AC
	15 September	Cabinet
↓		
<b>Stage 2</b>		
Review of Service Dashboards and Service Change Impact Assessments (SCIAs)	22 September	Planning AC
	4 October	Housing & Health AC
	6 October	Policy & Performance AC
	11 October	Economic & Comm. Dev. AC
	18 October	Legal & Dem. Svs AC
	1 November	Direct & Trading AC
	15 November	Finance AC
↓		
<b>Stage 3</b>		
Budget Update (incl. Service Change Impact Assessments (SCIAs), feedback from Advisory Committees)	1 December	Cabinet
↓		
<b>Stage 4</b>		
Budget Update (incl. Government Settlement information)	12 January	Cabinet
↓		
<b>Stage 5</b>		
<i>Budget Update and further review of Service Change Impact Assessments (if required)</i>	<i>January - February</i>	<i>Advisory Committees</i>
↓		
<b>Stage 6</b>		
Budget Setting Meeting (Recommendations to Council)	9 February	Cabinet
↓		
<b>Stage 7</b>		
Budget Setting Meeting (incl. Council Tax setting)	21 February	Council

Note: The Scrutiny Committee may 'call in' items concerning the budget setting process.

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## LOCAL PLAN UPDATE

### Planning Advisory Committee - 22 September 2016

Report of Chief Planning Officer

Status: For Consideration

Key Decision: No

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**This report supports the Key Aim of Protecting the Green Belt**

**Portfolio Holder** Cllr Piper

**Contact Officer** Hannah Gooden, Planning Policy Team Leader, Ext.7178

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#### **Recommendation to Planning Advisory Committee:**

To consider progress with the work programme for preparing a Local Plan

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**Reason for recommendation:** In order to enable discussion and advise on progress with the work programme for the preparation of a Local Plan, including the transition from the evidence gathering phase to the ‘issues and options’ consultation phase.

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#### **Introduction and Background**

- 1 This report provides an update on the Local Plan work programme agreed by the Planning Advisory Committee in July 2015. The work plan focused on the preparation of a proportionate and robust evidence base and effective co-operation with other authorities.
- 2 The report then outlines the transition from this evidence gathering phase towards the ‘issues and options’ consultation phase, which is scheduled to take place late spring/summer 2017. This is also known as the ‘informal consultation’ stage of Local Plan production or ‘Regulation 18’ consultation (of the Town and Country Planning (Local Planning) (England) Regulations).
- 3 The Local Development Scheme (LDS) provides the timetable for the production of the new Local Plan 2015-2035 and was agreed by Cabinet in July. In summary, it outlines:
  - Issues and Options consultation - late Spring / Summer 2017
  - Draft Local Plan consultation - Spring 2018
  - Pre-submission Publication - Summer 2018

## Agenda Item 7

- Submission - Autumn 2018
- Adoption - Summer 2019

### Evidence Gathering

Key areas of recent progress are as follows:

- 4 **Strategic Housing Land Availability Assessment and Employment Land Availability Assessment (SHLAA and ELAA).** Reported to PAC in June. Over 250 sites submitted, visited, mapped and constraints analysis undertaken (6 have since been withdrawn). The call for sites remains open and since the initial call for sites deadline in November 2015, 58 additional sites have been received. In addition, 51 sites have been identified through the 'maximising supply' exercise (including 2008/09 SHLAA sites and sites with planning applications that were refused or withdrawn). Site visits have commenced this month.
- 5 **Swanley and Hextable Masterplan.** Reported to PAC in July and public and stakeholder consultation launched on 7 September for 8 weeks until 2 November. Drop-in sessions currently being held in Swanley and Hextable and newsletter and questionnaire sent to all households in the area. Targeted consultation with key stakeholders and hard-to-reach groups. Results of the consultation to be reported back to PAC in the new year.
- 6 **Green Belt Assessment** - Arup were appointed in August to undertake the study, splitting the whole district into land parcels and assessing them against the five NPPF green belt 'purposes' outlined below, to identify the performance of different areas.
  - To check the unrestricted sprawl of large built-up areas;
  - To prevent neighbouring towns merging into one another;
  - To assist in safeguarding the countryside from encroachment;
  - To preserve the setting and special character of historic towns; and
  - To assist in urban regeneration, by encouraging the recycling of derelict / other urban land.

The study will provide strong evidence for justifying the retention of well performing Green Belt. Where it is demonstrated that the Green Belt continues to perform an important function, these areas are highly unlikely to be subject to any further consideration for release. The Study will also help to identify if there are any areas of more weakly performing Green Belt land that could be considered further for potential development as part of a new Local Plan. A productive duty to co-operate workshop was held with neighbouring authorities to discuss the draft methodology and land parcels. Findings will be reported to PAC in January 2017.

Following on from the assessment of parcels of land against the NPPF purposes, the parcels will then be assessed against statutory natural and historic environmental constraints ('local considerations'). For example, absolute constraints to potential future land use change, regardless of fulfilment of green belt purposes, could include Sites of Special Scientific Interest (SSSIs), Ancient Woodland and Flood Plain (3b). Non-absolute constraints, which would make a change of land-use less preferable, but would not preclude it completely, could include Conservation Areas, Local Wildlife Sites and Agricultural Land Classification (1,2,3a).

- 7 **Landscape Character and Sensitivity Assessment** - Land Use Consultants (LUC) were appointed in August to update the existing landscape character assessment and consider sensitivity of the landscape to change. An inception meeting was held to agree the programme and deliverables and findings will be reported to PAC in January 2017.
- 8 **Economic Needs Study and Retail Study.** Reports provided at this committee meeting.
- 9 **Housing.** Housing Policy are commissioning a Local Housing Needs Study (Interviews 12 September) to drill down and understand housing need at ward level. The programme outlines a final report in February 2017.
- 10 **Open Space, Sport and Leisure Study.** Working in conjunction with the Communities and Business team, the study is progressing well. Assessment work for football and rugby pitches is about to start, during the playing season. Findings to be reported to PAC in spring 2017.
- 11 **Strategic Flood Risk Assessment (SFRA).** Study progressing and work will link to a wider Catchment Study for the Darent and update work on the Medway (including the Eden) being undertaken by the Environment Agency. Findings to be reported to PAC in spring 2017.
- 12 **Duty to Cooperate.** Regular/quarterly officer meetings continue with neighbouring local planning authorities and with other key stakeholders regarding cross-boundary issues. An updated visitor survey was recently undertaken for Ashdown Forest (site designated under the European Habitats Regulations) and officers are working closely with neighbouring authorities to understand any implications of this new evidence.

#### **Transition to Issue and Options consultation**

- 13 The Local Plan will need to make clear **what** is intended to happen in the area over the life of the plan, **where** and **when** this will occur and **how** it will be delivered. This can be done by setting out broad locations and specific allocations of land for different purposes; through designations showing areas where particular opportunities or considerations apply (such as protected habitats); and through criteria-based policies to be taken into account when considering development.

## Agenda Item 7

- 14 The planning policy team are now starting to pull together the emerging findings from the above evidence base documents to consider the content and format of the issues and options consultation, programmed for late spring/summer 2017. This will be the first opportunity for stakeholders and the public to comment on options for the new Local Plan 2015-2035.
- 15 In addition to the evidence-base documents, a series of place-making workshops were held at the beginning of the year, at which invited representatives of all the Town and Parish Councils in the District provided initial input into the Local Plan process. Discussions focussed around what participants liked about their areas, what could be improved and what challenges could be identified. Comments will help to inform the issues and options stage of Local Plan making.
- 16 There are some elements of the existing Core Strategy (2011) and Allocations and Development Management Plan (2015) that will be able to be retained, as these are relatively recent documents. However, as national planning policy changed (in 2012 with the introduction of the NPPF), there are other elements which will need to be updated. A 'critical friend' peer review of our existing plan has been undertaken by the Planning Officer's Society (POS) / Planning Advisory Service (PAS), which outlined the steps to be taken to ensure a NPPF-compliant plan.
- 17 The new Local Plan will set out a vision and a framework for the future development of the District, addressing needs and opportunities in relation to housing, the economy, community facilities and infrastructure - as well as a basis for safeguarding the environment, adapting to climate change and securing good design. The Local Plan is also a critical tool in guiding decisions about individual development proposals, as it is the starting-point for considering whether applications can be approved.

### Potential structure of the consultation

- 18 The issues and options consultation document may take the following structure:
  - A District Profile
  - B Sub-regional / Cross Boundary issues
  - C Vision for the District
  - D Aims / Objectives
  - E Strategic Spatial Options
  - F Policies by Area
  - G Policies by Topic
  - H Delivery Targets and Monitoring

- 19 The **District Profile** will provide context and a summary of the current state of the District, for example, using updated Census information and local data. It will outline the key Issues arising for the District, as identified by local stakeholders and the evidence base, which could relate to:
- Population (aging)
  - Health and Education
  - Community wellbeing and security
  - Housing - numbers, choice and density
  - Employment - numbers and balanced/prosperous economy
  - Town Centres and Shopping
  - Transport and Infrastructure
  - Environment - built and natural
  - Countryside and Green Belt
  - Climate Change
- 20 The profile is also likely to identify key Issues arising by area, for example:
- North - including Swanley and New Ash Green
  - Central - including Sevenoaks and Otford
  - South/West - including Edenbridge and Westerham
- 21 The assessment of **Sub-regional Issues** is likely to include topics such as:
- Ebbsfleet
  - Paramount
  - Bluewater
  - Housing provision and London's growth
  - Employment provision (including links to Bromley)
  - Transport infrastructure
    - Lower Thames crossing
    - Gatwick
    - Rail devolution
  - Health
  - Flood Risk
  - Ashdown Forest
- 22 The **Vision** will respond to the key issues identified in the District and will be aspirational, locally-specific and concise. It will be informed and shaped by local stakeholders.
- 23 The **Aims and Objectives** of the Plan will reflect the three strands of sustainable development (environmental, social and economic aspirations) as set out in the NPPF, with a local focus, to align with other corporate strategies and policies, such as the Economic Development Strategy and the Community Plan prepared by the Local Strategic Partnership. The Local Plan should represent the spatial expression of the Community Plan.

## Agenda Item 7

- 24 The **Strategic Spatial Options** will set out a series of options to meet, or partially meet the needs of the District, including land for housing, employment, community facilities and infrastructure. Potential options might include:
- Development distribution proportional across the whole settlement hierarchy
  - Development distribution focussed on and proportional to the three main centres (Sevenoaks, Swanley and Edenbridge)
  - Development distribution skewed to reflect ambitions for urban renewal
  - Rural ambition - growth in smaller settlements and villages / rural exception sites
- 25 The consultation is likely to consider **Policies by Area**, grouped in line with the settlement hierarchy as set out below:
- Sevenoaks
  - Swanley
  - Edenbridge
  - Otford, New Ash Green, Westerham
  - Lower tier settlements
  - The rural area
- 26 The consultation is also likely to consider **Policies by Topic**, which could cover issues such as
- Housing (Need/Supply/Sectors)
  - Employment (Need/Supply/Sectors) including Retail / Town Centres
  - Environment and Heritage
  - Countryside and Green Belt
  - Leisure, Open Space and Healthy Living
  - Transport and Infrastructure
  - Climate Change and Flood Risk
- 27 The Local Plan will need to be supported by information on **delivery, targets and monitoring**. This will help ensure that the policies are deliverable and that we can monitor how the policy is working (through the annual Authority Monitoring Report AMR).
- 28 A **Sustainability Appraisal** is also in preparation, starting with a scoping report, to support and inform the production of the Local Plan. This will be used to evaluate alternatives and select preferred options. It enables plans and policies to be tested to see how well they perform against economic, social and environmental objectives.
- 29 Progress reports on the development of this issues and options consultation draft will be brought regularly to Planning Advisory Committee in conjunction with updates on the remaining evidence base documents.

## **Other Options Considered and/or Rejected**

Preparation of a Local Plan is required by Government. The Council provided a commitment in 2014 (as part of the ADMP public examination) to review the Local Plan within five years. Not preparing a local plan will leave the Council vulnerable to unwanted planning applications and appeal decisions. Recent Government announcements also indicate that the Government will intervene to prepare plans where they are not being prepared in a timely manner locally.

## **Key Implications**

### Financial

Production of the Local Plan will be funded from the Local Plan reserve.

### Legal Implications and Risk Assessment Statement.

Preparation of a Local Plan is a statutory requirement. There are defined legal requirements that must be met in plan making which are considered when the plan is examined by a Government Planning Inspector. Risks associated with Local Plan making are set out in the Local Development Scheme.

### Equality Assessment.

Members are reminded of the requirement, under the Public Sector Equality Duty (section 149 of the Equality Act 2010) to have due regard to (i) eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010, (ii) advance equality of opportunity between people from different groups, and (iii) foster good relations between people from different groups. The preparation and adoption of a Local Plan will directly impact on end users. The impacts will be analysed via an Equalities Impact Assessment (EqIA) to be prepared alongside each key stage of plan making.

## **Conclusion**

Preparation of a Local Plan is required by Government. The current Core Strategy and Allocations and Development Management Plan are to be updated and combined in a new Local Plan for Sevenoaks District ensuring compliance of policy with any changes in national planning policy since their adoption. This report provides an update on the project plan for the work needed to achieve an adopted Local Plan, including an update on the evidence base and the transition from the evidence gathering phase to the 'issues and options' consultation phase.

**Background Papers:** None

**Richard Morris**  
**Chief Planning Officer**

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## ECONOMIC NEEDS STUDY

### Planning Advisory Committee - 22 September 2016

Report of Chief Planning Officer

Status: For Consideration

Key Decision: No

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#### Executive Summary:

The Economic Needs Study (ENS) was jointly commissioned by Sevenoaks District Council (SDC) and Tunbridge Wells Borough Council to form part of the evidence base of the emerging Local Plan.

The ENS is a technical study which reviews the current status of the District's economy and identifies future employment opportunities. The study recommends an objectively assessment need (OAN) for commercial land up to 2035 of 11.6ha for Sevenoaks District **this is not the Council's commercial land target.**

The ENS also includes analysis of the existing employment sites/land and makes recommendations as to how the Council can support continued economic growth within the District up to 2035 through the Local Plan policies as well as through joint working with the Economic Development Team.

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**Portfolio Holder** Cllr. Robert Piper

**Contact Officer** Helen French, Senior Planning Officer, Ext.7357

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#### Recommendation to Planning Advisory Committee:

To note the Economic Needs Study attached at Appendix A as part of the evidence base for the new Local Plan.

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**Reason for recommendation:** In order to plan for the economic needs of the District and to prepare a Local Plan that is based on sound and robust evidence.

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#### Introduction and Background

- 1 The Allocations and Development Management Plan (ADMP) was adopted in February 2015, and, together with the Core Strategy (adopted 2011), makes up the current Development Plan for the District Council. The Core Strategy was adopted prior to the Government's National Planning Policy Framework (NPPF) being introduced, and as such, now contains some policies that are not consistent with the NPPF.

## Agenda Item 8

- 2 The District Council is therefore required to review its planning policies, and the intention is to combine the two documents into a single Local Plan that contains up to date policies consistent with the NPPF. To ensure that the Local Plan is found sound at examination, the Council is required to prepare a robust evidence base to underpin the land allocations and policies within the new Plan.
- 3 The Economic Needs Study (ENS) is a technical study carried out by expert consultants. It is subject to a prescribed methodology and derived from Government Statistics. The Study will ascertain the current economic market conditions within the District and forecast the demand for commercial land up to 2035.
- 4 The findings of the study will help to inform the development of Local Plan policies for commercial land and SDC corporate economic strategies over the next 20 years.

### Procuring the ENS

- 5 The NPPF encourages joint-working under the duty to co-operate, particularly where there may be cross-boundary issues. The Strategic Housing Market Assessment (SHMA) was jointly commissioned by Sevenoaks District Council and Tunbridge Wells Borough Council as there was strong evidence to suggest that Sevenoaks District and Tunbridge Wells Borough share a housing market area (i.e. there are strong links between the two districts in terms of where people live and work). As a result it was likely that there would also be a shared Functional Economic Market Area (FEMA) and thus the joint commissioning of an Economic Needs Study was an understandable step.
- 6 The consultant Turley in association with Colliers International was appointed to undertake the ENS, based on their quotation and subsequent interview. Their submission was comprehensive, clearly showing expertise and experience in the analysis of economic needs and at Local Plan examination. Colliers, an industry-leading global real estate company, provide additional expertise in preparing the property market review and the commercial site assessments for the study.

### Early Stakeholder Engagement

- 7 The Economic Needs Study was commissioned to go beyond an employment land review. The study brief was specifically widened to include a review of the wider economic needs of the District. As part of fulfilling this aim a stakeholder workshop with commercial agents, adjoining authorities, local landowners/tenants and businesses was held on 18<sup>th</sup> March 2016 at the Stag Theatre in Sevenoaks.
- 8 The workshop was well attended with 27 attendees. This workshop provided the consultants with first hand information on the current economic market conditions as viewed by those working within the District. The workshop highlighted some areas which were then considered further in the final

document including the District's proximity to good transport links, future large scale infrastructure projects and developments outside of the District as well as the potential that demand has been dampened in the past due to the market perception of lack of availability.

### **The Structure of the Study**

- 9 The Study has been prepared jointly for Sevenoaks District Council and Tunbridge Wells Borough Council. As a result, the final report includes baseline information for both Councils as they lie within the same FEMA however, the demand forecasting and site assessments are presented for Sevenoaks District only.

### **The Findings of the ENS**

#### **10 Defining the Functional Economic Market Area (FEMA):**

- The National Planning Practice Guidance (NPPG) gives guidance as to how a Functional Economic Market Area should be determined. By following this national guidance and taking account of current market and industry standards the ENS concludes that both Sevenoaks District and Tunbridge Wells Borough lie within the same FEMA. The two Local Authorities share important economic linkages reflected in commuting flows and other 2011 Census statistical information.
- The study also found that Tonbridge and Malling Borough also forms part of the FEMA given the proximity of Tonbridge to the larger settlements in both Sevenoaks District and Tunbridge Wells Borough.

#### **11 Baseline Context**

- The ENS includes a comprehensive review of the current economic market conditions within Sevenoaks District and Tunbridge Wells Borough.
- The study identified that the two Local Authorities have a diverse business base which has supported employment and productivity growth over the recent years. Sevenoaks District is viewed as an attractive place to work for professional, scientific and technical businesses and has a strong track record of business start-ups and self-employment. It was noted however, that although the District has a highly skilled labour force it also has an ageing demographic trend and this could potentially impact future levels of economic activity.
- Existing employment stock within Sevenoaks District has historically met the needs of the commercial sector with low vacancy rates however, much of the stock is ageing with a limited supply of modern premises. There has been a significant loss in the District's B1a Office stock which has been exasperated by the changes to permitted development rights to allow conversion to residential units.

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- The commercial owners and occupiers within the District also face a number of challenges including significant demand pressure for residential development. Stakeholders also frequently raise the issues of lack of suitable land and premises, poor availability and reliability of digital infrastructure in more rural areas and accessibility and congestion were reported as barriers to economic growth.

### 12 Identifying the objectively assessed commercial land need:

- The ENS uses three complimentary approaches to determine the future need for commercial land across the district up to 2035.
- The *Labour Demand* scenario uses nationally recognised modelling to forecast sectoral and employment projections.
- The *Labour Supply* approach derives projections from the labour supply analysis used in the Strategic Housing Market Assessment 2015 to identify the need for commercial land.
- The *Past Take Up* approach makes projections using the historical commercial land take up and trends.
- The three approaches show a clear alignment in the demand forecasts for commercial land up to 2035. The NPPF states that Local Plans should be positively prepared and therefore the consultants recommend that the Council plan to meet the labour demand scenario commercial land need as this is the greater figure.
- **Therefore the ENS suggests an objectively assessed commercial need (OAN) of at least 11.6ha of employment up to 2035 of which 7.2ha should be suitable for office (B1a/b) use, 1.1ha for industrial (B1c/B2) and 3.3ha suitable for warehouse and storage (B8) use.**

### 13 Assessment of existing commercial sites (Employment Land Review):

- The ENS includes an analysis of the current commercial sites and land. Colliers visited all the employment sites allocated in the ADMP and presented a brief analysis within the ENS. (A more detailed analysis will form part of the Employment Land Availability Assessment).
- Colliers found the majority of the existing employment sites to be performing well and none performing poorly.
- **The ENS recommends the Council consider the expansion of some existing employment sites as well as the allocation of new sites to meet the future need.**

14 Policy Recommendations

- The ENS recommends that the Council seek to meet the OAN for commercial land through the expansion of existing employment sites and new site allocations.
- The ENS also recommends a number of enabling actions including:
  - (1) Undertaking a survey of start-up, small and rural businesses to understand their needs and requirements
  - (2) Continuing to support rural based employment development through positive planning policies and projects
  - (3) The use of Council landholdings to attract inward investment and where possible, encourage both design and build and speculative office (B1a/b), industrial (B1c/B2) and warehouse (B8) development.
  - (4) Working with providers to seek improvements to digital connectivity to support further growth of the rural economy and homeworking.

**Presentation of Findings**

- 15 Two study briefings (19<sup>th</sup> April and 17<sup>th</sup> August) were held with the portfolio holders (including deputies) for Planning and Economic and Community Development. The consultants and officers presented the findings of the study followed by the opportunity to discuss the findings and ask questions.

**What Happens Next**

- 16 A call for sites exercise was undertaken at the end of 2015. Sites were submitted to the Council for commercial use as well as for housing.
- 17 Each site submitted by the November 2015 deadline has been visited and presented to the PAC in June 2016. The sites are to be assessed for suitability and included in the Economic Land Availability Assessment (ELAA). Additional sites can still be submitted to the Council for consideration.
- 18 Each existing employment site allocation of 0.2ha or above has been assessed by Colliers as part of the ENS. These sites will be assessed further by the Planning Policy Team for suitability for commercial allocation and be included in the ELAA.
- 19 The Planning Policy Team will continue to work with the Economic Development Team to consider the policy recommendations set out in the ENS and may undertake additional work to support the Local Plan and wider corporate policies. This may include a business survey to further understand

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the current and future economic requirements of local businesses within the District.

- 20 Completion of the above steps will ensure that the District Council has a robust evidence base to support the development of the Local Plan and the setting of a realistic and deliverable employment land target that will stand up to scrutiny at examination.

### **Other Options Considered and/or Rejected**

The Committee could choose not to endorse the ENS, however this is not recommended. The previous Employment Land Review which informed the Core Strategy and Allocations and Development Management Plan is now considerably out of date. To rely on this out of date evidence would lead to the Local Plan being found unsound at examination.

### **Key Implications**

#### Financial

The ENS is funded through the LDF budget.

#### Legal Implications and Risk Assessment Statement

Preparation of a Local Plan is a statutory requirement. There are defined legal requirements that must be met in plan making which are considered when the plan is examined by a Government Planning Inspector. Risks associated with Local Plan making are set out in the Local Development Scheme.

#### Equality Assessment

Members are reminded of the requirement, under the Public Sector Equality Duty (section 149 of the Equality Act 2010) to have due regard to (i) eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010, (ii) advance equality of opportunity between people from different groups, and (iii) foster good relations between people from different groups. The decisions recommended through this paper directly impact on end users. The impacts will be analysed via an Equalities Impact Assessment (EqIA) to be prepared alongside each key stage of plan making.

### **Conclusions**

The Economic Needs Study (ENS) is an evidence base document to support the Local Plan. The consultant Turley in association with Colliers International was procured jointly by Sevenoaks District and Tunbridge Wells Borough Council to undertake the ENS and identify the objectively assessed need for commercial land across the District. The study includes an analysis of employment opportunities in Sevenoaks District both within existing premises and sites, from yet undeveloped allocations and other areas of land across the District. The study also advises on the best performing/worst performing sectors and which sectors are likely to grow/contract in the future taking account of historic figures as well as local

potential demand. Account has been taken of the potential for demand to have been dampened due to the market perception of lack of availability.

The consultants have produced a comprehensive technical study which will help to inform the development of Local Plan commercial policies and SDC corporate economic strategies over the next 20 years. The Planning Policy Team will continue to work with the Economic Development Team to support the economic growth of the District.

This report outlines the findings of the ENS and the full study is attached at Appendix A.

**Appendices**

Appendix A - Sevenoaks and Tunbridge Wells  
Economic Needs Study - Final Report for  
Sevenoaks District (August 2016)

Appendix B - Land Use Classes

**Background Papers:**

None

**Richard Morris**  
**Chief Planning Officer**

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# **Sevenoaks and Tunbridge Wells Economic Needs Study**

## Final Report for Sevenoaks District

August 2016

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### Our reference

SEVP3001

August 2016

## Executive Summary

1. This Economic Needs Study (ENS) has been prepared by Turley, in association with Colliers International, on behalf of Sevenoaks District and Tunbridge Wells Borough Councils.
2. The study provides an important component of the evidence base for the development of updates to the Councils' respective Local Plans by providing an objective assessment of the need for employment land over the emerging plan period to 2033/35. This reflects the requirements of the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG), and builds upon previous evidence base studies jointly commissioned by the two authorities including the 2015 Strategic Housing Market Assessment (SHMA).

### Study Area

3. The assessment of economic development needs across Functional Economic Market Areas (FEMAs) aligns with the guidance in the PPG, although there is no standard approach to defining such a geography. It is evident that Sevenoaks and Tunbridge Wells share important economic linkages which also extend to cover at least parts of neighbouring Tonbridge and Malling. This reflects evidence of commuting flows, and has become defined as a sub-regional economy through the West Kent Partnership. On this basis, while this study focuses on assessing the needs of the two commissioning authorities of Sevenoaks and Tunbridge Wells, this is contextualised where appropriate with an understanding of the West Kent and wider economic geographies. At the request of the Councils, separate reports have been prepared for both areas, drawing upon jointly prepared baseline information.

### Policy and Strategy Context

4. There is a substantial body of policy and strategic documents which will inform and guide the future economic development of Sevenoaks and Tunbridge Wells. The South East Local Enterprise Partnership (LEP) is currently seeking to drive investment in transport infrastructure to support accelerated growth and rebalance the region towards a growing 'knowledge economy', reducing a historic over-reliance upon the public sector. There are major identified opportunities for growth in the Kent and Medway economy, following a sustained period of investment in infrastructure and a successful partnership between local government and business. The strength and robustness of the West Kent economy is acknowledged by the LEP, given the sizeable knowledge economy and diverse base of small and medium enterprises (SMEs) in innovation and growth sectors. The rural economy also significantly contributes to the sub-regional economy.
5. In Sevenoaks, the current Core Strategy cites the previous Employment Land Review, which showed that in 2007 there is a sufficient supply of sites largely in acceptable locations, although there was an identified need for modernisation. A future additional land requirement for between 0.3ha and 1.5ha was identified, with a view that this could be made up through intensification and use of vacant land.

### Economic and Market Context

6. The study provides a profile of the economy of Sevenoaks and Tunbridge Wells, identifying a diverse business base which has supported employment and productivity growth over recent years. The area is attractive to professional, scientific and technical businesses, and is a strong location for business start-ups and self-employment. The area's labour force is highly skilled and growing, although there is an ageing demographic trend which has implications for levels of economic activity.
7. The existing employment space is concentrated in the main urban areas of Sevenoaks Town and Royal Tunbridge Wells, with further concentrations at Swanley and Paddock Wood and a distribution of smaller premises elsewhere. The stock of employment space is ageing, however, with a relatively limited supply of more modern premises. This is coupled with a tightening of supply generally across all property market sectors, reflected in vacancy rates for office and industrial premises which are very low across both authority areas.
8. Council monitoring data does suggest that new employment floorspace is coming forward for development, although there are also significant losses of office space which have been exacerbated by the permitted development of office to residential conversions. This represents a significant threat to the supply of office space in both authorities. There is also evidence to suggest that there is a limited availability of suitable sites in the District, with demand otherwise met through comparatively small scale changes of use which are constrained by the setting or type of premises converted.
9. Sevenoaks and Tunbridge Wells is an attractive and established location for employment premises, which has historically satisfied the needs of local occupiers with diverse opportunities for future growth across various sectors. There are, however, challenges facing both occupiers and owners, including a significant demand pressure for residential development and competition from other regional centres. The lack of suitable land and premises is an issue frequently raised by stakeholders, alongside the poor availability and reliability of digital infrastructure in rural areas. Transport and accessibility were also consistently reported as key barriers to growth, with congestion remaining an issue.

### Supply Demand Balance

10. Future employment needs and land requirements in both Sevenoaks and Tunbridge Wells have been assessed using three complementary approaches:
  - **Labour Demand** – sectoral and employment forecasts and projections, derived from Oxford Economics' 2014 East of England Forecasting Model (EEFM) with no significant factors requiring an adjustment to the baseline;
  - **Labour Supply** – a demographically derived assessment of employment needs, reflecting the supply of labour under the recommended trend-based demographic projection presented in the 2015 Strategic Housing Market Assessment (SHMA); and
  - **Past Take Up** – based on the past take-up of employment land and property and/or future property market requirements.

11. In order to plan positively for future employment growth, an allowance has also been made for choice, flexibility and losses, resulting in a range of employment land requirements over the period to 2033/35. These are summarised in the following table.

**Table 1: Employment Land Required (2013-2033 and 2013-2035)**

	Labour Demand	Labour Supply	Past Take Up
<b>Land required 2013 – 2033 (ha)</b>			
B1a/b	6.8	6.4	2.5
B1c/B2	1.4	0.9	5.3
B8	3.3	2.2	2.1
<b>Total B</b>	<b>11.5</b>	<b>9.5</b>	<b>9.9</b>
<b>Land required 2013 – 2035 (ha)</b>			
B1a/b	7.2	6.8	2.8
B1c/B2	1.1	0.8	5.0
B8	3.3	2.2	2.3
<b>Total B</b>	<b>11.6</b>	<b>9.8</b>	<b>10.1</b>

Source: Turley

12. It is evident that there is a clear alignment between the amount of employment land in B class uses required across all three scenarios, with the labour supply scenario generating a slightly lower requirement.
13. In accordance with the NPPFs promotion of positive planning, it is recommended that the Council plans on the basis of the labour demand scenario, given that the past take up of office space could be constrained by supply factors, such as a lack of new build office activity in the District. This suggests an objectively assessed need (OAN) for at least 11.6ha of employment land over the period to 2035 of which 7.2ha should be suitable for office (B1a/b) use, 1.1ha suitable for industrial (B1c/B2) uses and 3.3ha suitable for warehouse and storage (B8) use. The Council may, however, wish to consider planning on the basis of a higher requirement for industrial (B1c/B2) land, recognising that the market has been active in recent years with continued take up.
14. The pipeline supply of employment land from existing allocations in the District comprises just 3.0ha of land at Broom Hill, Swanley. This suggests that there remains **a shortfall of around 8.6ha of employment land** to accommodate future B use class development over the period to 2035.
15. Given the constrained land supply position, low levels of vacancy across the current portfolio of floorspace, the majority of this requirement will need to be met through new allocations, with priority given to allocating sites with the potential for delivery in the early years of the plan period. This will respond to the steady demand for both office, industrial and warehouse premises in the District.
16. The current lack of headroom in both the supply of land is a key concern, which can deter investment and limit the scope for the movement and expansion of existing businesses which provide a vital source of local employment.

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17. While there is an overriding need to ensure that the available land supply is used efficiently, there is a risk that the supply of employment land may constrain the growth of local businesses if insufficient land is allocated for employment use, limiting the ability of Sevenoaks to realise its full economic potential.

### **Policy Recommendations**

18. The analysis in this report provides a strong quantitative and qualitative case for retaining existing employment areas and allocating additional land to accommodate the District's future needs. It is recommended that the Council plans positively and increases the choice of sites through new allocations, ensuring that the needs of different sectors can be met over the plan period.
19. Supply in areas close to main arterial roads, public transport nodes or ample car parking are likely to be met with demand, alongside those areas with an existing critical mass of employment uses and amenities which are attractive to investors and occupiers.
20. Colliers therefore consider there to be potential for the expansion of some of the District's existing employment sites. However, where barriers to lateral expansion exist, the Council may wish to consider identifying new standalone allocations which should be suitable for high quality office in response to forecast demand. Consideration should also be given to the provision of sites for a mix of B1, B2 and B8 use in order to accommodate latent demand for industrial and warehouse floorspace, whilst broadening the choice of sites available for prospective occupiers and investors.
21. A number of enabling actions are also recommended, including:
  - Undertaking a survey of start-up, small and rural businesses to understand their needs and location requirements. The study could then be used to inform policy decisions regarding the location of new start-up, incubator and grow on space.
  - Continuing to support rural based employment development by responding positively to proposals that encourage the re-use of redundant agricultural buildings.
  - The use of Council landholdings to attract inward investment, and where possible, encourage both design and build and speculative office (B1a/b), industrial (B1c/B2) and warehouse (B8) development. This should be supported by ongoing business, investor and umbrella organisation (e.g. Locate in Kent, SE LEP, UKTI) engagement to raise awareness of the District's land and property offer.
  - Improvements to digital connectivity to support further growth of the rural economy and homeworking. Whilst this is outside of the Council's direct control, there may be opportunities to engage with providers or seek additional funding sources to support local digital infrastructure projects and investments.
22. It is also imperative for the Council to monitor its employment land position to ensure that the District remains responsive to changes in the pattern of supply and demand over the plan period. The assessment of sites should be kept up-to-date as part of the Council's monitoring and updated annually, with a record of completed floorspace and land take-up

to assist future monitoring and needs assessments. Regularly updating the underlying demand evidence is also considered prudent, and it is recommended that a comprehensive assessment of economic development needs is undertaken at least every 3-5 years. An early review to take account of changes in economic circumstances and forecasts arising from Britain's decision to leave the European Union is, however, recommended.

# 1. Introduction

- 1.1 This Economic Needs Study (ENS) has been prepared by Turley, in association with Colliers International on behalf of Sevenoaks District and Tunbridge Wells Borough Councils.
- 1.2 The study contributes further to the evidence base on the objectively assessed needs (OAN) to help take forward revised Local Plans across both areas. As a key piece of evidence underpinning the Councils' respective Local Plans, the ENS will also help to ensure that future employment policies respond to local economic needs and maximise opportunities for the sustainable economic growth of each area.

### **Study context**

- 1.3 Both Sevenoaks District Council and Tunbridge Wells Borough Council are updating their evidence base and producing a new Local Plan in the immediate future. The revised Local Plans will cover the period from 2015 to 2033/35. To inform this, both authorities are preparing a new evidence base over the period from 2015 to 2017, building on the jointly commissioned Strategic Housing Market Assessment (2015) and other evidence studies. Both expect to publish Issues and Options papers during 2017.
- 1.4 In preparing their evidence base, both Councils are required to produce up to date assessments of employment land need in accordance with guidance set out in the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG). The evidence on which the current employment policy of the two authorities is based pre-dates this guidance. To bring this analysis up to date the economic needs for both areas over the period to 2033 have been assessed, with an extrapolation to 2035 within this report to reflect the Plan period for Sevenoaks District.
- 1.5 The ENS therefore provides an important component of the evidence base for the updated Local Plans for the two authorities, enabling both Councils to fulfil this requirement and ensure their respective Local Plans are robust and sound.
- 1.6 This is not only important for identifying employment land needs but also in understanding the balance between the requirement for homes and jobs and allocating land for both. In view of this it is intended that the results of the ENS will be used to update the economic scenario within the Strategic Housing Market Assessment for the two authorities, published in November 2015.

### **National Planning Policy Framework**

- 1.7 The NPPF was published in March 2012 with the aim of providing a more concise and understandable approach to the planning system and to deliver sustainable development and economic growth.
- 1.8 Looking specifically at the NPPF, firstly it is important to recognise that the NPPF is built around a policy commitment to the achievement of sustainable development. At the heart of the NPPF is a "*presumption in favour of sustainable development*", which requires local authorities in the development of their Local Plans to adopt a positive approach in order to



*“seek opportunities to meet the development needs of an area”* (CLG, 2012, para 14, first bullet).

- 1.9 Further clarification is provided through the core planning principles set out at Paragraph 17 of the Framework. Importantly, this includes the following requirement that planning should:

*“Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities.”* (CLG, 2012, para 17, 3rd bullet).

- 1.10 The Framework provides further guidance on the use of a ‘proportionate evidence base’. At paragraph 158 it states that:

*“Each local planning authority should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals.”* (CLG, 2012, para 158).

- 1.11 Importantly, the NPPF states that policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of it being used for that purpose, including the need for regular reviews of sites, having regard to market signals.

### **Duty to Co-operate: The policy and legislative framework**

- 1.12 The NPPF sets out that local authorities have a ‘duty to Co-operate’ on planning issues that cross administrative boundaries. The Planning and Compulsory Purchase Act (2004) also requires that the local authority engage constructively with its neighbours.
- 1.13 Particular reference within the NPPF is made to the importance of effectively fulfilling this duty when considering, and presenting, the strategic policies to deliver new homes and jobs within Local Plan preparation.
- 1.14 The NPPF provides guidance to local authorities regarding the appropriate measures to undertake in order to fulfil the duty:
- Joint working on areas of common interest is to be diligently undertaken to the mutual benefit of neighbouring local authorities.
  - Collaborative working is to be undertaken between local authorities and other bodies such as Local Enterprise Partnerships (LEPs).
  - Consideration of the preparation of joint planning policies on strategic matters.

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- 1.15 The duty to Co-operate therefore acts as the mechanism by which local planning authorities can effectively:

*“...ensure that strategic priorities across local boundaries are properly coordinated and clearly reflected in individual Local Plans” (DCLG, 2012, para 179).*

- 1.16 The NPPF states that the required outcome of the duty to Co-operate is that, through this constructive process, it should enable:

*“...local planning authorities to work together to meet development requirements which cannot wholly be met within their own areas...” (DCLG, 2012, para 179)*

### **Planning Practice Guidance**

- 1.17 The policy direction of the NPPF is expressed more explicitly through Planning Practice Guidance (PPG), which was published in full in March 2014. Specific guidance is provided on the measures local planning authorities should take to support economic growth and plan proactively to meet the future development needs of businesses.

- 1.18 PPG has been published relating to the assessment of economic development needs and provides a framework for objectively assessing and evidencing development needs to support economic growth and development. The primary objectives of the assessment are:

- to identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and
- to provide a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.

- 1.19 In assessing need, the guidance states that needs should be assessed in relation to the relevant functional area, which for economic development purposes is the functional economic market area, or FEMA, in relation to economic uses. However, the guidance states that it may be appropriate to identify smaller sub-markets with specific features, and it may be appropriate to investigate these specifically in order to create a detailed picture of local need.

## Structure of the Report

- 1.20 In accordance with the above requirements the ENS has been completed in a number of stages, with the study findings presented to reflect this.
- 1.21 At the request of the Councils, separate reports have been prepared for both areas, drawing on jointly prepared baseline information. This report presents the study findings for Sevenoaks District (referred to hereafter as “Sevenoaks”<sup>1</sup>) and is structured as follows:
- Section 2 - The Study Area and FEMA
  - Section 3 - Policy and Strategy Context
  - Section 4 - Economic Baseline
  - Section 5 - Understanding Market Performance
  - Section 6 - The Existing Stock of Employment Floorspace
  - Section 7 - Understanding Business and Stakeholder Views
  - Section 8 - Demand Assessment
  - Section 9 - Site Assessment
  - Section 10 - Supply Demand Balance and Policy Recommendations
- 1.22 The economic needs for Tunbridge Wells Borough are assessed and presented in a separate report.

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<sup>1</sup> The town of Sevenoaks is referred to as “Sevenoaks town”.

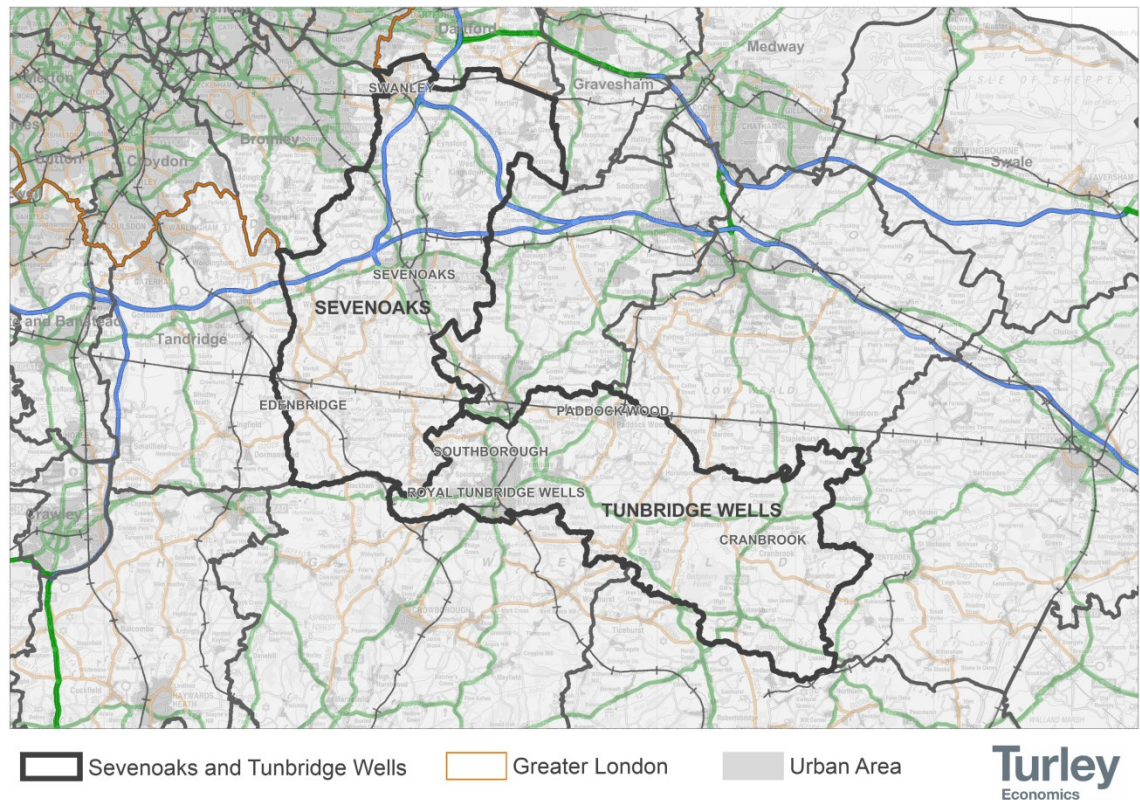
## 2. The Study Area and FEMA

- 2.1 The PPG recognises that economic development needs are rarely defined precisely by local authority administrative boundaries. With this in mind, the guidance identifies that economic needs should be assessed in relation to the relevant Functional Economic Market Area (FEMA).
- 2.2 The guidance notes that there is no standard approach to defining the FEMA, but does suggest that a range of factors should be considered. This includes considering the extent of the Local Enterprise Partnership (LEP), Travel to Work Areas (TTWAs), housing market areas, administrative areas and catchment areas. It is also suggested that the transport network and the flow of goods within the local economy can provide an indication of the functional economic area.
- 2.3 This section provides an overview of these factors in order to determine the FEMA for authority areas of Sevenoaks and Tunbridge Wells.

### **Spatial Context**

- 2.4 The administrative areas of Sevenoaks and Tunbridge Wells are located in west Kent, with the former adjoining London to the north. The M25 circles London and runs through Sevenoaks, and both authorities have regular mainline train services to the capital. The Hastings mainline train service also links the principal towns of Sevenoaks and Royal Tunbridge Wells. Swanley and Edenbridge in Sevenoaks, and Southborough, Paddock Wood and Cranbrook in Tunbridge Wells Borough are the other main towns in the study area, with both authority areas also containing a number of smaller rural villages and settlements.
- 2.5 Tonbridge is also located close to the local authority boundaries, between Sevenoaks Town and Royal Tunbridge Wells. The three towns are central to the economic relationship between the West Kent authorities.

**Figure 2.1: Location Map**



Source: Turley, 2016

## Existing Geographies

- 2.6 Sevenoaks District and Tunbridge Wells Borough are part of various existing partnerships which were established to promote economic development and investment. These are summarised below.

### ***Local Enterprise Partnership***

- 2.7 The PPG states that the defined extent of any Local Enterprise Partnership (LEP) can be a factor in identifying the FEMA. Both Sevenoaks and Tunbridge Wells fall within the South East LEP, which covers East Sussex, Essex, Kent, Medway, Southend and Thurrock and contains over 340,000 businesses<sup>2</sup>.

<sup>2</sup> <http://southeastlep.com/about-us/key-facts>





three authorities have collectively been traditionally regarded as the ‘powerhouse’ economy in the county<sup>7</sup>, and the Partnership therefore promotes the sub-regional economy while engaging with local businesses and pursuing external funding and investment. The role of the Partnership and its relationship with other economic development bodies is considered further in section 3 of this report.

### Travel to Work Area

2.11 The PPG states that Travel to Work Areas (TTWAs) can provide information about commuting flows and the spatial structure of the labour market. This is an official ONS dataset, released to identify areas where the bulk of the resident population also work within the same area.

2.12 2011 TTWAs were defined in August 2015, based on data from the 2011 Census. The methodology document outlines the approach taken:

*“The current criteria for defining TTWAs is that at least 75% of the area’s resident workforce work in the area and at least 75% of the people who work in the area also live in the area. The area must also have an economically active population of at least 3,500. However, for areas with a working population in excess of 25,000, self-containment rates as low as 66.7% are accepted as part of a limited ‘trade-off’ between workforce size and level of self-containment”<sup>8</sup>*

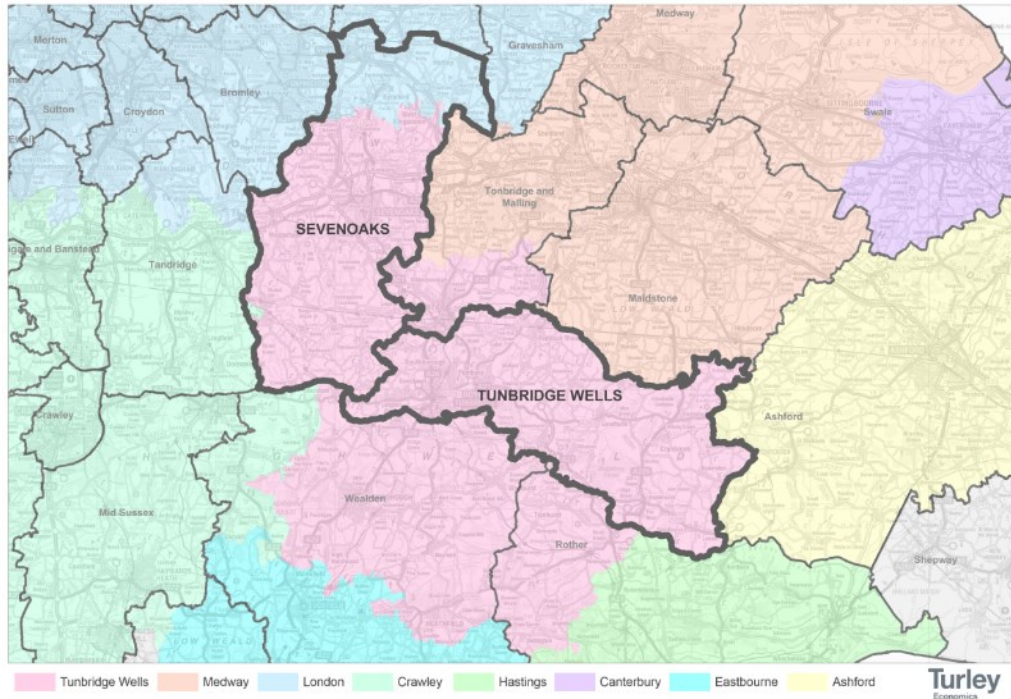
2.13 As shown in Figure 2.3, Sevenoaks and Tunbridge Wells are largely covered by a single TTWA, centred around Royal Tunbridge Wells. This extends beyond the local authority boundaries, however, covering the towns of Tonbridge, Crowborough and other villages in the adjacent authorities, including the north west of Rother and Wealden Districts.

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<sup>7</sup> West Kent Partnership (2014) West Kent Priorities for Growth

<sup>8</sup> ONS (2015) Overview of 2011 Travel to Work Areas

**Figure 2.3: Travel to Work Areas 2011**



Source: ONS, 2015

- 2.14 It is important to note, however, that the northernmost part of Sevenoaks falls within the London TTWA, indicating that Swanley and the surrounding area shares an important functional relationship with London. In contrast, however, there is a limited relationship to the west – which is covered by the Crawley TTWA – with the north east and east of the study area covered by the Medway and Ashford TTWAs respectively.
- 2.15 Collectively, this indicates that there is a relatively distinct economic geography covering the study area, which covers the entirety of Tunbridge Wells Borough and the majority of Sevenoaks District. The relationship with London and the extent of Royal Tunbridge Wells economic influence should also be recognised.



## Commuting Patterns

- 2.16 The TTWAs shown above are based on the findings of the 2011 Census, which can be further analysed to understand the relative self-containment of Sevenoaks and Tunbridge Wells. This focuses both on those commuting to and from the two authorities, which are considered separately below.

### *Commuting to Sevenoaks and Tunbridge Wells*

- 2.17 The composition of the study area's workforce is important to consider, with this showing the extent to which the local economy draws upon a localised or wider labour force. Table 2.1 shows the main places of residence for people working in Sevenoaks and Tunbridge Wells, based on the 2011 Census.

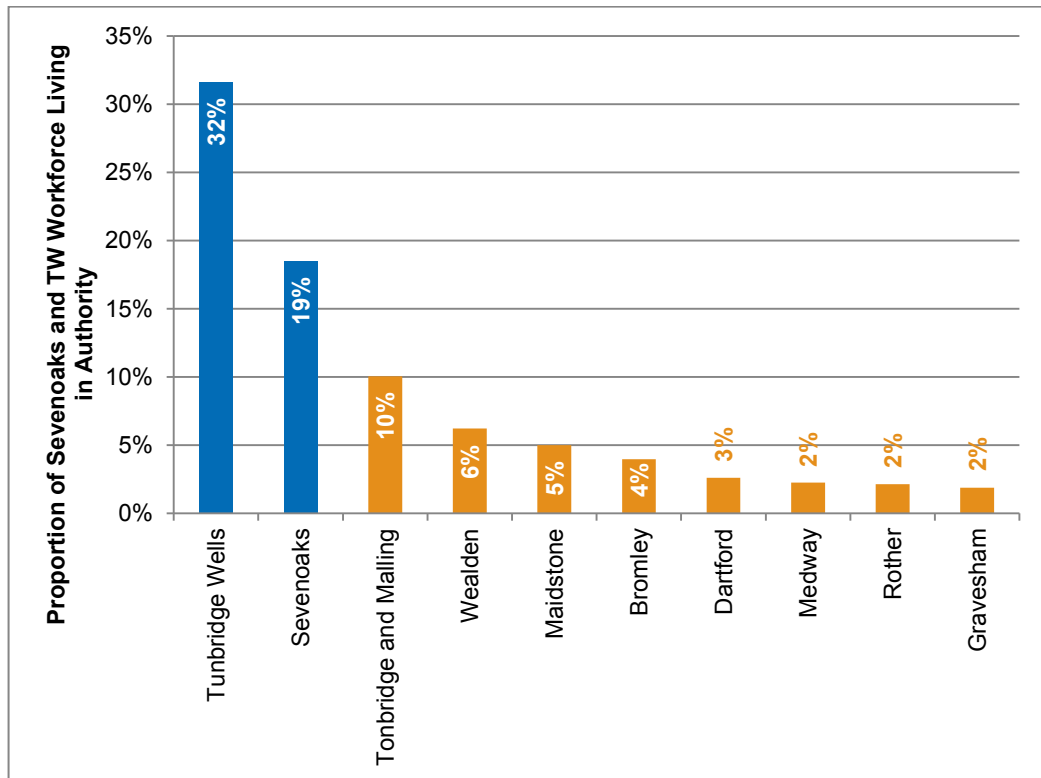
**Table 2.1: Local Authority of Residence for Workers in Sevenoaks and Tunbridge Wells 2011**

Works in Sevenoaks			Works in Tunbridge Wells		
Lives in	Total	%	Lives in	Total	%
Sevenoaks	12,767	38%	Tunbridge Wells	22,088	52%
Tonbridge and Malling	3,378	10%	Tonbridge and Malling	4,261	10%
Bromley	2,679	8%	Wealden	4,119	10%
Tunbridge Wells	1,924	6%	Maidstone	2,671	6%
Dartford	1,853	5%	Rother	1,520	4%
Bexley	1,151	3%	Sevenoaks	1,278	3%
Gravesham	1,148	3%	Ashford	1,138	3%
Maidstone	1,124	3%	Medway	671	2%
Medway	1,039	3%	Hastings	657	2%
Tandridge	851	3%	Bromley	337	1%

*Source: Census 2011*

- 2.18 The Census shows that over half of people working in Tunbridge Wells are also residents of the Borough. Sevenoaks has a lower level of containment, indicating that the District has a more dispersed economic footprint with a greater proportion of the workforce drawn from a wider area. Both authorities draw around 10% of their workforce from neighbouring Tonbridge and Malling.
- 2.19 When considering Sevenoaks and Tunbridge Wells collectively as shown in Figure 2.4, this indicates that half of people living in the two authorities also work within the two authorities. Tonbridge and Malling, Wealden, Maidstone and Bromley collectively accommodate a quarter of the workforce in Sevenoaks and Tunbridge Wells.

**Figure 2.4: Place of Residence for Workers in Sevenoaks and Tunbridge Wells 2011**

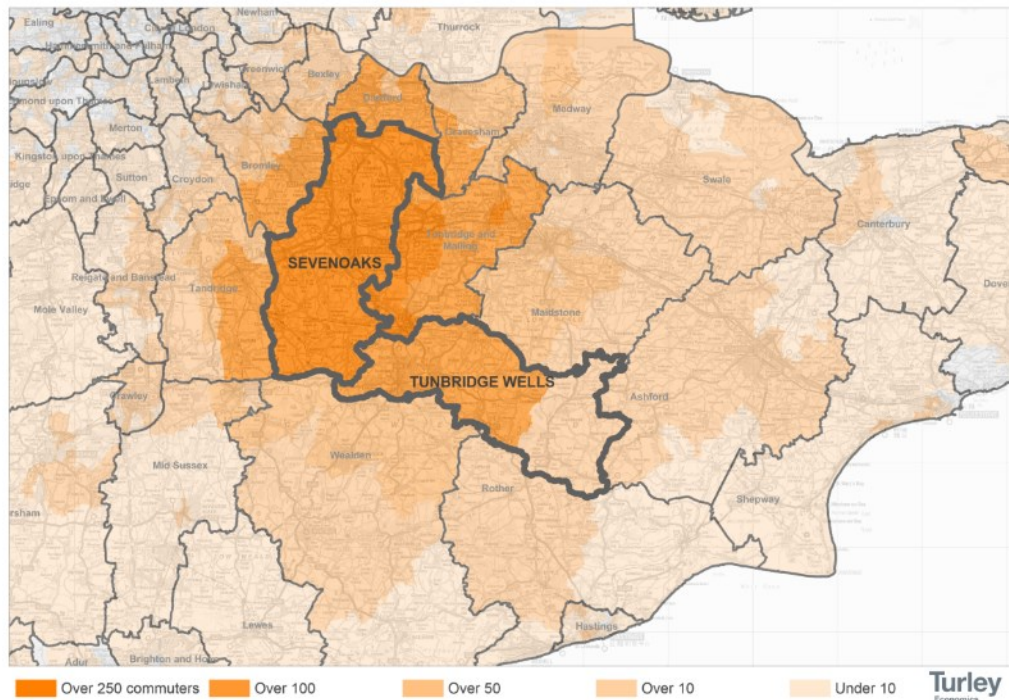


Source: Census 2011

2.20 This can be further understood at a local level, again based on Census data. Figure 2.5 shows where<sup>9</sup> people who work in Sevenoaks live, again indicating that while a sizeable number of workers live within the District, many workers live in adjacent areas of neighbouring authorities and commute into Sevenoaks to work. It is notable that comparatively few people commute from Wealden to Sevenoaks.

<sup>9</sup> Middle layer super output area (MSOA) of residence

**Figure 2.5: Place of Residence for Workers in Sevenoaks 2011**

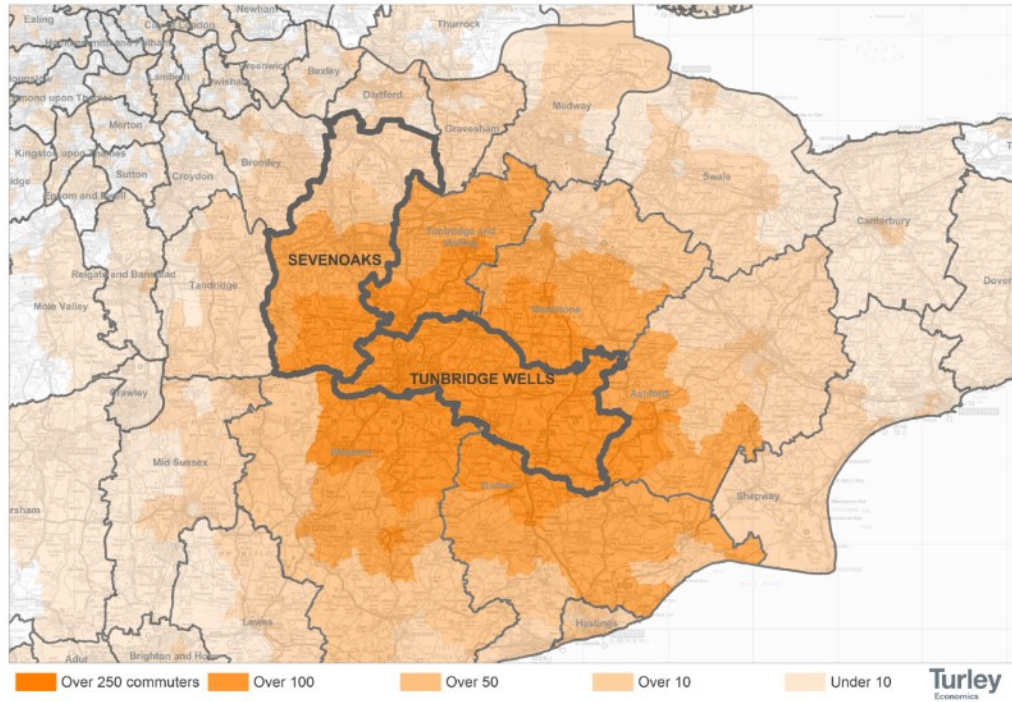


Source: Census 2011; Turley, 2016

- 2.21 Tunbridge Wells shows a slightly different workforce catchment, drawing labour from all neighbouring authorities including unlike Sevenoaks, those to the south and east including Maidstone. This supports the earlier analysis which shows that Tunbridge Wells draws upon a more localised workforce, and indeed the Census shows that people working in Tunbridge Wells travel a shorter distance to work on average<sup>10</sup>.

<sup>10</sup> Average worker commuting to Sevenoaks travels 16.7km; average worker commuting to Tunbridge Wells travels 13.4km (2011 Census)

**Figure 2.6: Place of Residence for Workers in Tunbridge Wells 2011**



Source: Census 2011; Turley, 2016

***Commuting from Sevenoaks and Tunbridge Wells***

2.22 Focusing on residents rather than workers provides an indication of commuting trends amongst the resident labour force in Sevenoaks and Tunbridge Wells. Table 2.2 shows the authorities where the greatest numbers of residents work<sup>11</sup>.

<sup>11</sup> Table is not exhaustive

**Table 2.2: Place of Work for Residents of Sevenoaks and Tunbridge Wells 2011**

Lives in Sevenoaks			Lives in Tunbridge Wells		
Works in	Total	%	Works in	Total	%
Sevenoaks	12,767	30%	Tunbridge Wells	22,088	50%
Westminster <sup>12</sup>	5,528	13%	Tonbridge and Malling	4,062	9%
Bromley	3,095	7%	Westminster <sup>13</sup>	3,930	9%
Dartford	3,010	7%	Sevenoaks	1,924	4%
Tonbridge and Malling	2,119	5%	Maidstone	1,838	4%
Bexley	1,973	5%	Wealden	1,586	4%
Tower Hamlets	1,311	3%	Tower Hamlets	797	2%
Tunbridge Wells	1,278	3%	Southwark	630	1%
Southwark	1,040	2%	Camden	595	1%
Camden	835	2%	Ashford	509	1%
<i>London – total</i>	<i>18,409</i>	<i>43%</i>	<i>London – total</i>	<i>8,462</i>	<i>19%</i>

Source: Census 2011

- 2.23 Tunbridge Wells represents a more self-contained economic geography, with 50% of all residents in employment working within the Borough. Residents do, however, also commute elsewhere, with an equal proportion of residents commuting to Tonbridge and Malling and Westminster. Sevenoaks has a lower level of containment at 30%, with 13% of residents commuting to work in Westminster or the City of London.
- 2.24 While this is a prevalent trend across the South East, Tunbridge Wells and particularly Sevenoaks contain amongst the largest proportion of employed residents commuting to work in Westminster or the City of London. Sevenoaks ranks second of the South East authorities, with only Elmbridge (14%) sharing a stronger commuting relationship with these Boroughs. Tunbridge Wells ranks seventh of the region's 67 local authorities<sup>14</sup>.
- 2.25 Indeed, wider Greater London clearly represents an important place of work for residents of both authorities. A total of 18,409 residents commute from Sevenoaks to London<sup>15</sup>, representing 43% of all employed residents, while a slightly smaller proportion (19%, or 8,462 residents) commute from Tunbridge Wells to the capital.
- 2.26 When considering residents across the two authorities in composite in the following graph, the importance of central London as a place of work is clear. Around one in ten residents of the combined area commute to work in Westminster or the City of London, which is the main employment destination outside of Sevenoaks and Tunbridge Wells.

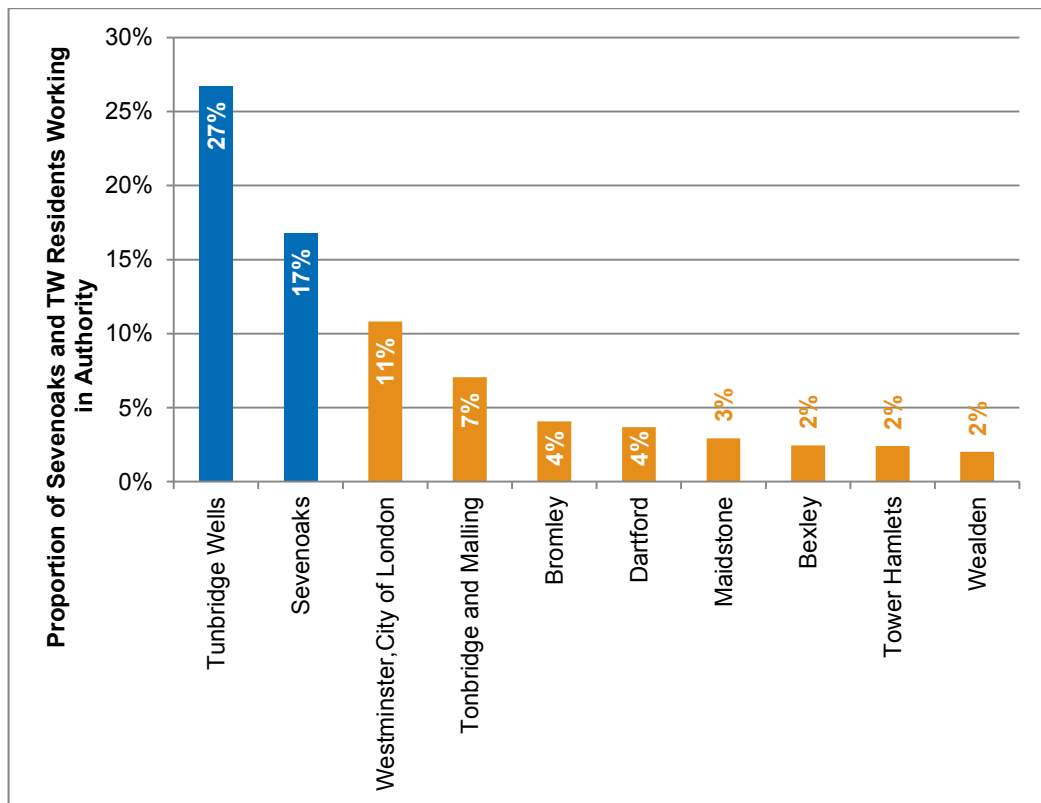
<sup>12</sup> Includes City of London

<sup>13</sup> Includes City of London

<sup>14</sup> Behind Elmbridge, Sevenoaks, Epsom and Ewell, Tandridge, Chiltern and Dartford

<sup>15</sup> Includes London Boroughs which are not amongst the ten main places of work for residents (shown in Table 2.2)

**Figure 2.7: Place of Work for Residents of Sevenoaks and Tunbridge Wells 2011**

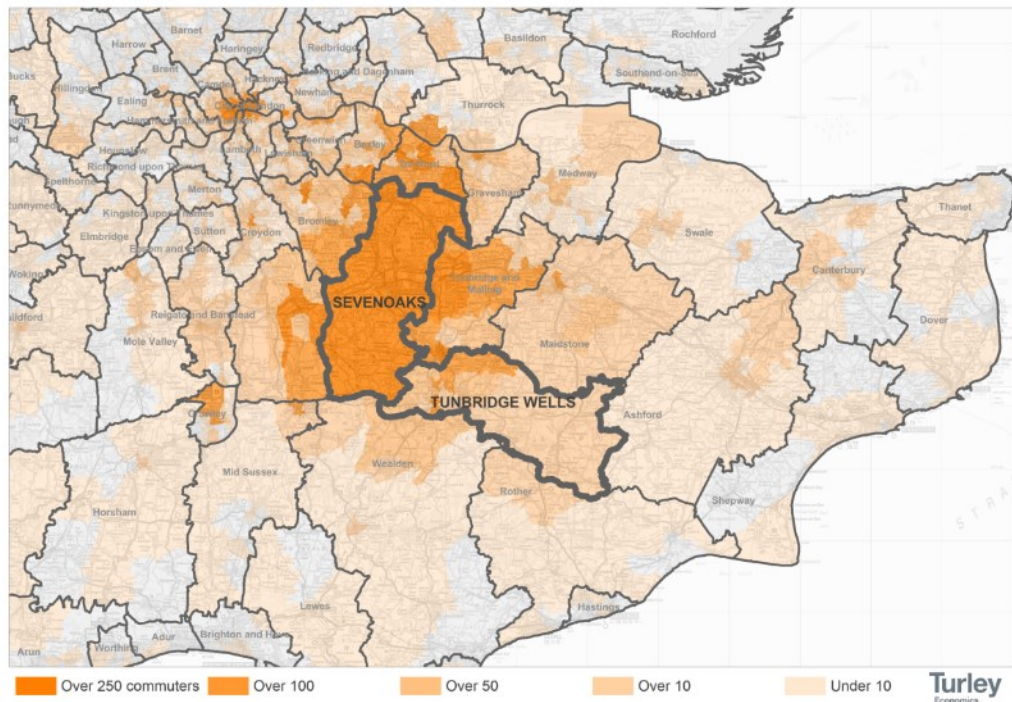


Source: Census 2011

- 2.27 A more local understanding can be gained from the Census, with the following plan showing that many residents of Sevenoaks commute north to Dartford and south east London. This reflects transport infrastructure in the District, with the M25 providing access to the north and a regular rail service serving central London. Notably, there is a limited flow of people from Sevenoaks to Tunbridge Wells.



**Figure 2.8: Place of Work for Residents of Sevenoaks 2011**



Source: Census 2011; Turley, 2016

- 2.28 A slightly different pattern is evident for Tunbridge Wells, as shown in Figure 2.9. A sizeable number of residents work within the Borough, with people commuting to central London and other locations in Tonbridge Wells, Maidstone, Wealden and Crawley.



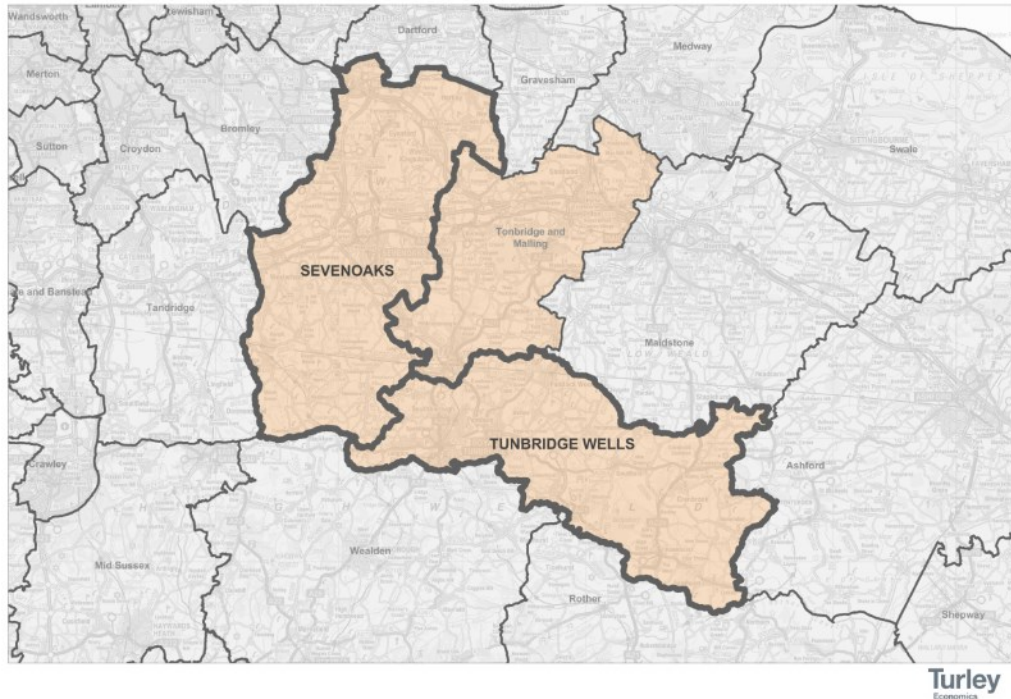


Borough (Tonbridge) sharing a relationship with the area. The eastern part of the Borough including the 'Malling' area has a greater functional relationship with Maidstone. The SHMA therefore considers needs across Sevenoaks District and Tunbridge Wells Borough only, albeit using a consistent methodology to that used by Tonbridge and Malling, Maidstone and Ashford Councils. It also notes that the areas show a strong relationship with Wealden and Rother.

### **Defining the Functional Economic Market Area**

- 2.32 The analysis in this section shows that Sevenoaks and Tunbridge Wells form part of a wider functional economic geography, with approximately half of jobs in the area taken by residents commuting in from elsewhere and only 44% of the authorities' residents working within Sevenoaks or Tunbridge Wells. The flow of commuters to London is an important characteristic of the local economy, with around 27,000 people commuting from the area to London (2011 Census). This flow is particularly evident for Sevenoaks, which is likely to reflect its proximity to the Greater London boundary and the established rail and road infrastructure that provides comparatively shorter journey times. Sevenoaks also draws upon a comparatively large labour force to support the local economy, with only 38% of jobs in the District taken by residents. Around one in ten people working in Sevenoaks live in neighbouring Tonbridge and Malling. While Tunbridge Wells Borough draws upon a more localised workforce, there is also an important inflow of commuters from Tonbridge and Malling and Wealden.
- 2.33 This relationship is also evidenced in the 2011 TTWAs published by ONS, which identify a self-contained economic geography centred around Royal Tunbridge Wells which extends to cover most of Sevenoaks and the neighbouring towns of Tonbridge and Crowborough. This geography is referenced in the SHMA as representative of a functional housing market area. However, when seeking to 'best fit' the TTWA geography to local authority boundaries to support plan making, the 'split' in Tonbridge and Malling creates a challenge given that the 'Malling' area shares a stronger relationship with Maidstone.
- 2.34 Tonbridge and Malling does, however, form a key part of the wider West Kent sub-regional economy, with an established partnership in place to support the area's economic robustness and attract investment. The PPG suggests that such administrative partnerships can provide a basis for defining the FEMA, with the South East LEP and Kent & Medway Economic Partnership areas also forming important strategic geographies in this regard.
- 2.35 The evidence presented in this report suggests that while Sevenoaks and Tunbridge Wells form part of a wider regional economy, within which many areas share important economic relationships with London. There is also a more localised geography that has historically functioned as a sub-regional economy and which shares similar economic characteristics. In order to reflect this local context, therefore, this report considers that Sevenoaks and Tunbridge Wells share a functional economic market area with the local authority area of Tonbridge and Malling. This is considered particularly important given the proximity of the town of Tonbridge to the main settlements of Sevenoaks Town and Royal Tunbridge Wells and the evidence of commuting patterns.
- 2.36 The FEMA is shown in Figure 2.10 below.

**Figure 2.10: Functional Economic Market Area**



Source: Turley, 2016

- 2.37 On this basis, while this study focuses on assessing the needs for the two commissioning authorities of Sevenoaks and Tunbridge Wells, this is contextualised where appropriate with an understanding of the West Kent and wider economic geographies.

### Key messages

2.38 To summarise:

- The PPG states that economic needs should be assessed in relation to the relevant Functional Economic Market Area (FEMA), although there is no standard approach to defining such a geography.
- Sevenoaks and Tunbridge Wells form part of several established economic geographies and partnerships, including the South East Local Enterprise Partnership (LEP), Kent and Medway Economic Partnership and West Kent Partnership. The latter which includes Tonbridge and Malling, has historically functioned successfully as a distinct sub-regional economy, with the Councils continuing to work in partnership to support businesses as well as growth and attract investment.
- Official 2011 Travel to Work Areas (TTWAs) published by ONS identify a single TTWA centred around Royal Tunbridge Wells which entirely covers Tunbridge Wells Borough and captures the majority of Sevenoaks District. This does, however, also extend to Tonbridge, Crowborough and surrounding villages, although there is a limited relationship with Surrey to the west. The northernmost

part of Sevenoaks falls within the London TTWA, indicating that the District shares an important functional relationship with the capital.

- This is supported by commuting data from the 2011 Census, which shows that around 27,000 people commute from Sevenoaks and Tunbridge Wells to London. However, half of residents working in Tunbridge Wells also live in the Borough, suggesting that the authority is a relatively more self-contained economically than Sevenoaks, where 70% of employed residents commute elsewhere to work.
- The 2015 Strategic Housing Market Assessment (SHMA) also considers a range of spatial data in order to define the housing market area across which housing needs should be assessed. This concludes that while there is a strong basis for considering needs in Sevenoaks and Tunbridge Wells collectively, the area is also influenced by the neighbouring settlements of Tonbridge and Crowborough. Both of which pose a challenge in strategic planning terms, given that both settlements sit within neighbouring authority areas, of which only parts fall within the SHMA area. The 'Malling' area sharing a stronger functional relationship with Maidstone, and south Wealden being a functional part of a SHMA area which includes Eastbourne.
- Notwithstanding this, on the basis of the evidence presented above, it is considered that Sevenoaks and Tunbridge Wells primarily share a functional economic market area with the local authority area of Tonbridge and Malling. This reflects evidence of commuting flows and has become defined as a sub-regional economy through the West Kent Partnership.

### 3. Policy and Strategy Context

- 3.1 This section presents an overview of the strategic economic context and policy relevant to Sevenoaks and Tunbridge Wells and the assessment of future economic needs. Consideration is first given to the national policy context. This is followed by further consideration of key policy and strategy drivers at a sub-regional and local level.

#### National Policy Context

- 3.2 HM Treasury published 'Fixing the Foundations'<sup>18</sup> in July 2015, which sets out the plan for increasing national productivity and creating a more prosperous nation. The plan establishes the importance of productivity growth alongside increased levels of employment, which is described as the key to achieving a stronger nation with richer families and improved living standards.
- 3.3 The Government's approach to raising national levels of productivity focusses on two elements:
- **Encouraging long-term investment** in economic capital, including infrastructure, skills and knowledge; and
  - **Promoting a dynamic economy** that encourages innovation and helps resources flow to their most productive use<sup>19</sup>.
- 3.4 These two high level drivers of productivity are based on fifteen topics identified as key for the delivery of lasting development and growth. These key points range from investing in business, skills, knowledge and economic infrastructure to ensuring flexible and fair yet competitive markets.

#### Sub-regional Policy Context

##### Local Enterprise Partnership (LEP)

- 3.5 The South East Local Enterprise Partnership (LEP) covers both Sevenoaks and Tunbridge Wells, as parts of a wider area consisting of East Sussex, Essex and Kent counties, as well as the unitary authorities of Medway, Southend and Thurrock. The South East LEP is the largest LEP outside of London, and was set up to drive economic growth across the area. The LEP is fully devolved in order to exert a greater influence on local communities, with local delivery partnerships covering Kent and Medway, East Sussex, Essex and Thames Gateway South Essex.
- 3.6 The LEP agreed a Growth Deal with Government in July 2014 – which was expanded in January 2015 – in order to meet the ambitions of the Strategic Economic Plan (SEP) by renewing the '*physical and intellectual capital of the South East*'<sup>20</sup>.

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<sup>18</sup> HM Treasury (July 2015) Fixing the Foundations: Creating a more prosperous nation

<sup>19</sup> *Ibid* – Page 7

<sup>20</sup> South East Local Enterprise Growth Deal (March 2015)

- 3.7 Reflecting the SEP which highlights that a lack of investment in transport can impact upon business costs, there is an initial focus upon transport infrastructure, in order to provide the foundation for accelerated growth across the LEP area. Local, national and private funding with a total investment of £632 million, will be brought together to focus on key priority areas identified in the SEP. These include:
- **Enhancing transport connectivity** to enable sites to be brought forward for development, alleviate congestion issues and increase the use of sustainable transport;
  - **Increasing business support and productivity** through a market-driven approach, focusing on small and medium enterprises. The investment in growth hubs in Kent and Medway and Southend is a key part of this priority;
  - **Raising local skill levels** to ensure that residents can take advantage of new economic opportunities, with a commitment to ensure that adult skills provision responds to the needs of business; and
  - **Supporting housing and development** in order to alleviate the pressure on housing supply, which is amongst the most severe in the country. Investment in transport will enable the development of housing sites, and local authorities will be encouraged to proactively work together to increase housing supply.
- 3.8 The Growth Deal is expected to support the creation of at least 45,000 jobs while allowing 23,000 homes to be built. This goes some way towards meeting the ambitions set out in the SEP<sup>21</sup>, which seeks to enable the creation of 200,000 sustainable private sector jobs over the decade to 2021 and increase completions by over 50% to deliver 100,000 new homes by 2021.
- 3.9 The SEP also identifies opportunities to rebalance the economy, moving away from its historic over-reliance upon the public sector and lower value industries such as wholesale, retail, accommodation and construction. The 'knowledge economy' is growing, with particularly strong growth in Kent. The SEP therefore, targets LEP wide growth in advanced manufacturing, life sciences and medical technologies, transport and logistics, low carbon environmental goods and services, creative, cultural and media industries and the visitor economy. The contribution of the rural economy is also acknowledged, given the declining traditional role of agriculture and emerging business opportunities relating to technology, forestry, energy, heritage and tourism.
- 3.10 Productivity in the South East LEP area has historically been lower than other parts of southern England, with growth in output lagging behind comparator areas (e.g. Oxford M4 and Cambridge M11 corridors). There is also a skills challenge, with the pool of suitably qualified people too small to support the growth of high value growth industries reliant upon science, technology, engineering and maths based skills.
- 3.11 Proposed investment in growth corridors also forms a key part of the SEP, with the A21 linking London with Tunbridge Wells via Tonbridge being considered to support the

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<sup>21</sup> South East LEP (2014) Growth Deal and Strategic Economic Plan

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creation of 9,000 jobs. This is identified as an opportunity to support the strong and diverse West Kent economy, with Royal Tunbridge Wells noted as containing one of the region's largest concentrations of digital and software businesses. The former Defence Science and Technology Laboratory (DSTL) site at Fort Halstead offers an opportunity for a new multi-use research and development facility.

- 3.12 The rollout of superfast broadband through the Broadband Delivery UK (BDUK) programme is benefiting both the urban and rural economy in west Kent and elsewhere in the county, with the Making Kent Quicker scheme currently being implemented by Kent County Council. This is expected to complete in 2017, having brought fixed line superfast broadband services to over 95% of residential and business premises.

### ***Growth Deal***

- 3.13 As part of the SEP, a Growth Deal for Kent and Medway was secured to achieve an investment of over £80 million over six years. Four key priorities for Kent and Medway were identified through the SEP:

- Achieve a substantial increase in the delivery of housing and commercial developments;
- Unlock economic growth through the delivery of transport and broadband infrastructure;
- Back business expansion through better access to finance and support; and
- Deliver the skills needed to support the local economy.

- 3.14 Investment will ensure that 49,000 homes are delivered over the next six years, with 60,000 new jobs unlocked at housing and commercial development sites and an additional 11,000 knowledge economy jobs created.

- 3.15 Growth of this scale will take advantage of Kent and Medway's major opportunities for expansion, following a sustained historic period of infrastructure investment and a successful partnership between local government and business. The sub-regional economy has changed significantly over the past twenty years, with the traditional industrial base eroded over the long term as a result of global economic change, and an increased dominance of small and medium enterprises.

### ***Growth and Infrastructure Framework***

- 3.16 The Kent and Medway Growth and Infrastructure Framework<sup>22</sup> (GIF) was published in September 2015 by Kent County Council, in order to strategically promote the delivery of housing and jobs growth, and outline the infrastructure required to facilitate this over the period to 2031. A review of the scale of growth planned at the time of the assessment indicates that the population of Kent and Medway could grow by approximately 293,300 over the period from 2011 to 2031, with 158,500 new homes delivered and 135,800 jobs created. However, it is important to note that this is predicated upon the delivery of 3,600 new homes in Sevenoaks and 5,900 new homes in Tunbridge Wells between 2011 and 2031, which represents a lower level of growth than identified within the authorities'

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<sup>22</sup> Kent County Council (2015) Kent and Medway Growth and Infrastructure Framework



respective objectively assessed need (OAN) set out in the latest Strategic Housing Market Assessment.

- 3.17 The economic growth of Kent and Medway is, dependent upon ongoing investment in infrastructure, as well as a growing housing stock to accommodate a growing workforce, many of whom are currently priced out of living and/or owning their own home in west Kent. In Sevenoaks, motorway congestion on the M25 and M26 at peak times has restricted movement, resulting in the inappropriate use of local roads, and there is also an identified need for an urban traffic management control (UTMC) in Sevenoaks town. Congestion is also identified as an issue on the A26 and A264 approaches to Royal Tunbridge Wells, with further congestion at Colts Hill on the A228 remaining an issue.
- 3.18 It is understood that the GIF will be reviewed on an annual basis and work is ongoing to produce a refresh of the document at the current time. It is recommended that the Councils engage with this process to ensure that the level of growth proposed within respective local planning policies is fully taken into account at this strategic scale.

### **West Kent**

- 3.19 West Kent is identified as one of four areas of focused investment in the SEP, alongside Thames Gateway Kent, East Kent and Maidstone. West Kent is described as '*one of the best places in the South East in which to start and grow a business*'<sup>23</sup>. The knowledge economy in the area is higher than in other parts of the county, with a diverse SME base with high potential for innovation and growth. There is a strong demand for development, with successful flagship developments occurring and good connectivity to strategic road and rail links.
- 3.20 Going forwards locations for growth will require careful selection given the constraints of the High Weald Area of Outstanding Natural Beauty and Metropolitan Green Belt. Congestion on local roads and a lack of available sites and premises have constrained the growth and development of businesses in recent years, and are challenges that need to be addressed.
- 3.21 Given the robustness of the economy and development values it is considered that relatively small levels of investment can unlock substantial private sector leverage. This is currently focused upon the major town centres and established business locations in the sub-region, of which those within Sevenoaks and Tunbridge Wells are summarised below;
- **Royal Tunbridge Wells** is described as a thriving town centre which is expected to see substantial housing growth and cultural investment. Measures are being introduced to tackle congestion at the A26 and A264 while also improving sustainable transport provision. The further completion of the North Farm highway masterplan could further unlock potential future allocations for employment growth. Improvements to Longfield Road completed in 2015 and the dualling of the A21 between Tonbridge and Pembury will also provide a significant enhancement to vehicular access;

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<sup>23</sup> South East LEP (2014) Growth Deal and Strategic Economic Plan (p166)

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- The location of **Swanley** provides an opportunity to improve the town to enable the development of new homes and employment space. Private sector interest is observed within the centre and southeast of the town, including a new business and enterprise hub; and
- At **Fort Halstead**, the opportunity to develop research-focused business is identified.

### *Priorities for Growth*

- 3.22 Strategies have also been developed through the West Kent Partnership, consisting of Sevenoaks District Council, Tunbridge Wells Borough Council and Tonbridge and Malling Borough Council. This has identified shared investment priorities, which have informed the development of sub-regional growth strategies and the SEP. The Partnership has an important relationship with the Kent and Medway Economic Board, which provides a conduit to the South East LEP.
- 3.23 The Partnership published its priorities for growth<sup>24</sup> in January 2014, which acknowledges the thriving business community in the area with a skilled workforce and a sizeable concentration of small and medium sized businesses. The sub-regional economy is seen to have performed strongly and resiliently through the recession, although the importance of further growth is recognised in the face of continued competition.
- 3.24 The high levels of inward investment over the past decade provides the scope to attract high value relocating businesses in the future, while there are a number of award winning and innovative large employers in the area. Unemployment is consistently low, although it is acknowledged that this can lead to future recruitment problems if basic qualifications and skills are not acquired. This could be exacerbated by the ageing population. The impact of high house prices in restricting the return of many young people from higher education is observed, while the loss of highly skilled commuters to London presents a challenge to local businesses.
- 3.25 The indigenous growth of businesses will be a key driver of growth in West Kent, with a need to support and nurture businesses with high growth potential. West Kent is seen to have a number of key sectors (creative/media industries, science and engineering, land-based and horticulture, construction, retail and distribution, financial services, social care and tourism and hospitality) which should be the focus of economic initiatives.
- 3.26 It is acknowledged that only a limited number of sites are currently available for development to achieve growth in West Kent, due to environmental constraints, and the importance of supporting these sites through the local planning process – and through the provision of infrastructure – is seen as paramount for this reason. In Sevenoaks, key growth locations at Fort Halstead, Broom Hill, Swanley town centre, New Ash Green village centre, Vestry Estate, Edenbridge and Sevenoaks town are identified, while Royal Tunbridge Wells town centre, North Farm, Paddock Wood and the urban area/SouthBorough are also seen as future growth locations in Tunbridge Wells.

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<sup>24</sup> West Kent Partnership (January 2014) West Kent Priorities for Growth



- 3.27 The rural economy – which presents a ‘*unique set of challenges*’<sup>25</sup> – also needs to be supported, and the West Kent LEADER programme provides grant support for rural businesses. This is seen to have provided much needed support to this diverse sector, with a new LEADER programme for 2015 to 2020 identified as a priority by the Partnership.

### ***The Case for West Kent***

- 3.28 More recently, further research was also commissioned by the Partnership to demonstrate that the success of West Kent generates benefits across the whole of Kent and Medway<sup>26</sup>. This includes a comparative analysis of the West Kent economy<sup>27</sup>, which shows that the sub-region makes a significant contribution to the productivity of the wider Kent and Medway economy, providing a strong source of growth, diversity and resilience which is central to the wider economic health and prosperity of the county.
- 3.29 West Kent is seen to have the strongest growth prospects – along with North Kent – although there are also significant constraints, limiting the area’s ability to accommodate new homes and businesses with large space requirements. This is likely to be a factor in the area being less favourably regarded as a location for inward investment – compared to Maidstone and Ashford for example – due to a relative lack of a choice of high quality sites for modern business operations. West Kent is seen to compete with other similar locations to the north, south and west of London, rather than other locations in Kent and Medway.
- 3.30 The success of West Kent in capitalising on its strengths and attracting inward investment is likely to benefit all of Kent and Medway, through supply chain linkages and additional job creation. West Kent also provides a large number of jobs for those from outside the area, providing relatively large numbers of high skilled and higher income jobs. Boosting the number of skilled jobs and workers is important to the long-term growth of the county’s economy.
- 3.31 The study did, however, find that regeneration investment per capita in West Kent fell below other areas of Kent and Medway, such as Maidstone, North Kent and East Kent. West Kent could therefore be disadvantaged by the operation of the county’s capital programme and Local Growth Fund, although it is acknowledged that funding has deliberately been weighted based on project outcomes and deliverability. In contrast, for example, West Kent is likely to benefit to a greater extent than other sub-regions from business support programmes, given the high representation of growth businesses and start-ups.

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<sup>25</sup> Ibid (p24)

<sup>26</sup> Wessex Economics (January 2015) The Case for West Kent

<sup>27</sup> Ibid (Appendix 1)

## Local Policy Context

### Sevenoaks District Council

#### *Core Strategy Development Plan Document (DPD)*

- 3.32 The Sevenoaks Core Strategy was adopted in February 2011 in order to guide the development of the District over the period to 2026. Upon adoption, there was a commitment to review the Core Strategy within five years in order to ensure consistently with the then-newly published NPPF. The Council is therefore in the process of producing additional evidence to inform the review, including this report, the SHMA and the commissioned Retail Study currently under preparation.
- 3.33 The Core Strategy acknowledges that the local economy has seen recent growth, although this was influenced by the economic downturn. Many businesses are small and in service or office based sectors, although there is a recognised issue in recruiting and retraining staff due to the high cost of housing and the higher salaries available elsewhere, particularly in London. The traditional role of agriculture is identified, with a recognition that farmers are diversifying through the re-use of existing buildings and the development of new enterprises outside of traditional farm uses.
- 3.34 Various issues and challenges are identified, including the need to meet development requirements within an area constrained by Green Belt, providing for future development of Sevenoaks and improving Swanley through regeneration to address issues of deprivation. The future of rural areas is also a key challenge, with a need to preserve the quality of these areas while meeting the needs of rural communities and ensuring that the rural economy can continue to sustainably develop. A broader supply of land is also needed to meet future business needs, with a primary focus on making effective use of existing employment land. The Core Strategy cites the previous Employment Land Review, which showed that there is a sufficient supply of sites largely in acceptable locations, although there was an identified need for modernisation. A future additional land requirement for between 0.3ha and 1.5ha was identified, with a view that this could be made up through intensification and use of vacant land.
- 3.35 There is a particular focus on the Sevenoaks urban area<sup>28</sup>, Swanley and Edenbridge, although in addition, there are also a number of Major Developed Employment Sites in the Green Belt – independent of existing settlements – which have built up over a number of years, which are all in commercial use and often pre-date the introduction of planning controls. These sites<sup>29</sup> form a significant part of the District's employment land supply.

#### *Allocations and Development Management Plan (2015)*

- 3.36 Sevenoaks District Council adopted an Allocations and Development Management Plan<sup>30</sup> (ADMP) in February 2015, which – alongside the Core Strategy – forms part of the Local Plan for the District. The ADMP establishes the provision of 79.6ha of employment land in Sevenoaks<sup>31</sup>, exclusive of Major Developed Employment Sites in the Green Belt. 75.5ha

<sup>28</sup> Consisting of Sevenoaks town and parts of adjoining parishes outside of the Green Belt as defined by the Core Strategy

<sup>29</sup> Chaucer Business Park; GlaxoSmithKline; North Downs Business Park; Fort Halstead

<sup>30</sup> Sevenoaks District Council (2015) Allocations and Development Management Plan

<sup>31</sup> Reduced from 86.1ha as a result of detailed boundary amendments

is formed of existing sites, with a new allocation of 4.1ha at Broom Hill, Swanley. The distribution between different areas of the District is summarised in Table 3.1.

**Table 3.1: Existing Employment Allocations in Sevenoaks**

	Number of sites	Total area (hectares)
Sevenoaks town	11	27.1
Swanley	10	22.1
Edenbridge	2	20.4
Other settlements	4	5.9
<b>Sevenoaks District</b>	<b>27</b>	<b>75.5</b>

*Source: Sevenoaks District Council, 2015*

- 3.37 The 27 sites presented above include a number of larger allocations, such as Station Road in Edenbridge (18.8ha), Vestry Road in Sevenoaks (11.3ha) and Wested Lane Industrial Estate in Swanley (8.2ha).
- 3.38 In addition to those set out above, Broom Hill – adjacent to the M25 in Swanley – is a longstanding employment land allocation, with the potential to drive the economic regeneration of Swanley. Furthermore, outside of the existing settlements, there are a number of Major Developed Employment Sites in the Green Belt which continue to play major employment roles in Sevenoaks. The ADMP acknowledges the changing policy context introduced through the NPPF, which no longer provides authorities with the opportunity to designate Major Developed Sites in the Green Belt, although three of the sites<sup>32</sup> are formally identified as important employment generating sites, which will be supported where proposals are consistent with Green Belt and policy on Areas of Outstanding Natural Beauty (AONB):
- **Fort Halstead** – a previously developed site within the Green Belt, originally a Ministry of Defence research establishment and still occupied by defence related industries. The largest employer (DSTL) has recently announced its intention to withdraw from the site by 2017/18, with the landowners intending to bring forward an application to redevelop the site for commercial and residential use. The ADMP is clear that any redevelopment should be employment-led, and maintain the site’s role to accommodate approximately 1,200 jobs; There is, however, no net increase in jobs associated with this proposal with the 1,200 jobs proposed being to replace those lost through DSTL’s decision to with draw from the site.
  - **Chaucer Business Park** – primarily used for transport and storage or general business use, with some manufacturing. There is no available developable land, but the Council promotes the continuation of the site in its current form; and

<sup>32</sup> GlaxoSmithKline closed site in 2010, with continued employment use not viable and residential-led mixed use development most appropriate

- **North Downs Business Park** – currently used for a range of activities, including manufacturing and other business uses. Continued use of the site in its current form is promoted.

### ***Sevenoaks Economic Development Strategy***

3.39 The Economic Development Strategy<sup>33</sup> sets out major priorities for economic development in Sevenoaks over the period from 2014 to 2017. This references the thriving local business community, and recognises that strong foundations are in place for future economic growth given the skilled nature of the workforce and the strong culture of entrepreneurialism. The excellent connectivity of the District is also cited as an important attraction for the commercial sector.

3.40 The strategy identifies seven strategic objectives, summarised below:

- **Inward investment** – in order to ensure that the District can continue to attract strong levels of investment, the strategy states that employment land should be strictly protected, recognising that there is significantly less commercial property available in the District compared with other areas of Kent. It is noted that the District's existing businesses largely want to stay within Sevenoaks, and therefore the importance of providing office space of a suitable size and quality to ensure that business needs are met;
- **Skills and support** – provision of more affordable housing is seen as key to keeping younger and economically active people within the workforce. There is also an identified need to work with businesses to identify skills gaps, ensuring that this is met by education and skills providers;
- **Transport and infrastructure** – infrastructure is seen as vital to the continuing economic growth of Sevenoaks, with investment in transport, flood protection and mobile and superfast broadband connectivity supported in the strategy;
- **Energy and sustainability** – ensuring that businesses can access training and funding opportunities to increase energy efficiency;
- **Places for growth and improvement** – a number of areas of Sevenoaks were identified for improvement, based on consultation of corporate plans, emerging Local Plans and the business community. This includes Swanley, Fort Halstead, New Ash Green village centre, Sevenoaks town centre and Bat and Ball. The improvement and redevelopment of these areas is an aim to be progressed by the Council and its partners;
- **Rural economy** – a significant part of the District's economic output, there is a broad and diverse rural economy, which will be supported in maintenance and diversification through local planning policies, provided that development is compatible with the Green Belt. The District also has some of the highest levels of homeworking, self-employment and home businesses; and

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<sup>33</sup> Sevenoaks District Council (2014) Economic Development Strategy

- **Tourism** – tourism is a major contributor to economic viability and growth in Sevenoaks, with the industry worth over £230 million to the local economy and supporting over 4,250 jobs. The Council will support tourism investment, and will work with local businesses to facilitate growth and marketing.

### ***Swanley and Hextable Masterplan***

- 3.41 The Council is currently preparing a masterplan which will guide future improvements to Swanley and Hextable. This will identify options for improving the town centre, open spaces, leisure facilities, shops, business space, transport and new homes in both towns. The draft masterplan will be subject to public consultation between September and November 2016. The masterplan will help to achieve the ambitions and objectives of the Council and the West Kent Partnership.

### **Tunbridge Wells**

#### ***Tunbridge Wells Borough Local Plan (March 2006)***

- 3.42 The Tunbridge Wells Borough Local Plan<sup>34</sup> was adopted in March 2006, and a number of policies – including all covering economic development – have been saved following adoption of the Core Strategy summarised below.
- 3.43 The plan acknowledges the buoyance of the local economy – with concentrations of employment in Royal Tunbridge Wells, Southborough and Paddock Wood – and partly attributes this to the proximity of London. Adoption of the plan had been preceded by a period of sustained growth in employment opportunities, with the service sectors accommodating a substantial proportion of workers. The dispersal of non-agricultural employment throughout the rural area of the Borough is also identified, with an aim to support the rural economy.
- 3.44 The Local Plan was prepared within the context of regional guidance, with the 1996 Kent Structure Plan and 2006 Kent and Medway Structure Plan identifying West Kent as an area of restraint, due to Green Belt and environmental constraints. There was a noted regional concern that the rate of economic development expansion in the area could exacerbate labour supply issues, transport constraints and lead to overheating of the local economy.
- 3.45 In alignment with strategic advice, the Local Plan sought to concentrate larger scale economic development within the urban areas of Royal Tunbridge Wells and Southborough, with respective town centres and Economic Development Areas<sup>35</sup> (EDAs) the main area of focus. In addition, Paddock Wood was identified as an area which could accommodate general industry and warehousing development, given its strategic location close to rail and road links. The Local Plan also sought to allocate a site for B Class employment uses located at Gills Green in between Cranbrook and Hawkhurst to provide an opportunity for residents to work locally and reduce out-commuting. Villages were also

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<sup>34</sup> Tunbridge Wells Borough Council (2006) Tunbridge Wells Borough Local Plan

<sup>35</sup> Main concentrations of economic development activity in the plan area outside of town centres, as well as sites allocated for economic development in industrial estates on the edge of Royal Tunbridge Wells, Southborough and Paddock Wood, and all economic development allocations where less intensive forms of business and industrial development are focused and where the capacity exists for further development or redevelopment

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deemed appropriate locations for small-scale economic development activity, while appropriate rural buildings could also be converted to facilitate economic development.

3.46 Policy ED4 sets out five sites allocated for economic development, primarily:

- Land north of Kingstanding Way, Royal Tunbridge Wells;
- Land south of Dowding Way, Royal Tunbridge Wells;
- Land west of Maidstone Road, Paddock Wood;
- Land at the former Hawkhurst Railway Station, Gills Green; and
- Land at Brook Farm, Capel.

### ***Tunbridge Wells Borough Core Strategy (June 2010)***

3.47 The Tunbridge Wells Borough Core Strategy<sup>36</sup> was adopted in June 2010, and forms part of the Council's Local Development Framework (LDF) which provides an overall spatial vision and strategic objectives for the future development of the Borough to 2026.

3.48 The provision of sufficient developable and deliverable land to meet the Borough's local and strategic employment requirements is a strategic objective within the Core Strategy, with an objective to focus development at Royal Tunbridge Wells to stimulate and sustain its economic growth and competitiveness as a regional hub which also provides business opportunities for local people. There will also be a need to support the rural economy, by protecting and enhancing the vitality and viability of small rural towns, neighbourhood centres, village centres and the wider rural area.

3.49 Core Policy 7 seeks to maintain the existing net supply of employment floorspace within the Borough over the decade to 2016, for conformity with the South East Plan. There is, however, an acknowledgement that further regional evidence could require a review of this position. The allocation of sites falls outside of the Core Strategy, and therefore the sites allocated by the 2006 Local Plan continue to apply.

3.50 The Core Strategy however does designate the strategic Key Employment Areas, which are areas identified for the retention and encouragement of new employment floorspace and broadly reflect the previously designated Economic Development Areas, with the addition of Royal Tunbridge Wells Town Centre. These are defined as follows:

- Royal Tunbridge Wells Town Centre;
- North Farm/Longfield Road industrial area, Royal Tunbridge Wells;
- High Brooms Industrial Park, SouthBorough;
- Eldon Way and west of Maidstone Road, Paddock Wood;
- Transfesa Road East and West, Paddock Wood;

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<sup>36</sup> Tunbridge Wells Borough Council (2010) Tunbridge Wells Borough Local Development Framework – Core Strategy Development Plan Document

- Former Hawkhurst Railway Station and sidings, Gills Green; and
- Brook Farm, Capel.

### ***Emerging Site Allocations DPD***

- 3.51 The Site Allocations Development Plan Document (DPD) was submitted to the Secretary of State for Examination in June 2015. During the course of the hearing sessions, the Council proposed a number of modifications to the DPD, which were subject to consultation<sup>37</sup> in early 2016.
- 3.52 While the DPD will replace and supersede the site allocation policies in the 2006 Local Plan upon adoption, the DPD acknowledges that the Core Strategy – and the DPD itself – is based on housing and employment figures set out in the South East Plan, which was revoked by Government in March 2013. There is therefore a commitment to review these figures early in the plan period, with the Council commencing work on a new Local Plan at the current time which this study will inform.
- 3.53 The Site Allocations DPD cites the October 2010 Employment Land Review Update<sup>38</sup>, which reviewed supply in the Borough and concluded that sufficient capacity existed within the existing employment areas to accommodate future growth.
- 3.54 The Site Allocations DPD defines the spatial extent of the Key Employment Areas set out in the Core Strategy, while two further Areas of Change<sup>39</sup> are identified within Royal Tunbridge Wells town centre as locations which can enhance the local economy through mixed use development. Two further allocations<sup>40</sup> are also made to support Core Policy 7.

### ***Retail and Leisure Study Update 2014***

- 3.55 While this Economic Needs Study is principally focused on employment premises in B class uses, it is recognised that the retail sector makes an important contribution to the local economy, which is assessed separately. The emerging Site Allocations DPD introduces an updated retail requirement compared to that planned within the Core Strategy, based on the findings of the Retail and Leisure Study Update<sup>41</sup> published in 2014. While the Core Strategy sought to provide approximately 26,500sqm of retail space in the Borough over the plan period, this has been increased to 34,100sqm in the emerging Site Allocations DPD, of which over 95% (32,600sqm) is planned in the main urban area of Royal Tunbridge Wells and SouthBorough.
- 3.56 This reflects its role as the main retail and leisure destination in the Borough, and also responds to a need to support further investment in the town to strengthen its position in light of competition from out-of-town retailers and other shopping destinations outside of the Borough.

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<sup>37</sup> Tunbridge Wells Borough Council (2016) Site Allocations DPD – Submission Draft (incorporating main and additional modifications)

<sup>38</sup> GVA Grimley (2010) Employment Land Review Update

<sup>39</sup> Crescent Road/Church Road and Vale Avenue

<sup>40</sup> 77 Mount Ephraim (Sturge House, Brockborne House), Mount Pleasant Avenue Car Park

<sup>41</sup> PBA (2014) Tunbridge Wells Borough Council Retail and Leisure Study Update



### Key messages

3.57 To summarise:

- There is a substantial body of policy and strategic documents which will inform and guide the future economic development of Sevenoaks and Tunbridge Wells.
- The South East LEP is currently driving investment in transport infrastructure in order to support accelerated growth and meet the strategic ambitions of the region. This can capitalise on the opportunity to rebalance the regional economy, away from an historic over-reliance upon the public sector towards the growing 'knowledge economy'.
- Within the South East LEP, there are major opportunities for growth of the Kent and Medway economy, with a recent sustained period of investment in infrastructure and a successful partnership between local government and business.
- The strength and robustness of the West Kent economy is acknowledged by the LEP, given the sizeable knowledge economy and diverse base of SMEs in innovation and growth sectors, although there is also recognition that the supply of development sites is limited by environmental constraints. The rural economy also makes a significant contribution to the sub-regional economy.
- Adopted local planning policy in Sevenoaks seeks to direct employment development towards Sevenoaks Urban Area, Swanley and Edenbridge, although there are also a number of independent Major Developed Employment Sites which form a significant part of the employment land supply but are located within the Green Belt. The need to support the sustainable development of the rural economy is also acknowledged.
- In Tunbridge Wells the current policy position is to maintain the existing net supply of employment space within the Borough, with the 2006 Local Plan allocating new employment space in Key Employment Areas.



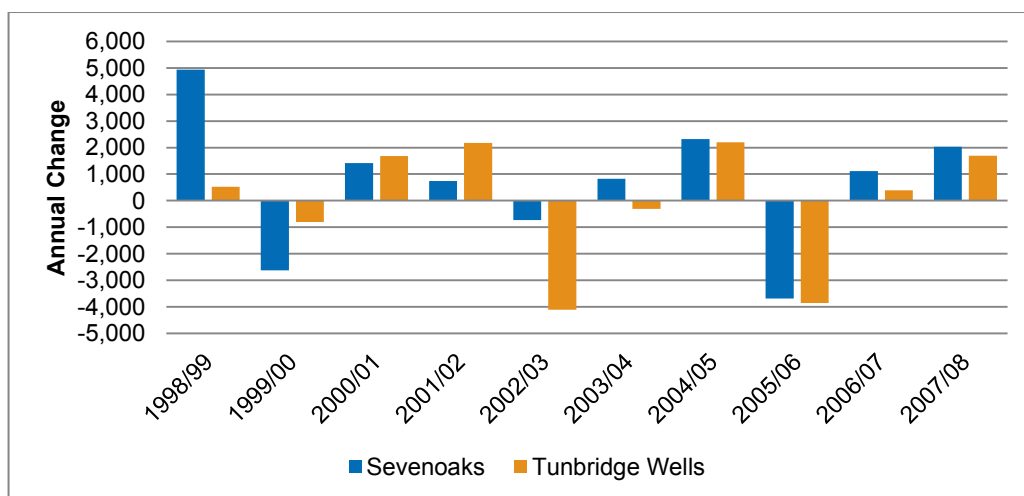
## 4. Economic Baseline

- 4.1 This section assesses the current composition of the Sevenoaks and Tunbridge Wells economies and performance against a number of key economic and labour market indicators. This includes a review of historic trends relating to employment based on jobs held by people working in each authority, the business base and sectorial change. This enables the identification of local drivers of change and an assessment of the area’s track record in delivering growth in the pre and post 2008-2010 recessionary periods.
- 4.2 The analysis covers the local administrative geographies of Sevenoaks and Tunbridge Wells and the FEMA, seeking to compare these with South East and national averages. It draws on a range of data sources including the Census (2001 and 2011), Annual Population Survey (2014/15), Business Register and Employment Survey (2014), and published economic forecasts, including the East of England Forecasting Model and Experian.

### Employment trends

- 4.3 Understanding historic growth trends and the current structure of the economy provides an indication of how the local economy has changed over recent years, and also suggests how employment growth may be achieved in future.
- 4.4 Data from the Annual Business Inquiry (ABI) is available to cover the pre-recession period from 1998 to 2008. Figure 4.1 shows annual change in the number of employees working in both Sevenoaks and Tunbridge Wells. This shows there was an overall increase in the number of jobs in Sevenoaks District over this period, equivalent to 6,359 jobs or 17.3%, which is significant compared to Tunbridge Wells where there was an overall decline of 0.9% or a loss of 419 jobs from 1998 to 2008. Whilst most years saw an increase in the number of jobs, periods of decline are evident, most notably in 2005/06.

**Figure 4.1: Historic Change in Employees 1998 – 2008**

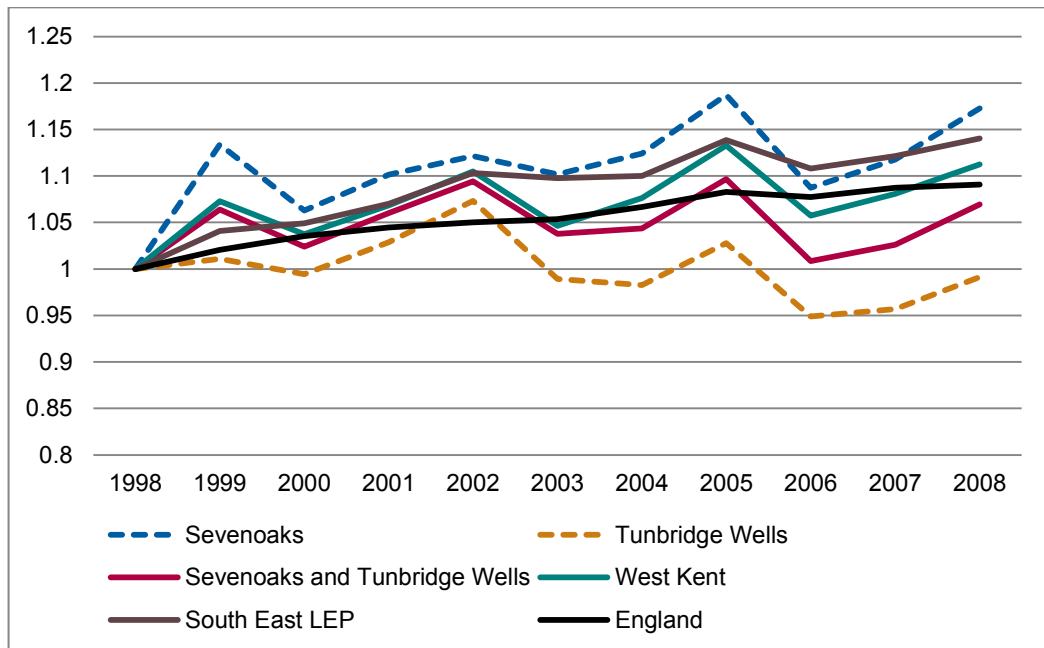


Source: ABI

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- 4.5 Figure 4.2 compares this change to the national and regional rate as well as FEMA and the wider county, by indexing change to 1998. This illustrates the historical underperformance of the Tunbridge Wells economy relative to the comparator areas. In contrast, the Sevenoaks economy generally performed above average compared to West Kent, the South East LEP area and England, with the exception of a slight decline in 2006.

**Figure 4.2: Indexed Change in Employees 1998 – 2008**



Source: ABI

- 4.6 Change broken down by sector is summarised in the following table, based on the 2003 Standard Industrial Classification (SIC). The table suggests that both Sevenoaks and Tunbridge Wells saw significant levels of decline within the manufacturing sector, although the level of decline was more prominent in Sevenoaks. A notable decline in the transport, storage and communication; financial intermediation and public administration and defence and compulsory social security sectors is also apparent across both authorities, although greater levels of decline were apparent in Tunbridge Wells. Tunbridge Wells also experienced decline of 24.3% of employees in the agriculture, hunting and forestry sector, whilst Sevenoaks saw an increase in the sector of 17.0%.
- 4.7 Over the period from 1998 to 2008 Sevenoaks saw a notable increase in construction, hotels and restaurants, education, real estate, renting and business activities. Tunbridge Wells saw the greatest levels of increase in employees in real estate, renting and business activities, education and other community, social and personal service activities.

**Table 4.1: Historic Change in Employees by Sector 1998 – 2008**

Sector (SIC2003)	Sevenoaks		Tunbridge Wells	
	Total Change	% Change 1998 – 2008	Total Change	% Change 1998 – 2008
Agriculture, hunting and forestry	131	17.0%	-354	-24.3%
Fishing	0	0.0%	-	-
Mining and quarrying	-	-	-	-
Manufacturing	-1,176	-24.9%	-804	-19.7%
Electricity, gas and water supply	-	-	-	-
Construction	1,474	67.1%	-97	-5.1%
Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	-681	-7.8%	-269	-2.6%
Hotels and restaurants	1,867	103.8%	856	39.7%
Transport, storage and communication	-402	-21.8%	-1,920	-53.8%
Financial intermediation	-265	-20.6%	-1,506	-35.7%
Real estate, renting and business activities	3,758	66.0%	2,287	34.2%
Public administration and defence; compulsory social security	-381	-19.1%	-747	-38.2%
Education	1,261	48.6%	1,032	28.5%
Health and social work	594	22.0%	255	3.8%
Other community, social and personal service activities	245	10.3%	870	46.7%
Private households with employed persons	0	0.0%	0	0.0%
Extra-territorial organisation and bodies	0	0.0%	0	0.0%
<b>Total</b>	<b>6,359</b>	<b>17.3%</b>	<b>-419</b>	<b>-0.9%</b>

Source: ABI

- 4.8 The ABI was replaced by the Business Register and Employment Survey (BRES) from 2009, and while not directly comparable with the ABI data this allows an assessment of more recent change in employment across the study area. Table 4.2 shows that the number of employees has grown at a faster rate in Tunbridge Wells, by 2,120 employees per annum, than Sevenoaks, at 640 employees per annum. This differs to the trends identified above where Sevenoaks demonstrated higher levels of employee growth over the period from 1998 to 2008.

**Table 4.2: Historic Change in Employees 2009 – 2014**

	2009	2010	2011	2012	2013	2014	Average per annum
Sevenoaks	41,200	43,900	44,500	43,200	45,400	44,400	-
Change	-	2,700	600	-1,300	2,200	-1,000	640
Tunbridge Wells	46,800	48,000	48,300	47,800	47,200	57,400	-
Change	-	1,200	300	-500	-600	10,200	2,120

Source: BRES

### Employment by Sector

- 4.9 Table 4.3 summarises more recent change by sector, illustrating sectors which have seen the greatest absolute change in employees since 2009.
- 4.10 The greatest increase in employees was seen in the administrative and support service activities sector with an increase of around 700 employees, accounting for a proportional increase of 21.9%. This was closely followed by the human health and social work activities sector which saw an increase of circa 600 employees or 16.3%. The greatest reduction in employees was seen in the manufacturing and professional, scientific and technical activities sectors circa 100 employees, accounting for a 4.0% reduction in employees in Sevenoaks, with a 1.4% reduction in Tunbridge Wells. A slight loss of employees was also seen in the mining and quarrying and construction industries.
- 4.11 In Tunbridge Wells, the construction and public administration and defence, and compulsory social security industries saw the greatest reduction in the number of employees (circa 500). The greatest increase in the number of employees was seen in the financial and insurance activities sector, with 5,800 additional employees in 2014 than 2009, an increase of 208.3%. There has also been significant growth in the number of employees in the administrative and support service activities (circa 2,200) and professional, scientific and technical activities (circa 1,600).

**Table 4.3: Absolute Change in Employees by Sector 2009 – 2014<sup>42</sup>**

Growth Sectors 2009 – 14	Total Change	Decline Sectors 2009 – 14	Total Change
<b>Sevenoaks</b>			
Administrative and support service activities	700	Manufacturing	-100
Human health and social work activities	600	Professional, scientific and technical activities	-100
Real estate activities	400	Mining and quarrying	0
Accommodation and food service activities	300	Construction	0
Wholesale and retail trade	300		
<b>Tunbridge Wells</b>			
Financial and insurance activities	5,800	Construction	-500
Administrative and support service activities	2,200	Public administration and defence; compulsory social security	-500
Professional, scientific and technical activities	1,600	Other service activities	-400
Accommodation and food service activities	1,000	Education	-400

Source: BRES

- 4.12 It is also important to recognise how the change in the number of employees over the period from 2009 – 2014 has changed in each sector proportionally, as set out in Table 4.4.
- 4.13 In Sevenoaks the greatest proportion of decline was in mining and quarrying, however as previously highlighted, the actual loss in the number of employees was minimal. The greatest proportional increase in employees was seen in the water supply, sewerage and waste management and electricity, gas, steam and air conditioning sectors, with 191.1% and 168.1% increase, respectively. There has also been a high proportional increase in the agriculture, forestry and fishing sector, by 42.3%.
- 4.14 In Tunbridge Wells, the greatest proportional decrease was seen in the agriculture, forestry and fishing sector (45.8%) and public administration and defence; compulsory social security (42.9%). The increase in the number of employees in the electricity, gas, steam and air conditioning supply sector was relatively low, yet equates to a significant proportional increase of 212.8%. The financial and insurance activities sector, however,

<sup>42</sup> Figures are rounded to the nearest 100.

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as highlighted previously has seen high growth in the number of employees, equating to a significant proportional growth of 208.3%.

**Table 4.4: Historic Change in Employees by Sector 2009 – 2014**

Growth Sectors 2009 – 14	% Change	Decline Sectors 2009 – 14	% Change
<b>Sevenoaks</b>			
Water supply; sewerage, waste management and remediation activities	191.1%	Mining and quarrying	-38.5%
Electricity, gas, steam and air conditioning supply	168.1%	Manufacturing	-4.0%
Agriculture, forestry and fishing	42.3%	Professional, scientific and technical activities	-1.4%
Real estate activities	39.1%	Construction	-0.4%
<b>Tunbridge Wells</b>			
Electricity, gas, steam and air conditioning supply	212.8%	Agriculture, forestry and fishing	-45.8%
Financial and insurance activities	208.3%	Public administration and defence; compulsory social security	-42.9%
Administrative and support service activities	84.3%	Water supply; sewerage, waste management and remediation activities	-26.7%
Professional, scientific and technical activities	43.8%	Construction	-26.3%

Source: BRES

- 4.15 ONS published jobs density estimates for 2013 in April 2015. Jobs density is defined as the number of jobs in an area divided by the resident population aged 16-64 in that area. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64.
- 4.16 Evidence suggests that the job densities in Sevenoaks and Tunbridge Wells are similar, at 0.81 and 0.80 respectively, and are broadly in line with the national average of 0.80, yet greater than the average across the South East LEP which is somewhat lower, at 0.72.

**Table 4.5: 2013 Job Density**

Geography	2013 Job density
Sevenoaks	0.81
Tunbridge Wells	0.80
Sevenoaks and Tunbridge Wells	0.81
West Kent	0.82
South East LEP	0.72
England	0.80

Source: ONS Job Density, 2015

- 4.17 It is also important to establish the current profile of employment, highlighting key sectors in the local economy. This is summarised in Table 4.6, and shows that the distribution, hotels and restaurants; banking, finance and insurance; and public administration, education and health sectors account for the greatest proportions of employment in Sevenoaks and Tunbridge Wells. In Tunbridge Wells, these sectors account for a significant 81.9% of employees, which is higher than Sevenoaks where the sectors support 69.6% of employees. In Sevenoaks the construction sector accounts for 9.9% of employees, this is almost 4 times the proportion of construction employees in Tunbridge Wells, at 2.6%.

**Table 4.6: Sectorial Profile 2014**

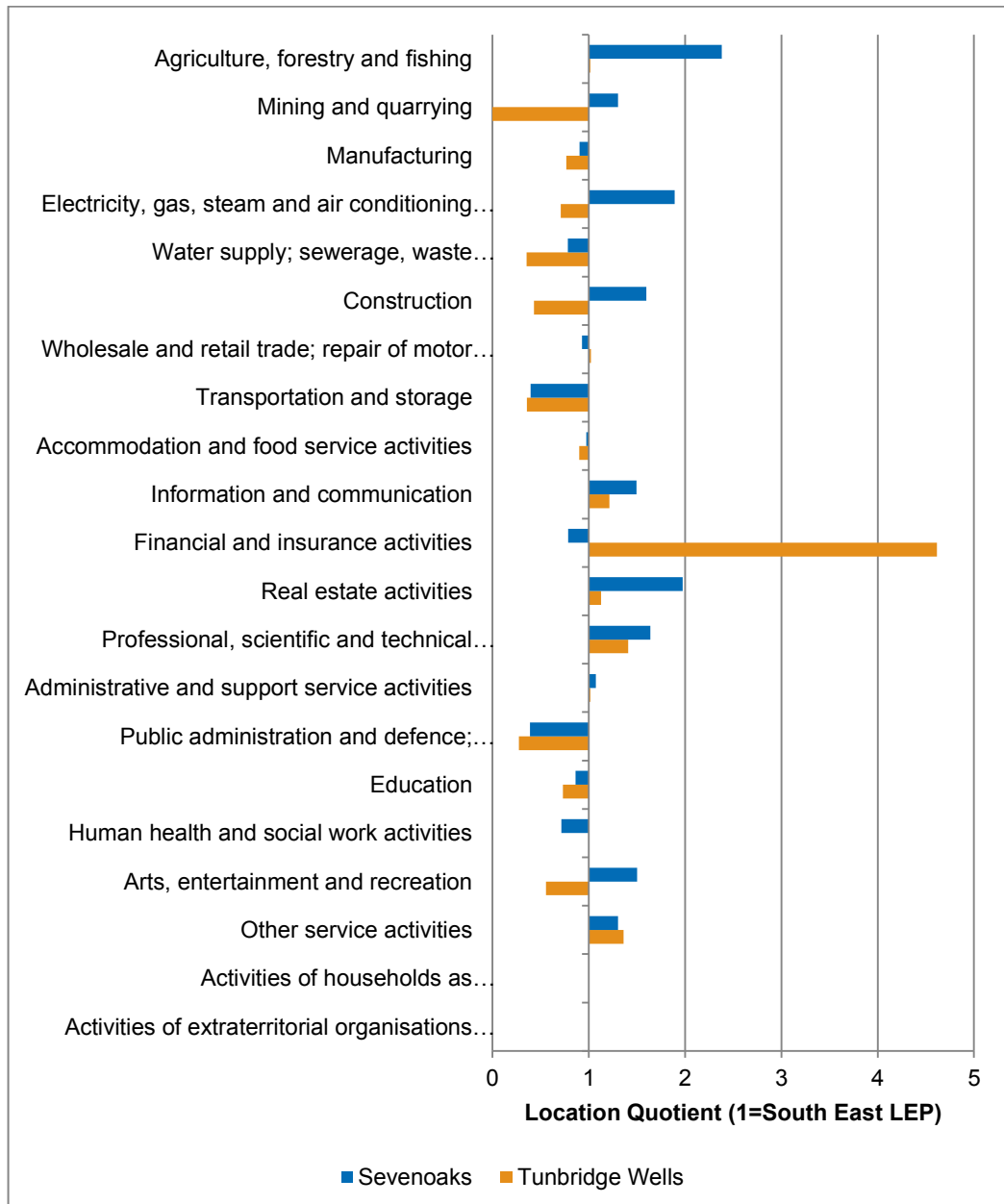
	Sevenoaks		Tunbridge Wells	
	Employees	%	Employees	%
Agriculture, forestry & fishing	200	0.5%	100	0.2%
Mining, quarrying & utilities	500	1.1%	300	0.5%
Manufacturing	2,800	6.3%	3,100	5.4%
Construction	4,400	9.9%	1,500	2.6%
Distribution, hotels and restaurants	10,800	24.3%	14,600	25.4%
Transport and communications	2,800	6.3%	3,100	5.4%
Banking, finance and insurance	11,200	25.2%	19,700	34.3%
Public admin. education and health	8,900	20.0%	12,700	22.1%
Other services	2,700	6.1%	2,300	4.0%
Total services	1,900	4.3%	2,000	3.5%
<b>Overall Total</b>	<b>44,400</b>	-	<b>57,400</b>	-

Source: BRES

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- 4.18 Finally, it is beneficial to understand how sectors are represented in Sevenoaks and Tunbridge Wells relative to the wider regional economy. The following charts present location quotients for both areas. This shows how the proportionate contribution of each sector in Sevenoaks and Tunbridge Wells in employment terms compares to the economy of the wider South East LEP. A quotient greater than 1 suggests that a sector is over-represented (specialised) relative to the wider area and a quotient less than 1 suggests under-representation.

**Figure 4.3: Location Quotients 2014**



Source: BRES

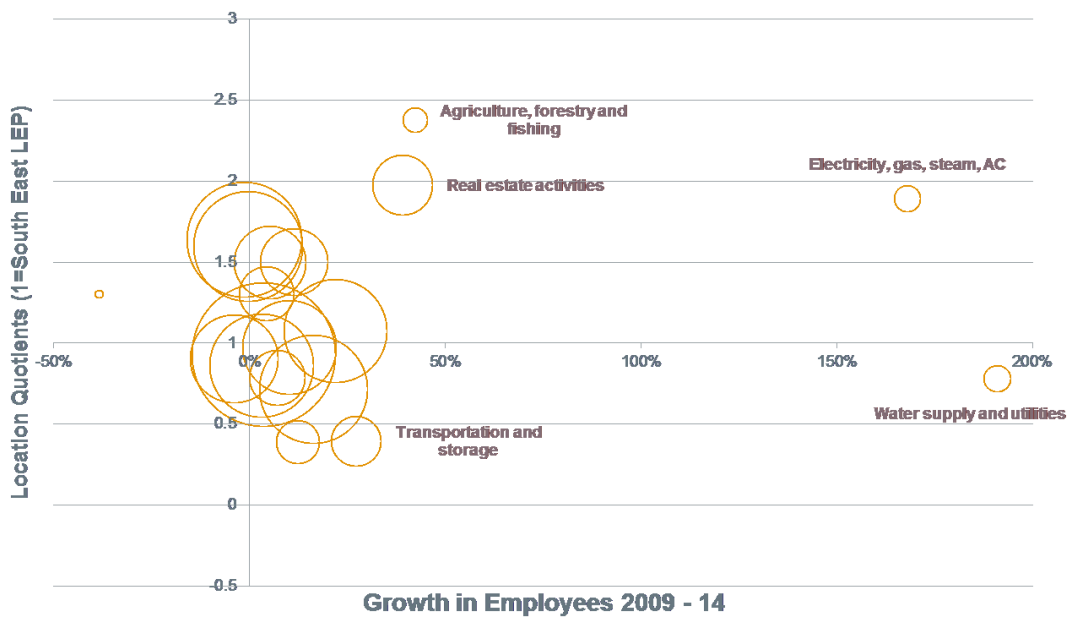
- 4.19 This shows that Tunbridge Wells has a particular specialism in the financial and insurance industry, with this representing a larger proportion of all employment than seen across the South East LEP. There is also a slight over-representation of professional, scientific and



technical activities. However, mining and quarrying industries, public administration and defence and transportation and storage are under-represented in the Tunbridge Wells economy. Sevenoaks has the greatest specialisms in agricultural industries, real estate, utilities and professional services, with transportation and storage and public administration under-represented in the local economy relative to the wider South East LEP.

- 4.20 The following charts build on this analysis factoring in growth in employees over the period from 2009 to 2014. This analysis is beneficial in understanding growing sectors which may either be over or under represented compared to the wider South East LEP economy. Building on the analysis presented above this highlights a number of highly represented growing sectors in Sevenoaks, including real estate activities; agriculture, forestry and fishing; and electricity, gas, steam and air-conditioning supply. This also shows that whilst the transportation and storage and water supply and utilities sectors are under-represented, both sectors have witnessed a degree of growth between 2009 and 2014.

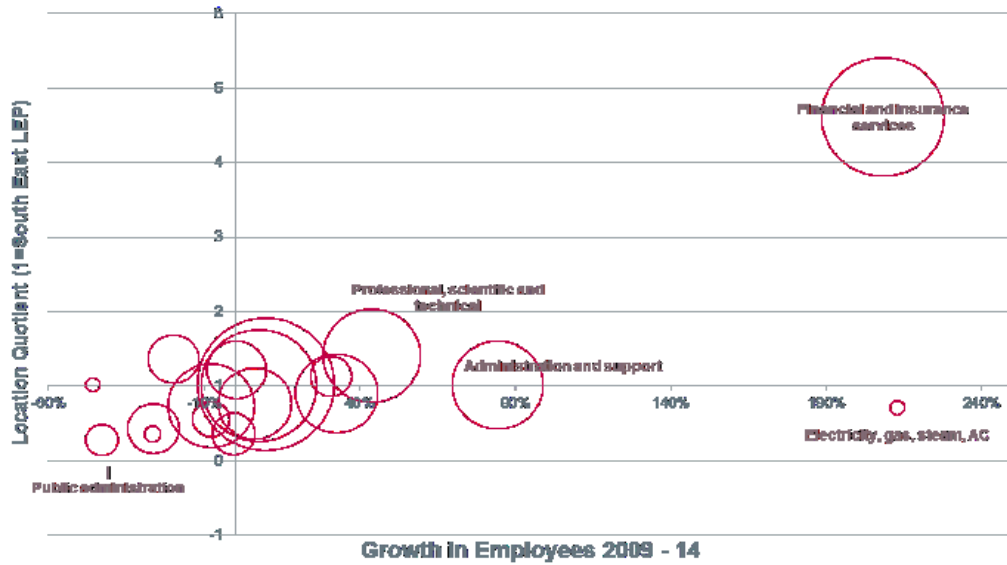
**Figure 4.4: Growth and specialisation – Sevenoaks**



Source: BRES and Turley Analysis

- 4.21 The chart below presents a similar analysis for Tunbridge Wells, highlighting the high growth and high representation in finance and insurance; professional, scientific and technical; and administration and support sectors. Like Sevenoaks the areas has also witnessed growth in electricity, gas, steam and air-conditioning supply sector. The sector is relatively small in both areas and is currently under-represented in Tunbridge Wells at present.

**Figure 4.5: Growth and specialisation – Tunbridge Wells**

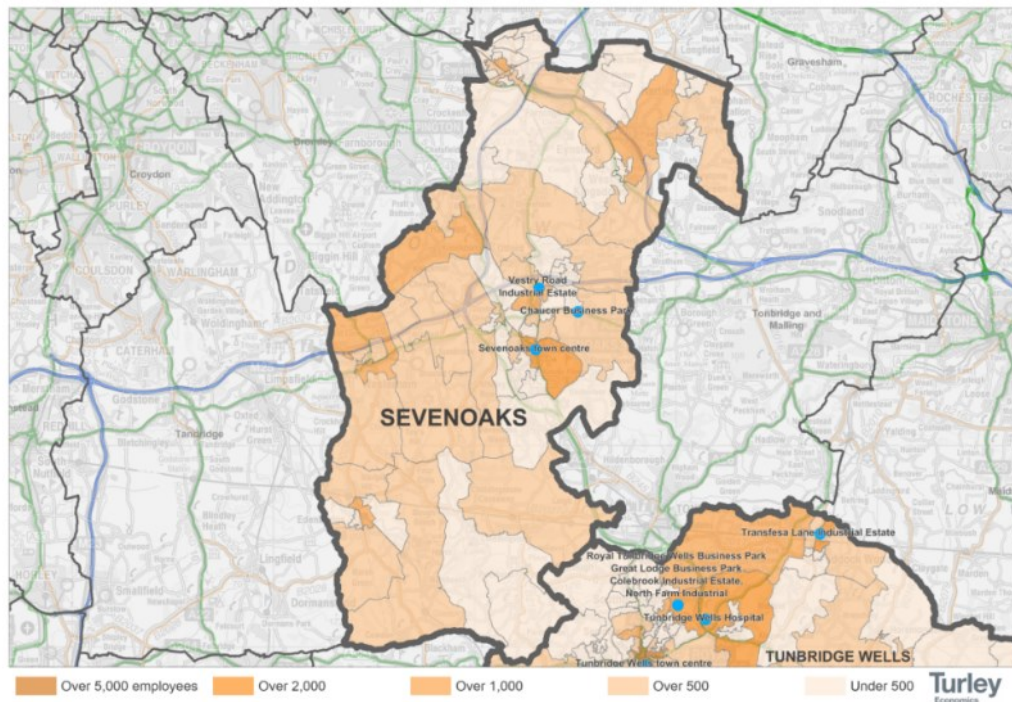


Source: BRES and Turley Analysis

**Spatial Distribution of Employment**

4.22 Evidence from BRES breaks down the number of employees by lower layer super output area (LSOA) in Sevenoaks and Tunbridge Wells, as presented in the following plans for both authorities. The town centres, principal industrial estates and other major employers are also illustrated for context. The LSOA covering Sevenoaks town centre contains over 2,000 employees, representing the main area of employment within the District. The area to the north of the town centre which includes the Vestry Road Industrial Estate also contains a concentration of employees.

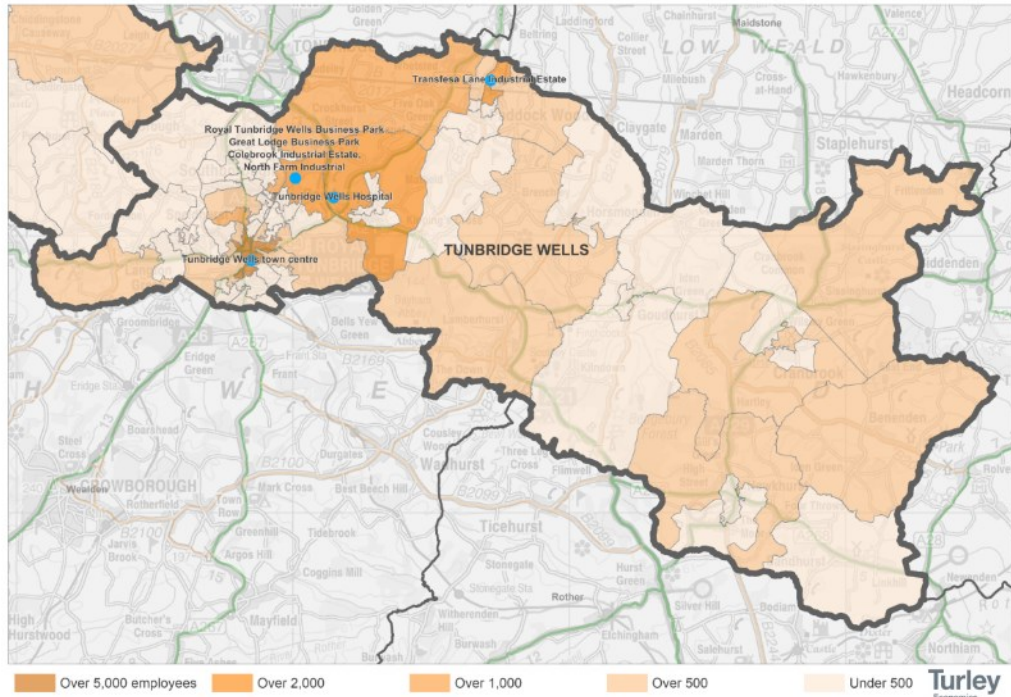
Figure 4.6: Sevenoaks Employees by LSOA 2014



Source: Turley, 2016; BRES, 2014

4.23 In Tunbridge Wells, again the greatest number of employees is concentrated within Royal Tunbridge Wells town centre, although there are also significant amounts of employees working at North Farm in Tunbridge Wells, Transfesa in Paddock Wood and the Tunbridge Wells Hospital in Pembury.

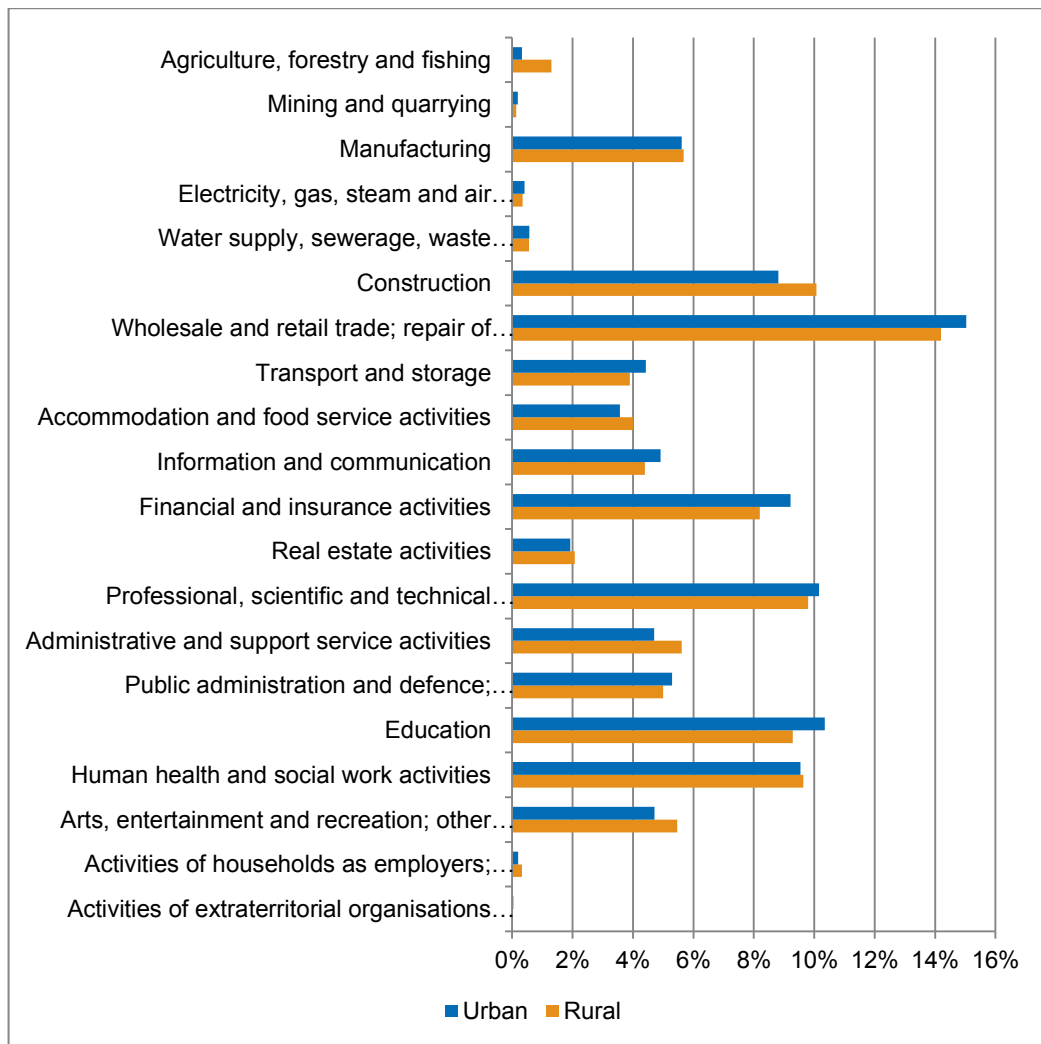
Figure 4.7: Tunbridge Wells Employees by LSOA 2014



Source: Turley, 2016; BRES, 2014

- 4.24 While BRES provides an indicator of overall employment in different areas of Sevenoaks and Tunbridge Wells, the 2011 Census provides further evidence on prevalent industries in rural areas of the authorities. This is based on the rural/urban classification applied by ONS, which indicates that 46% of employed residents in Sevenoaks live in rural areas and 38% of employed Tunbridge Wells residents live in rural areas.
- 4.25 The following chart shows the industry of employment for residents in urban and rural areas of Sevenoaks, highlighting that wholesale and retail, financial and insurance activities and education are more prevalent in urban areas of the District. Conversely, the construction industry plays a greater role in the rural economy, with agriculture, forestry and fishing, accommodation and food and administrative and support services also more prominent in rural areas of the District.

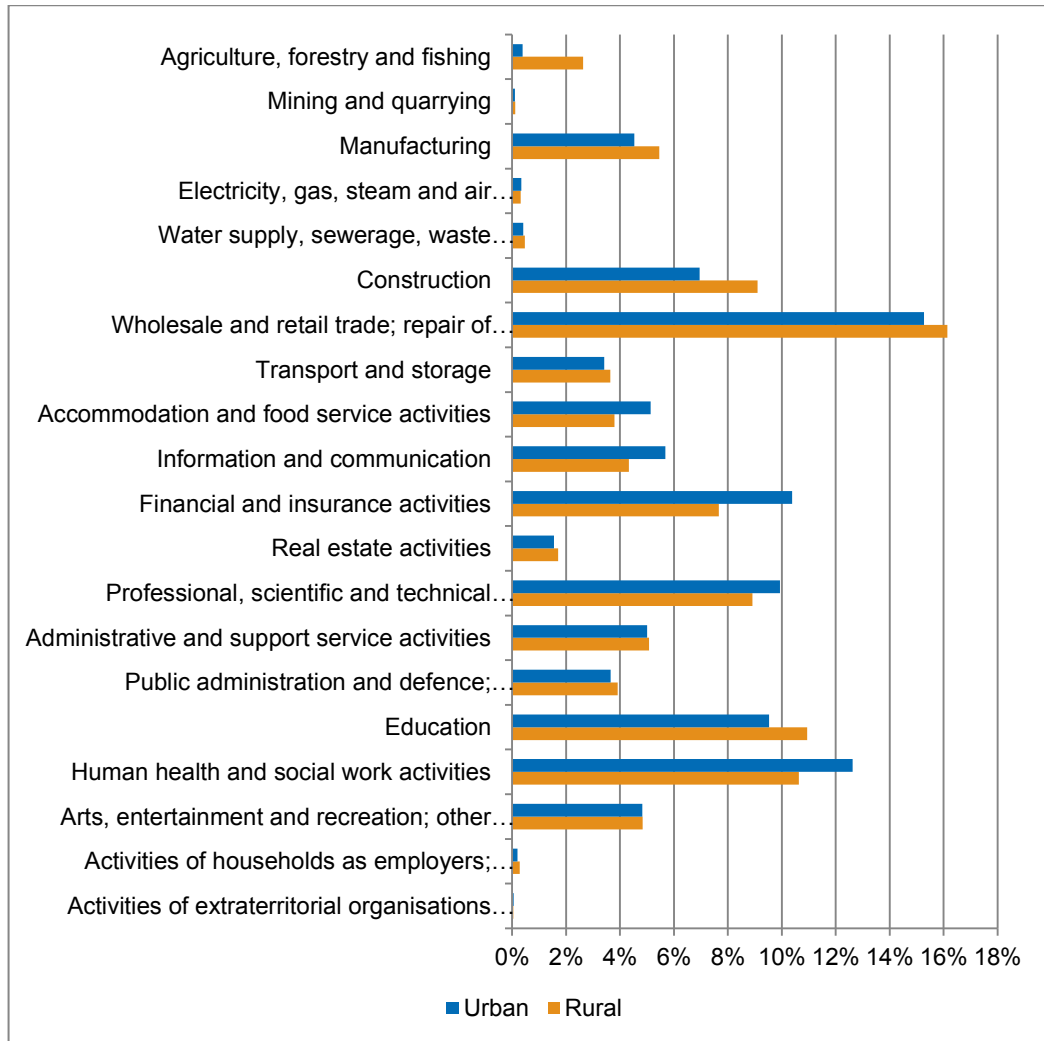
**Figure 4.8: Industry of Urban and Rural Employment in Sevenoaks 2011**



Source: Census 2011

4.26 A comparable analysis is presented below for Tunbridge Wells, highlighting the significant role of the agriculture, construction, education, manufacturing and wholesale and retail industries in rural areas of the District. Employment in urban areas is more skewed towards financial and insurance services, human health and social work activities, ICT and other professional services.

**Figure 4.9: Industry of Urban and Rural Employment in Tunbridge Wells 2011**



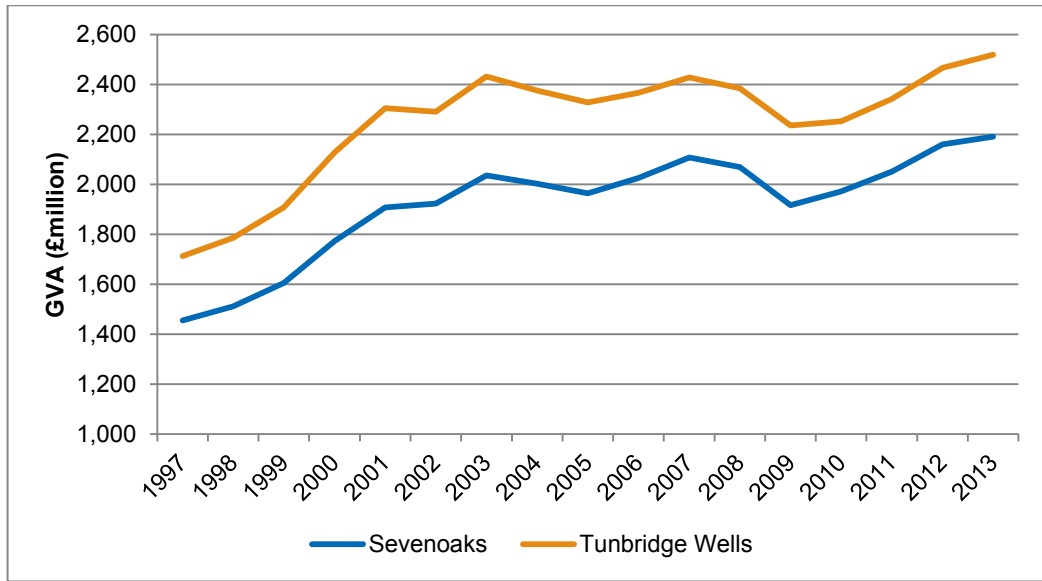
Source: Census 2011

**Gross Value Added (GVA)**

4.27 Gross value added (GVA) is a key measure of productivity in the local economy, and analysis of Experian data<sup>43</sup> shows how this has changed historically in Sevenoaks and Tunbridge Wells. As the following graph shows, there has been a similar growth in GVA in both authority areas, with a considerable increase between 1997 and 2003 before a broad stabilisation.

<sup>43</sup> Experian (December 2015) Local Market Forecasts Quarterly

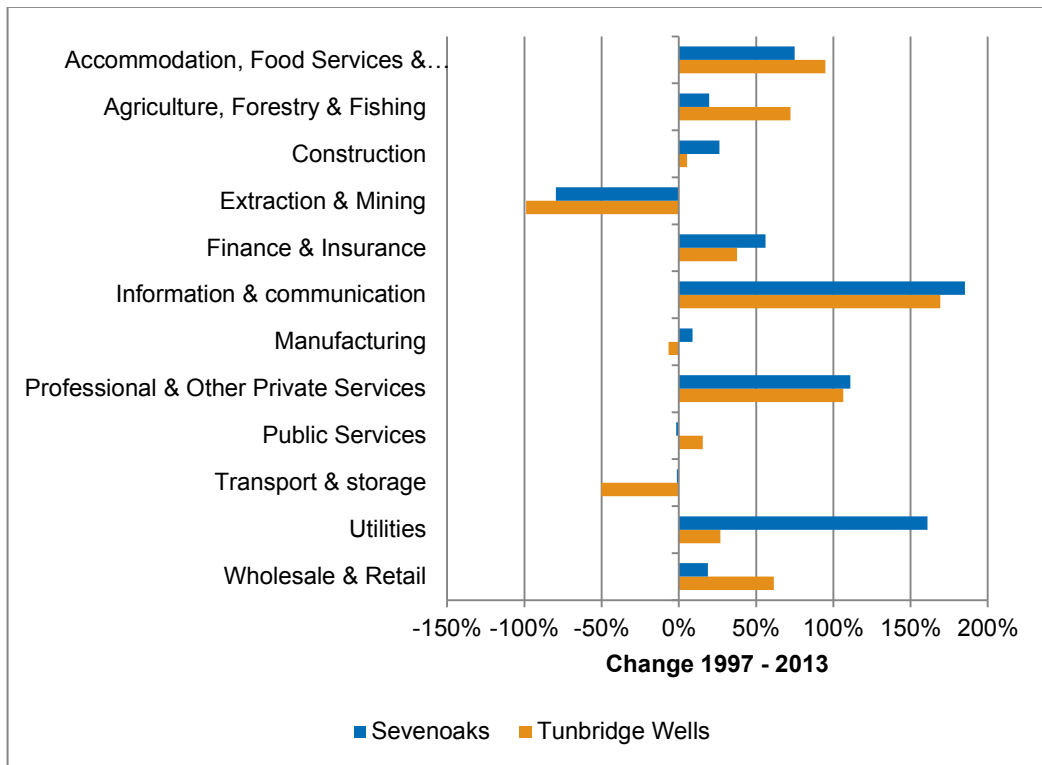
**Figure 4.10: Historic Change in GVA 1997 – 2013**



Source: Experian, 2015

4.28 This can also be broken down by sector, and the following graph shows how the contribution of different sectors has changed over this period.

**Figure 4.11: Historic Change in GVA by Sector 1997 – 2013**



Source: Experian, 2015



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- 4.29 The contribution of the information and communication sector has increased in both Sevenoaks and Tunbridge Wells over the period shown, with a growth in the contribution of both professional and other services and accommodation, food services and recreation. Sevenoaks has also seen a sizeable proportionate growth in the contribution of utilities. Tunbridge Wells has seen a growth in agricultural industries, despite a fall in the number employed in the sector, suggesting an increased productivity amongst the Borough's agricultural enterprises. The extraction and mining sector has declined in both authorities, however, with manufacturing and public services also seeing little growth.
- 4.30 Table 4.7 shows proportionate growth in different sectors in Sevenoaks and Tunbridge Wells. Various periods are presented, covering a period of sustained national economic growth (1998 – 2008), a more recessionary climate (2009 – 2013) and the period as a whole, from 1998 to 2013. It is important to note that the proportionate figures can be sensitive to rapid growth from a small base, which can exaggerate trends in sectors which make a small overall contribution to GVA.

**Table 4.7: Proportionate Change in GVA by Sector**

	Sevenoaks		Tunbridge Wells			
	97 – 08	09 – 13	97 – 13	97 – 08	09 – 13	97 – 13
Accommodation, Food Services & Recreation	82%	6%	75%	99%	8%	95%
Agriculture, Forestry & Fishing	8%	12%	20%	50%	12%	72%
Construction	40%	5%	26%	19%	3%	5%
Extraction & Mining	-65%	-31%	-80%	-72%	-92%	-99%
Finance & Insurance	30%	14%	56%	20%	16%	38%
Information & Communication	168%	18%	185%	166%	14%	169%
Manufacturing	2%	16%	9%	-5%	5%	-7%
Professional & Other Private Services	82%	22%	111%	85%	18%	106%
Public Services	-1%	2%	-2%	18%	1%	16%
Transport & Storage	-1%	11%	-1%	-33%	-13%	-50%
Utilities	114%	36%	161%	36%	11%	27%
Wholesale & Retail	16%	16%	19%	43%	25%	62%
<b>Total GVA</b>	<b>42%</b>	<b>14%</b>	<b>51%</b>	<b>39%</b>	<b>13%</b>	<b>47%</b>

Source: Experian, 2015

- 4.31 It is clear that much of the growth in the information and communication sector occurred prior to the recession, with a similar profile of growth for the professional and other private services sector. During the recession, wholesale and retail saw the greatest increase in contribution in Tunbridge Wells, with the utilities sector driving growth in Sevenoaks.



## Business Base

- 4.32 In order to assess the characteristics of the areas business base, 2015 evidence provided by ONS has been utilised. The 'UK Business: Activity, Size and Location' dataset provides information on the total number of businesses in the whole UK economy in March 2015, broken down by industry and local authority. This provides a measure of businesses which complements the earlier analysis of employees, with different trends emerging if industries are dominated by larger employers, for example.
- 4.33 This shows that in March 2015 there were 6,370 businesses in Sevenoaks and 6,115 businesses in Tunbridge Wells. The professional, scientific and technical industry supports the greatest proportion of businesses within both Sevenoaks (20% - or 1,270 businesses) and Tunbridge Wells (24% - or 1,450 businesses). Within both authorities, the construction industry accounts for the second highest proportion of businesses, equating to 14% in Sevenoaks and 10% in Tunbridge Wells. The industry representing the smallest number of businesses is public administration and defence, with just 25 businesses operating in the industry in Sevenoaks and 20 in Tunbridge Wells.

**Table 4.8: Business Enterprises by Industry 2015**

	Sevenoaks		Tunbridge Wells		Sevenoaks and Tunbridge Wells	West Kent	South East LEP	England
Agriculture, forestry & fishing	200	3%	280	5%	4%	3%	4%	5%
Production	380	6%	255	4%	5%	5%	6%	6%
Construction	895	14%	620	10%	12%	13%	16%	12%
Motor trades	180	3%	135	2%	3%	3%	3%	3%
Wholesale	360	6%	270	4%	5%	5%	4%	4%
Retail	370	6%	445	7%	7%	6%	7%	8%
Transport & Storage (inc. postal)	150	2%	95	2%	2%	2%	4%	3%
Accommodation & food services	255	4%	295	5%	4%	4%	6%	6%
Information & communication	570	9%	565	9%	9%	9%	7%	8%
Finance & insurance	145	2%	135	2%	2%	2%	2%	2%
Property	240	4%	205	3%	4%	3%	3%	4%
Professional, scientific & technical	1,270	20%	1,450	24%	22%	22%	17%	18%
Business administration & support services	600	9%	575	9%	9%	9%	8%	8%
Public administration & defence	25	0%	20	0%	0%	0%	0%	0%
Education	100	2%	130	2%	2%	2%	2%	2%

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Health	210	3%	220	4%	3%	4%	4%	4%
Arts, entertainment, recreation & other services	420	7%	420	7%	7%	6%	6%	7%
<b>Total</b>	<b>6,370</b>	-	<b>6,115</b>	-	-	-	-	-

Source: Activity, Size, Location

### Size profile of the business base

- 4.34 Data on the size profile of the business base in March 2015 is also available through the 'UK Business: Activity, Size and Location' dataset.
- 4.35 The size profile of the Sevenoaks and Tunbridge Wells business base demonstrates a slightly higher representation of micro sized (0 - 9 employees) businesses at 90.3% and 90.1% respectively, when compared to 89.7% across West Kent, 89.4% across the South East LEP and 88.8% on average across England. The number of small businesses (10 - 49 employees) in Sevenoaks and Tunbridge Wells is slightly lower, at 8.2% and 8.3% respectively, than the wider averages ranging from 8.5% to 9.2%. The number of medium and large businesses in Sevenoaks and Tunbridge Wells, at 1.5% and 1.6%, is also lower than the West Kent (1.8%) and South East LEP (1.7%) and national (2.0%) averages. However, whilst only accounting for 1.6% of all businesses, the medium and large businesses in Sevenoaks and Tunbridge Wells make an important contribution to the area in terms of total employment.

**Table 4.9: Businesses by size band 2015**

	Micro (0 – 9)	Small (10 – 49)	Medium (50 – 249)	Large (250+)
Sevenoaks (Total Businesses )	5,750	525	75	20
Sevenoaks (%)	90.3%	8.2%	1.2%	0.3%
Tunbridge Wells (Total Businesses )	5,510	505	85	15
Tunbridge Wells (%)	90.1%	8.3%	1.4%	0.2%
Sevenoaks and Tunbridge Wells	90.2%	8.2%	1.3%	0.3%
West Kent	89.7%	8.5%	1.4%	0.3%
South East LEP	89.4%	8.8%	1.4%	0.3%
England	88.8%	9.2%	1.6%	0.4%

Source: Activity, Size, Location

### Change in the business base

- 4.36 It is also important to understand the historic change in the area's business base. The Business Demography statistical dataset published by ONS provides information on registered active UK enterprises and the births and deaths of enterprises. This dataset replaces the VAT Registrations statistics published by the Department for Business, Innovation and Skills (BIS) and does not provide data comparable to that set out above.

- 4.37 According to Business Demography statistics, in 2014 there were 6,745 active businesses (enterprises) in Sevenoaks and 6,585 in Tunbridge Wells. Over the period from 2004 to 2014, the number of businesses in Sevenoaks increased by 805, demonstrating growth of 13.6%, and the number of businesses in Tunbridge Wells increased by 850, demonstrating growth of 14.8%. This growth is broadly in line with the average for West Kent and the South East LEP, albeit slightly lower than the national average growth of 18.6%. This is summarised in Table 4.10 below.

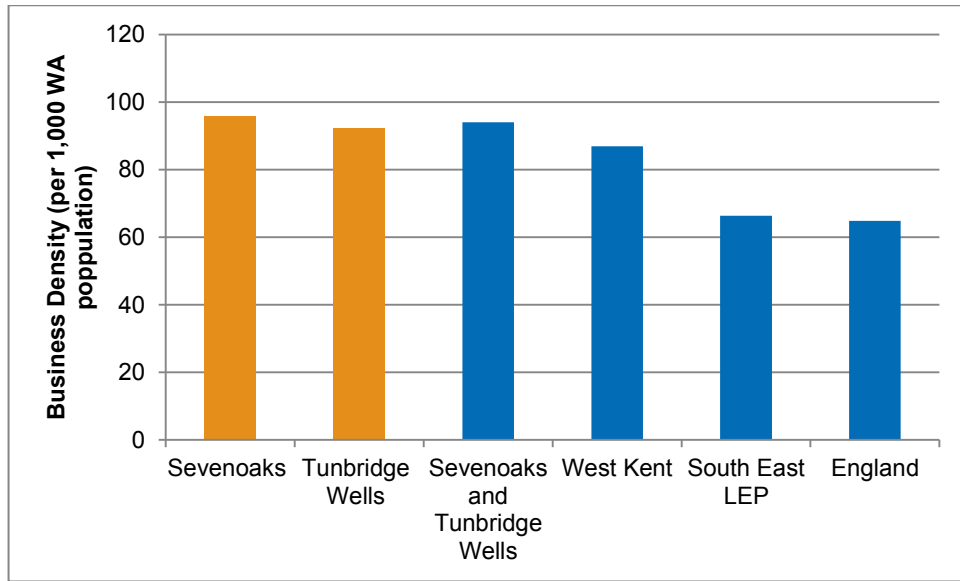
**Table 4.10: Business growth 2004 – 2014**

	2004	2014	Total Change 2004 - 2014	% Change 2004 – 2014
Sevenoaks	5,940	6,745	805	13.6%
Tunbridge Wells	5,735	6,585	850	14.8%
Sevenoaks and Tunbridge Wells	11,675	13,330	1,655	14.2%
West Kent	16,485	18,925	2,440	14.8%
South East LEP	146,460	166,730	20,270	13.8%
England	1,885,265	2,235,345	350,080	18.6%

*Source: Business Demography*

- 4.38 When the size of the business base in Sevenoaks and Tunbridge Wells is compared to the size of the working age population (aged 16 – 64), it shows that the area has a much higher business density, at 96 and 92 businesses per 1,000 working age people, respectively, than the averages across the wider comparator areas. This is presented in the following figure.

**Figure 4.12: Business density 2014**



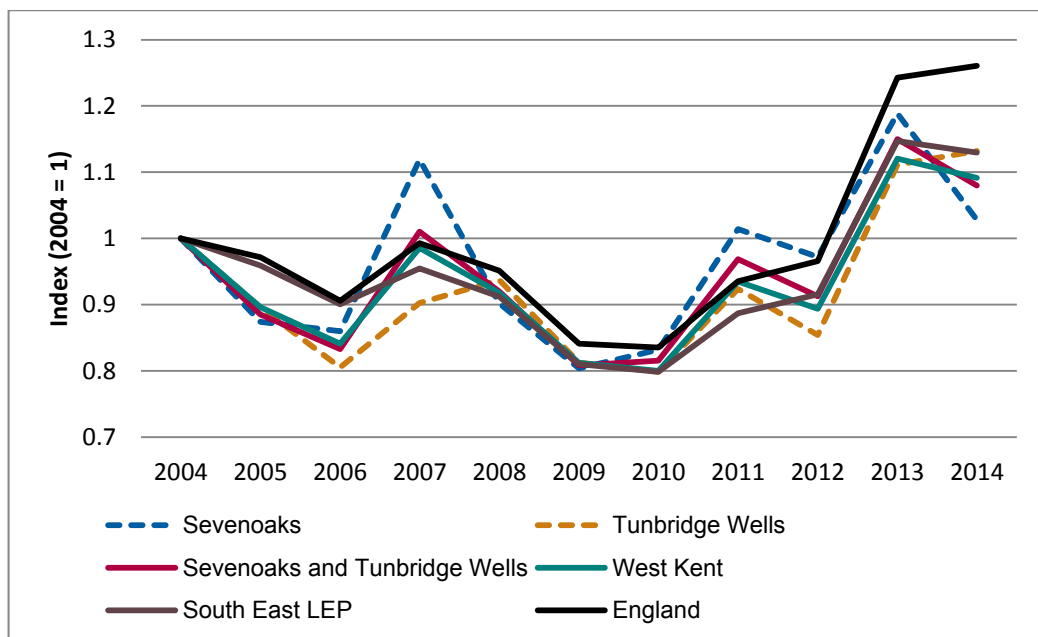
Source: *Business Demography and Mid-Year Population Estimates*

- 4.39 The high business density in Sevenoaks and Tunbridge Wells suggests that there are lower levels of medium and large companies and a higher number of smaller businesses within the area, compared to the wider areas.

**Business Start-Up Rates**

- 4.40 Over the period from 2004 to 2014, the number of business start-ups has fluctuated across all of the comparator areas. Generally, business start-ups declined from 2004 – 2006 before increasing to 2007/2008 and declining again during the recessionary period. From 2012 to 2013 start-up rates in both Sevenoaks and Tunbridge Wells increased by 22.3% and 30.1%, respectively. However, whilst Tunbridge Wells showed marginal increase (1.9%) in business start-ups from 2013 to 2014, start-ups in Sevenoaks declined by 13.5% over the same period.

**Figure 4.13: Indexed Business Start-Ups 2004-2014**



Source: Business Demography

**Business Survival Rates**

4.41 Table 4.11 sets out the 5 year survival rates of businesses that were started up in 2009. This suggests that the survival rates of businesses in years 1 to 5 in both Sevenoaks and Tunbridge Wells were either in line with or higher than the average business survival rates in West Kent, the South East LEP area and England.

**Table 4.11: 2009 Start-Up Business Survival Rates**

	Survival Rate				
	1 Year	2 Year	3 Year	4 Year	5 Year
Sevenoaks	92.2%	79.1%	64.3%	51.3%	44.3%
Tunbridge Wells	93.2%	76.9%	64.1%	53.0%	46.2%
Sevenoaks and Tunbridge Wells	92.7%	78.0%	64.2%	52.2%	45.3%
West Kent	91.7%	76.9%	62.6%	51.3%	44.2%
South East LEP	92.2%	75.6%	60.8%	49.6%	42.0%
England	90.9%	73.9%	59.7%	48.9%	41.8%

Source: Business Demography

**Business Closures**

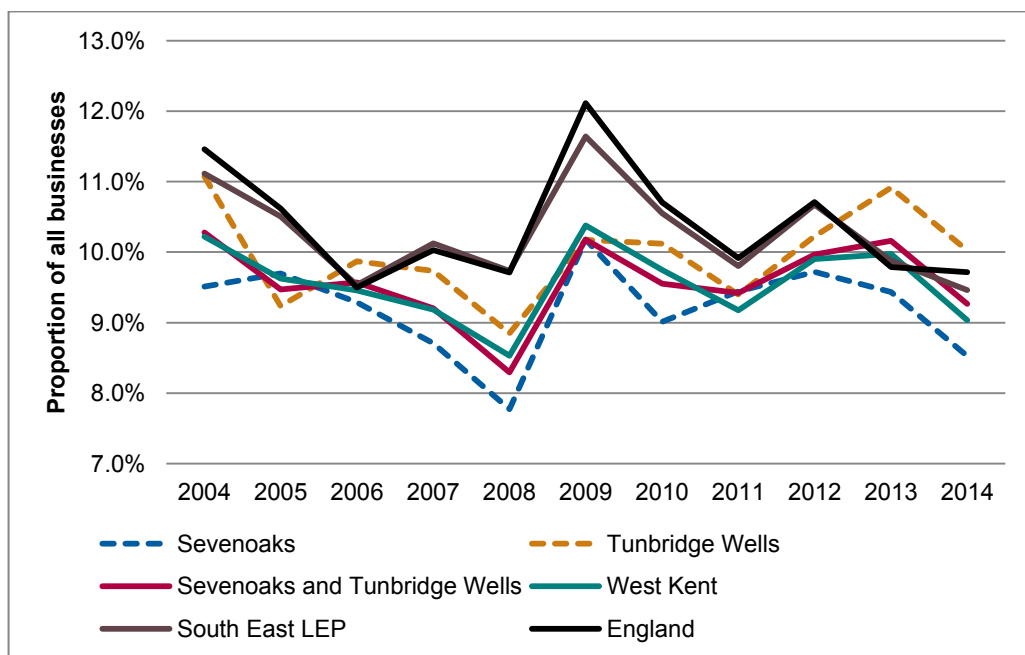
4.42 Business closures data (otherwise known as business deaths) published by ONS identifies businesses no longer active in a given year, having been classified as active in the preceding year. This is based on information held by HM Revenue and Customs and Companies House in relation to VAT and Pay as You Earn. This provides an indication of

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the number of businesses ceasing to operate and contribute to the local economy on an annual basis.

- 4.43 Business closures in Sevenoaks stood at 8.5% of all businesses in 2014, which was lower than the comparator averages which ranged from 9.0% to 9.7%. In comparison Tunbridge Wells had a higher rate of closures at 10.0% of all businesses.
- 4.44 Notwithstanding Tunbridge Wells maintained a strong performance during the recession and until 2012, with closure rates lower than national average. Sevenoaks has also historically maintained business closures at a rate lower than the South East LEP area and the national average.

**Figure 4.14: Business Death Rate 2004 – 2014**



Source: *Business Demography*

### Successful Investments

- 4.45 The analysis above can be contextualised using data shared by Locate in Kent, which records the number of investments successfully facilitated by the organisation and the number of jobs created or saved.
- 4.46 As summarised in Table 4.12, this indicates that a total of 10 investments have been facilitated in Sevenoaks and Tunbridge Wells over the most recent two year period, saving or creating just under 700 jobs. The majority of these jobs were created in 2015/16, with wider West Kent also attracting significant new job creation during this time as a result of investments such as Amazon's new distribution centre in Aylesford in Tonbridge and Malling.

**Table 4.12: Successful Investments in West Kent 2014 – 2016**

	April 2014 – March 2015		April 2015 – March 2016	
	Successes	Jobs	Successes	Jobs
Sevenoaks	2	59	2	310
Tunbridge Wells	1	15	5	312
Sevenoaks and Tunbridge Wells	3	74	7	622
West Kent	4	89	12	1,391

Source: *Locate in Kent*

- 4.47 Data shared by *Locate in Kent* also indicates that there were 86 active projects in West Kent, primarily searching for manufacturing, retail, wholesale and construction premises<sup>44</sup>. More than a third of projects involved relocations from elsewhere in Kent, with almost a quarter looking to expand. This demonstrates the demand for West Kent as a business location, and its importance in ensuring that companies are not lost to other areas. *Locate in Kent* conclude that the level of active projects in West Kent does not reflect all market activity, and reflects the difficulty that many businesses have in securing suitable premises and sites within the area. Those businesses that are committed to West Kent are likely to seek support from them, whilst others who successfully locate or expand within the area do so following their own commercial negotiations.

## Population and labour force

### Population

- 4.48 An assessment of population provides a valuable indicator of the socio-economic vitality of an area, highlighting growth or decline which would impact upon the size of the labour force in Sevenoaks and Tunbridge Wells. Annual mid-year population estimates are published by the ONS, and the following chart shows how the population of Sevenoaks and Tunbridge Wells has changed over the past decade.

**Table 4.13: Population Change 2004 – 2014**

	2004	2014	Change	%
Sevenoaks	110,045	117,811	7,766	7.1%
Tunbridge Wells	105,131	116,105	10,974	10.4%
Sevenoaks and Tunbridge Wells	215,176	233,916	18,740	8.7%
West Kent	325,617	358,342	32,725	10.1%
South East	3,761,026	4,097,289	336,263	8.9%
England	50,194,600	54,316,618	4,122,018	8.2%

Source: ONS

<sup>44</sup> *Locate in Kent* (2016) West Kent Report

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- 4.49 Sevenoaks and Tunbridge Wells are comparable in the size of their respective populations, although it is evident that Tunbridge Wells has seen a stronger level of population growth over the past decade. This has surpassed the growth seen across West Kent, and that recorded in the South East LEP area and England more widely. Conversely, the population of Sevenoaks has grown to a slightly smaller extent.

### Age Structure

- 4.50 Age is an important indicator in determining the socio-economic structure of the population, and particularly the number of residents of working age who can contribute to the labour force and potentially be available for employment.
- 4.51 Table 4.14 summarises the structure of the population of Sevenoaks and Tunbridge Wells, based on 2014 mid-year population estimates.

**Table 4.14: Age Profile 2014**

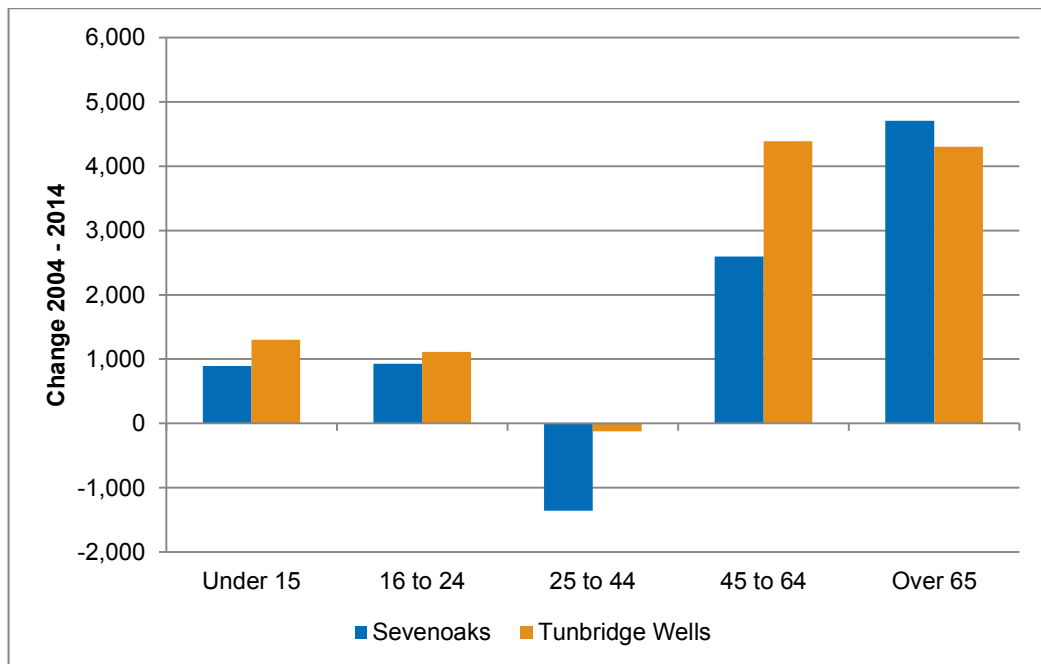
	Under 15	16 to 24	25 to 44	45 to 64	Over 65
Sevenoaks	19.6%	8.9%	23.3%	27.6%	20.5%
Tunbridge Wells	20.2%	9.3%	25.5%	26.6%	18.4%
Sevenoaks and Tunbridge Wells	19.9%	9.1%	24.4%	27.1%	19.5%
West Kent	20.1%	9.5%	24.3%	27.0%	19.1%
South East	18.9%	10.8%	24.2%	26.3%	19.8%
England	19.0%	11.4%	26.7%	25.3%	17.6%

Source: ONS, 2014

- 4.52 Sevenoaks contains a comparatively large proportion of older residents aged 65 and over, surpassing the levels seen nationally. Tunbridge Wells contains a relatively large proportion of children aged 15 and under, reflecting and driving the West Kent trend. Compared to England and the wider South East LEP, however, younger people aged 16 to 24 form a smaller component of the population in both authority areas, supporting the conclusion that the working age population also contains a marginally larger older cohort.
- 4.53 The age profiles have been partially driven by recent trends. As shown in the following graph, over the past decade, both Sevenoaks and Tunbridge Wells have seen sizeable growth in older age groups, with more limited growth in younger age groups. There has been a notable decline in the number of residents aged 25 to 44 in both authorities.



**Figure 4.15: Change in Population by Age Group 2004 – 2014**



Source: ONS

**Economic Activity**

- 4.54 A person is deemed economically active if they are either in employment, or not in employment but seeking work and ready to start within two weeks, or waiting to start a job already obtained. Similarly, economic inactivity can be a measure of the number of residents not in employment, or not actively looking for employment.
- 4.55 Local data on economic activity can be compared to national and regional benchmarks to determine whether there is a high or low rate of activity, highlighting the size of latent labour force either currently employed or available to start work immediately.
- 4.56 The Annual Population Survey (APS) provides an indicator of the number of economically active residents in an area based on responses received during the previous October to September period, and considers the economic activity rate for all residents aged 16 to 64. This is summarised in Table 4.15.

**Table 4.15: Economic Activity (Oct 2014 – Sep 2015)<sup>45</sup>**

	Sevenoaks	Tunbridge Wells	Sevenoaks and Tunbridge Wells	West Kent	South East LEP	England
Economically active residents	54,100	54,500	108,600	172,000	1,948,400	26,618,900
Economic activity rate	75.6%	76.9%	76.3%	79.1%	78.5%	77.8%
Employed residents	51,700	51,400	103,100	165,500	1,846,700	25,164,000
Employment rate	72.3%	72.6%	72.5%	76.1%	74.4%	73.6%
Unemployment rate	4.4%	5.6%	5.1%	–	5.2%	5.5%
% of economically inactive who want a job	23.6%	24.0%	23.7%	25.6%	27.6%	24.2%

Source: ONS, 2015

4.57 The latest APS data suggests that Sevenoaks and Tunbridge Wells have comparable levels of economic activity and employment, which fall below those seen in the wider comparator areas. West Kent as a whole has a high level of economic activity and employment, however, indicating that the population of Tonbridge and Malling contains a greater number of economically active residents.

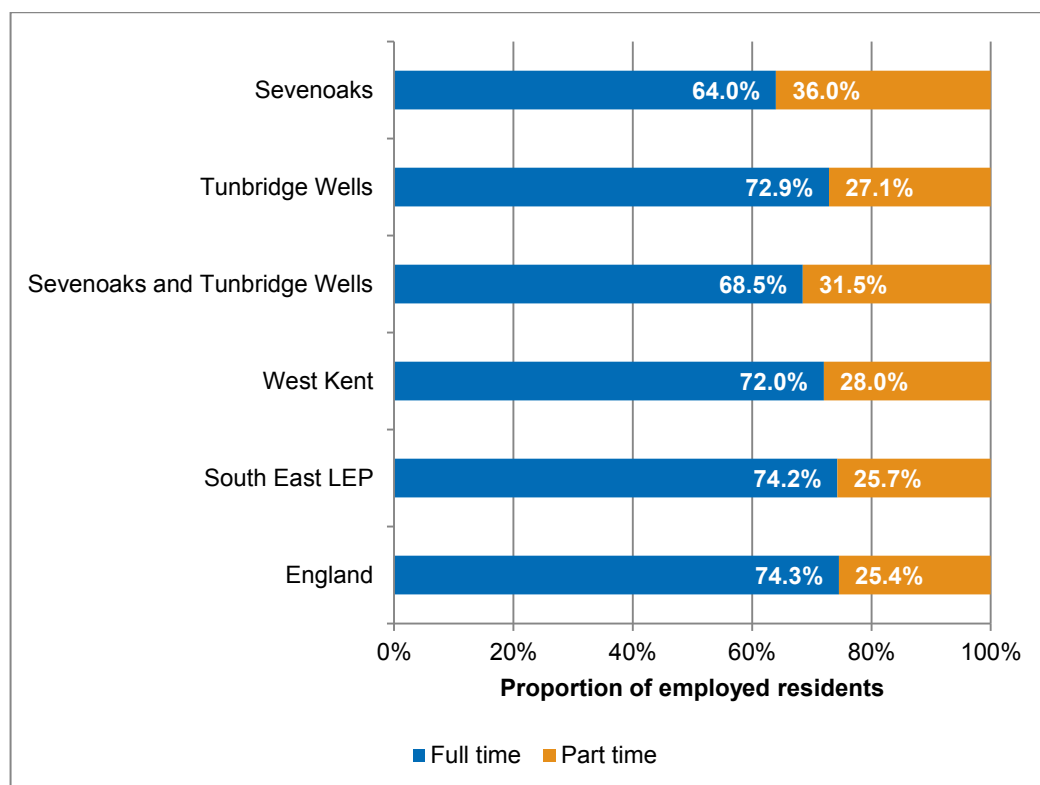
4.58 The APS also shows the proportion of economically inactive residents who want a job, potentially highlighting a sizeable latent labour force in the area. Around 24% of economically inactive residents in Sevenoaks and Tunbridge Wells are seeking work.

**Full time and part time work and self-employment**

4.59 The APS also highlights the proportion of employed residents who work in full time or part time occupations. This is summarised in the following graph, again based on residents aged 16 to 64.

<sup>45</sup> Where data is not provided information is not available.

**Figure 4.16: Full Time and Part Time Employment (Oct 2014 – Sep 2015)**



Source: ONS, 2015

4.60 Sevenoaks contains a comparatively large number of residents working in part-time employment, which notably exceeds the levels seen in the comparator areas presented. Conversely, a larger proportion of Tunbridge Wells residents work in full-time employment, surpassing West Kent but falling short of the South East LEP and England, where almost three quarters of residents work in full-time employment.

4.61 The APS also identifies those aged 16 and over who are self-employed. As shown below, a comparably large proportion of employed residents in Sevenoaks and particularly Tunbridge Wells are self-employed, compared to wider comparator areas.

**Table 4.16: Self-Employment (Oct 2014 – Sep 2015)**

	Self-employed	% of all in employment
Sevenoaks	10,500	19.3%
Tunbridge Wells	11,800	21.8%
West Kent	33,600	19.4%
South East LEP	317,900	16.4%
England	3,951,500	15.1%

Source: ONS, 2015

## Working from Home

- 4.62 The 2011 Census identified 7,846 residents in Sevenoaks and 8,177 residents in Tunbridge Wells who worked mainly at or from home, who were aged 16 or over.
- 4.63 The number of residents working from home increased over the decade to 2011, with the 2001 Census recording 5,948 people in Sevenoaks mainly working from home and 5,808 residents in Tunbridge Wells. This represents an increase of 32% and 41% respectively<sup>46</sup>.
- 4.64 Of those working from home in 2011, it is possible to identify the industry of occupation. Table 4.17 summarises the main industries in which those working mainly from home work. This highlights consistent trends across both authorities, with a large proportion of those working from home working in professional, scientific and technical industries or wholesale and retail trade. Over one in ten of those working from home work in the construction industry, with information and communication a further source of home working.

**Table 4.17: Top 5 Industries of Residents Working from Home 2011**

Sevenoaks		Tunbridge Wells	
Professional, scientific and technical	16.5%	Professional, scientific and technical	16.4%
Construction	12.2%	Wholesale and retail trade	10.5%
Wholesale and retail trade	10.1%	Construction	8.8%
Information and communication	8.4%	Information and communication	8.8%
Other	7.7%	Human health and social work	7.8%

Source: Census 2011

## Qualifications and Skills

- 4.65 Whilst skills requirements differ by business sector and occupational groups, being able to access a pool of suitably qualified and experienced workers is important to both new and existing businesses, including those who are well established within an area and seeking to grow. It is also likely to influence the type of businesses attracted to Sevenoaks and Tunbridge Wells, in addition to the type of employment land that is required.
- 4.66 It is therefore, important to understand the skills profile of the local labour force, which is recorded in the 2011 Census. This identifies the highest level of qualification, standardised as follows:
- **No qualifications;**
  - **Level 1 qualification** – 1+'O' level passes, 1+ CSE/GCSE any grades, NVQ level 1, or Foundation level GNVQ;

<sup>46</sup> 2001 Census figure only records those aged 16 to 74 and in employment, therefore excluding any home-working resident aged 75+

- **Level 2 qualification** – 5+ 'O' level passes, 5+ CSE (grade 1), 5+ GCSEs (grade A – C), School Certificate, 1+ 'A' levels/ 'AS' levels, NVQ level 2, or Intermediate GNVQ;
- **Apprenticeship**;
- **Level 3 qualification** – 2+ 'A' levels, 4+ 'AS' levels, Higher School Certificate, NVQ level 3, or Advanced GNVQ;
- **Level 4/5 qualification** – first degree, higher degree, NVQ levels 4 and 5, HNC, HND, qualified teacher, medical doctor, dentist, nurse, midwife or health visitor; and
- **Other qualification** – vocational/Work-related Qualifications, Qualifications gained outside the UK (Not stated/ level unknown).

4.67 Table 4.18 shows the highest level of qualification of the local labour force, which consists of residents aged 16 and over.

**Table 4.18: Residents' Highest Level of Qualification 2011**

	Sevenoaks	Tunbridge Wells	Sevenoaks and Tunbridge Wells	West Kent	South East LEP	England
No qualifications	19.2%	17.1%	18.1%	18.8%	23.3%	22.5%
Level 1	13.7%	12.4%	13.1%	13.7%	15.4%	13.3%
Level 2	16.4%	16.6%	16.5%	16.9%	17.2%	15.2%
Apprenticeship	3.4%	2.8%	3.1%	3.4%	3.8%	3.6%
Level 3	11.1%	12.1%	11.6%	11.8%	12.0%	12.4%
Level 4/5	32.0%	34.6%	33.3%	31.2%	23.5%	27.4%
Other qualifications	4.1%	4.5%	4.3%	4.2%	4.9%	5.7%

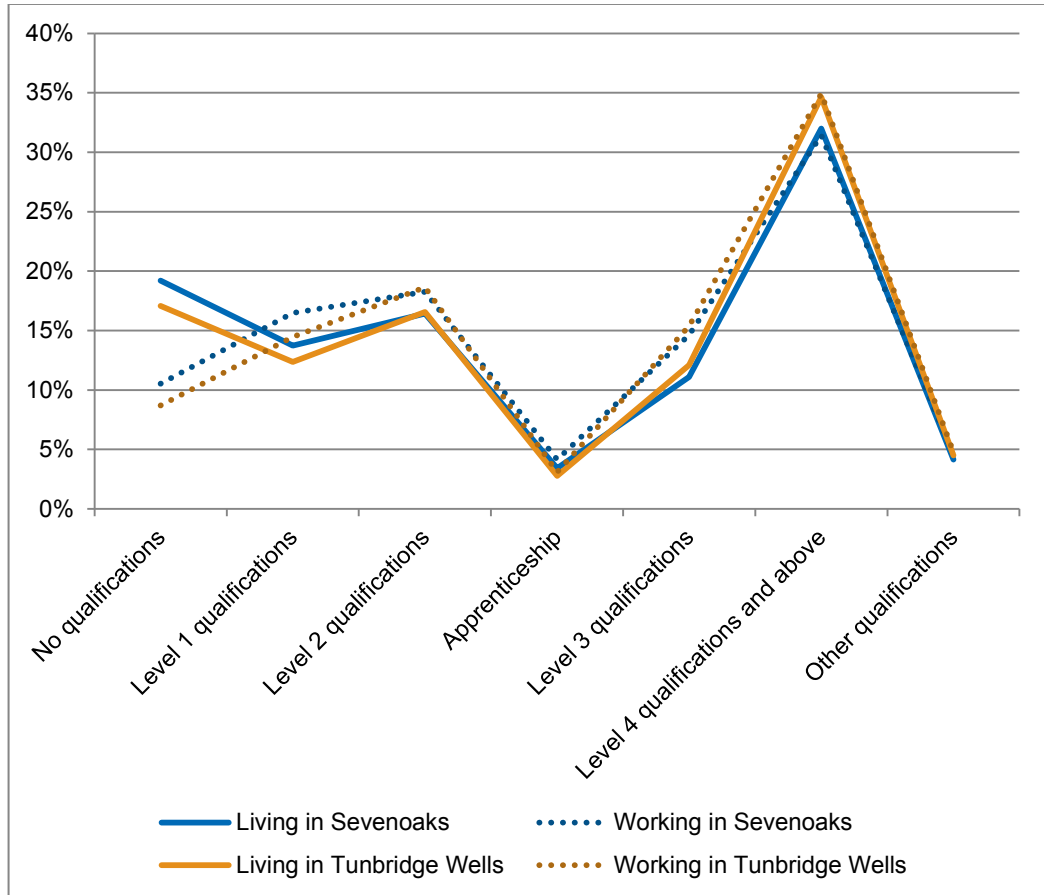
Source: Census 2011

- 4.68 Compared to the South East LEP and England, Sevenoaks and Tunbridge Wells contain fewer residents with no qualifications, with one third of residents across the combined area possessing a degree level qualification or higher (Level 4/5). Comparatively fewer have apprenticeship, level 3 and other qualifications.
- 4.69 Whilst the analysis above focuses on the qualifications of residents, it is also beneficial to consider the qualifications of the workforce, which removes those residents commuting elsewhere to work but adds those commuting to Sevenoaks and Tunbridge Wells. This provides an indication of the skillset of those working in the local economy.

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- 4.70 The following chart illustrates the skills of the labour force (i.e. residents) and workforce (i.e. employed workers) in Sevenoaks and Tunbridge Wells.

**Figure 4.17: Highest Level of Qualification for Residents and Workers 2011**



Source: Census 2011

- 4.71 Whilst there is a broad similarity in profile, there are a number of notable trends. A larger proportion of residents have no qualifications, compared to those with jobs in the area, although it is important to recognise that the former includes all residents whereas the latter captures only those in employment. The workforce contains a greater proportion of people with lower level qualifications. A large proportion of those working in both authorities have a degree level qualification or higher, which aligns with the profile of the labour force.

### Occupations

- 4.72 The occupational profile shows the types of jobs held by residents. This is sourced from the APS for the period from October 2014 to September 2015, with the analysis based upon the nine major groups of the Standard Occupational Classifications (SOC). This is presented in Table 4.19.

**Table 4.19: Residents' Occupation of Employment (Oct 2014 – Sep 2015)**

	Sevenoaks	Tunbridge Wells	Sevenoaks and Tunbridge Wells	West Kent	South East LEP	England
Managers, directors & senior officials	13.7%	12.7%	13.2%	13.1%	11.1%	10.5%
Professional occupations	29.2%	22.2%	25.7%	22.4%	18.4%	19.9%
Associate professional & technical	15.8%	14.3%	15.1%	16.3%	14.1%	14.3%
Administrative & secretarial	6.6%	9.9%	8.3%	9.5%	11.8%	10.7%
Skilled trades	7.5%	4.9%	6.2%	7.7%	11.7%	10.5%
Caring, leisure & other services	6.0%	8.4%	7.2%	8.7%	9.6%	9.1%
Sales & customer services	5.2%	11.8%	8.5%	7.5%	7.4%	7.6%
Process, plant & machine operatives	3.0%	7.9%	5.4%	5.3%	6.2%	6.3%
Elementary occupations	12.2%	8.0%	10.0%	9.3%	9.7%	10.8%

Source: ONS, 2015

- 4.73 A comparatively high proportion of Tunbridge Wells and particularly Sevenoaks residents are working as managers, directors or senior officials, while there is also a clear skew towards professional occupations compared to the wider South East LEP and England. Relatively few residents in Sevenoaks work in administrative or secretarial occupations, with skilled trades, caring, sales and customer services also under-represented amongst residents. In contrast, a relatively large proportion of Tunbridge Wells residents work in sales and customer services, reflecting the role of Royal Tunbridge Wells as a service centre.

### Earnings

- 4.74 Income provides an indication of the strength of the local economy, given their relationship with wider economic factors such as gross value added (GVA) and productivity. Earnings levels also have a relationship with prosperity, and as such the economic wellbeing of residents.
- 4.75 Table 4.20 summarises median gross annual earnings for full-time workers in Sevenoaks and Tunbridge Wells, based on the provisional results of the 2015 Annual Survey of Hours and Earnings (ASHE). Both residence-based and workplace-based earnings are presented, in order to establish variance between the labour force who may work elsewhere, and those working in Sevenoaks and Tunbridge Wells. Neighbouring Tonbridge and Malling, the wider South East LEP and England are also presented, along with London given the strong commuting relationships identified in section 2 of this report.

**Table 4.20: Median Gross Annual Earnings 2015<sup>47</sup>**

	Residence-based earnings	Workplace-based earnings
Sevenoaks	£30,731	£25,220
Tunbridge Wells	£35,331	£27,393
Tonbridge and Malling	£34,996	£28,639
South East LEP	£29,647	£26,611
London	£33,203	£35,333
England	£27,869	£27,872

Source: ONS, 2015

- 4.76 Median earnings for residents of Tunbridge Wells surpass those received in any of the comparator areas presented, with median earnings for residents of Sevenoaks slightly lower but continuing to surpass the median for the wider South East LEP area. Importantly, there is a clear disparity between residence-based and workplace-based earnings in both Sevenoaks and Tunbridge Wells, indicating that many residents commute elsewhere for higher paid employment.

### Key messages

- 4.77 To summarise:
- **A diverse business base** - In 2014 the key business sectors in Sevenoaks and Tunbridge Wells included distribution, hotels and restaurants, banking, finance and insurance, public administration, education and health sectors, these accommodating 69.6% of employees in Sevenoaks and 81.9% of employees in Tunbridge Wells. Both authorities also have a higher than average proportion of micro businesses, employing 9 or less people.
  - **Employment growth sectors include finance and insurance, agriculture and property** - Recent evidence from BRES covering the period from 2009–2014 suggests that Tunbridge Wells has experienced higher levels of employment growth, equivalent to 2,120 employees on average per annum, compared to 640 in Sevenoaks. Over this period, change was apparent in a number of sectors across the two authorities including growth within the finance and insurance, agriculture and property sectors.
  - **GVA growth is derived from growing commercial sectors** - Over the period from 1997 to 2013, there has been a similar growth in GVA in both authority areas, although productivity in Tunbridge Wells has historically remained higher than in Sevenoaks. A substantial proportion of GVA growth is derived from the information and communication sector in both Sevenoaks and Tunbridge Wells, with a growth

<sup>47</sup> Available data cannot be aggregated to provide figures for combined Sevenoaks and Tunbridge Wells area or West Kent



in the contribution of both professional and other services and accommodation, as well as food services and recreation.

- **A location that attracts professional, scientific and technical businesses** - In March 2015 there were 6,370 businesses in Sevenoaks and 6,115 businesses in Tunbridge Wells. In both authorities, the professional, scientific and technical industries are prevalent within the business base. Growth in the number of businesses over recent years is broadly in line with the average growth across West Kent and the South East LEP.
- **A strong location in which to start a small business** - In 2013 and 2014 business start-ups in Tunbridge Wells showed positive signs of growth. Although Sevenoaks demonstrated business start-up growth in 2013, there is evidence of decline from 2013 to 2014. Survival rates of start-up businesses in both authorities are either in line with or higher than the averages seen more widely within West Kent, the South East LEP area and England. Business closures in 2014 as a proportion of all active businesses in Sevenoaks were low at 8.5%, compared to the South East LEP average of 9.5%. Tunbridge Wells saw a slightly higher rate of closures at 10.0% reflecting the higher number of start ups.
- **A growing population but ageing workforce** - The population of Tunbridge Wells has grown at a faster rate than the wider areas over the past 10 years, whilst Sevenoaks has growth at a slightly slower rate. In both authorities, the greatest increase in residents was seen in residents aged 45 and over, with residents aged 25 to 44 declining. As a result, the proportion of economically active and employed residents in the two authorities is lower than the wider area averages.
- **A high level of self-employment** - Across the two authorities a higher than average proportion of employed residents work part time, particularly in Sevenoaks, and a higher proportion of people in employment are self-employed, particularly in Tunbridge Wells.
- **A highly skilled population but skills gaps remain** - Relative to the average for the South East LEP and England, Sevenoaks and Tunbridge Wells contain a low proportion of residents with no qualifications and a high proportion with qualifications equivalent to Level 4 and above. Compared to residents of Sevenoaks and Tunbridge Wells, fewer employed workers in the two authorities have no qualifications, yet the workforce contains a greater proportion of people with lower level qualifications (Level 1 and 2). This is reflected in the annual earnings of residents and employees of the two authorities, with residents in Sevenoaks and Tunbridge Wells on average earning a higher wage in comparison to those who are employed with the authority areas but live elsewhere.

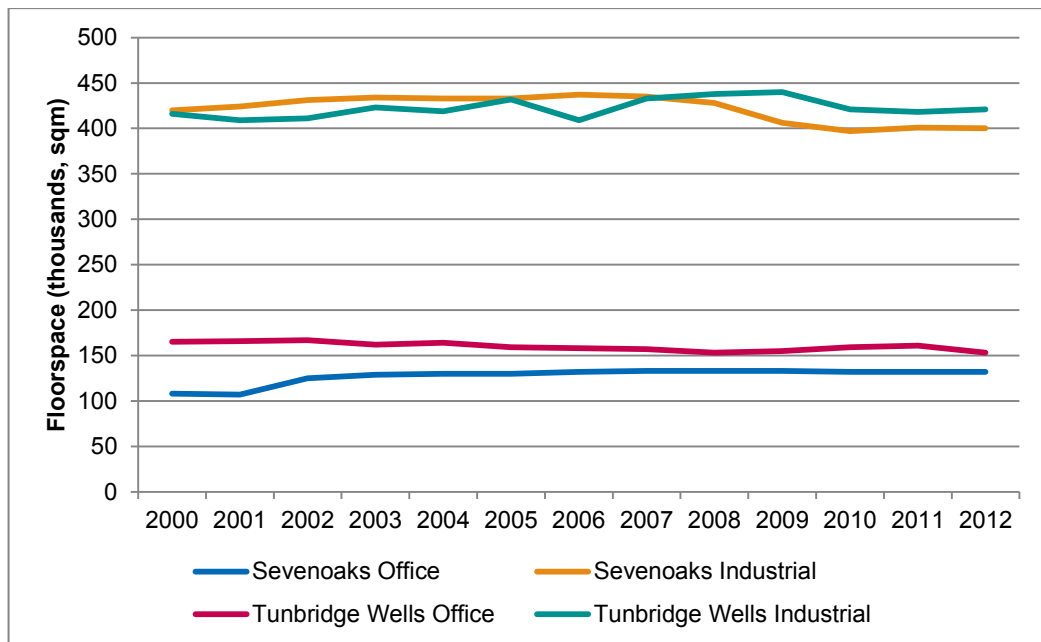
## 5. The Existing Stock of Employment Floorspace

5.1 This section considers the current composition and changes in the existing stock of employment floorspace across the study area, in addition to past development rates drawing on Council monitoring data.

### Rateable properties

5.2 Statistics are published by the Valuation Office Agency<sup>48</sup> (VOA) which can be used to understand how the amount of business floorspace in Sevenoaks and Tunbridge Wells has changed, based on analysis of properties liable for business rates. The latest statistics were published in March 2012, and are shown in the following graph.

**Figure 5.1: Office and Industrial Floorspace 2000 – 2012**



Source: VOA, 2012

5.3 Industrial premises occupy the greatest amount of floorspace in both Sevenoaks and Tunbridge Wells, reflecting the larger size requirements of industrial occupiers. The amount of industrial floorspace in Sevenoaks has, however, fallen over the period shown, with a reduction in floorspace of approximately 20,000 sq m. The amount of office space in Tunbridge Wells has also fallen by approximately 12,000 sq m, with a moderate increase of 5,000 sq m in industrial premises in the Borough. Sevenoaks has, however, seen the amount of office floorspace increase by approximately 24,000 sq m, or 22%.

<sup>48</sup> VOA (2012) Business Floorspace (Experimental Statistics)

5.4 This analysis can be brought up to date through a review of business premises as of February 2016, based on CoStar data. Table 5.1 shows the number of properties identified in Sevenoaks and Tunbridge Wells, alongside an indicative average size for each employment type. This demonstrates that industrial and warehouse occupiers have greater floorspace requirements, with office users typically occupying around 600 sq m in each authority.

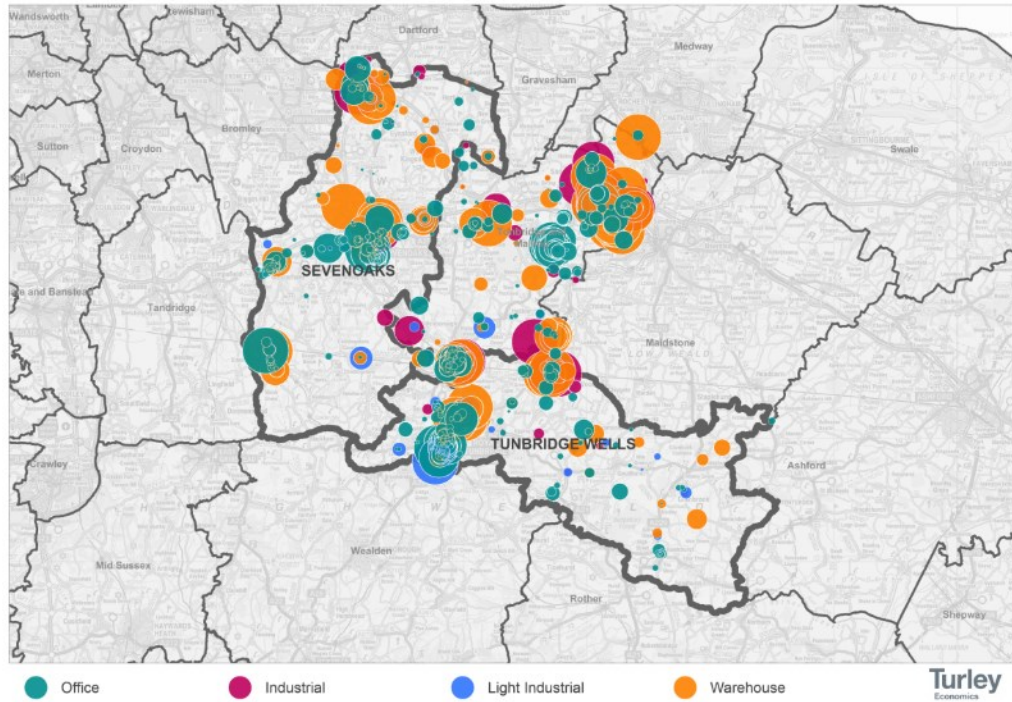
**Table 5.1: Business Premises by Type and Size – February 2016**

	Sevenoaks		Tunbridge Wells	
	Number of properties	Average floorspace (sq m)	Number of properties	Average floorspace (sq m)
Office	206	606	257	592
Industrial	24	2,094	33	1,889
Light industrial	27	735	29	1,039
Warehouse	103	1,769	77	2,235
<b>Total</b>	<b>360</b>	<b>1,048</b>	<b>396</b>	<b>1,053</b>

Source: CoStar, 2016

5.5 Business premises in Sevenoaks, Tunbridge Wells and neighbouring Tonbridge and Malling are presented in the following plan – again broken down by type – in order to profile the existing supply across West Kent. This is aggregated by postcode to highlight the areas in which the greatest supply of business space exists.

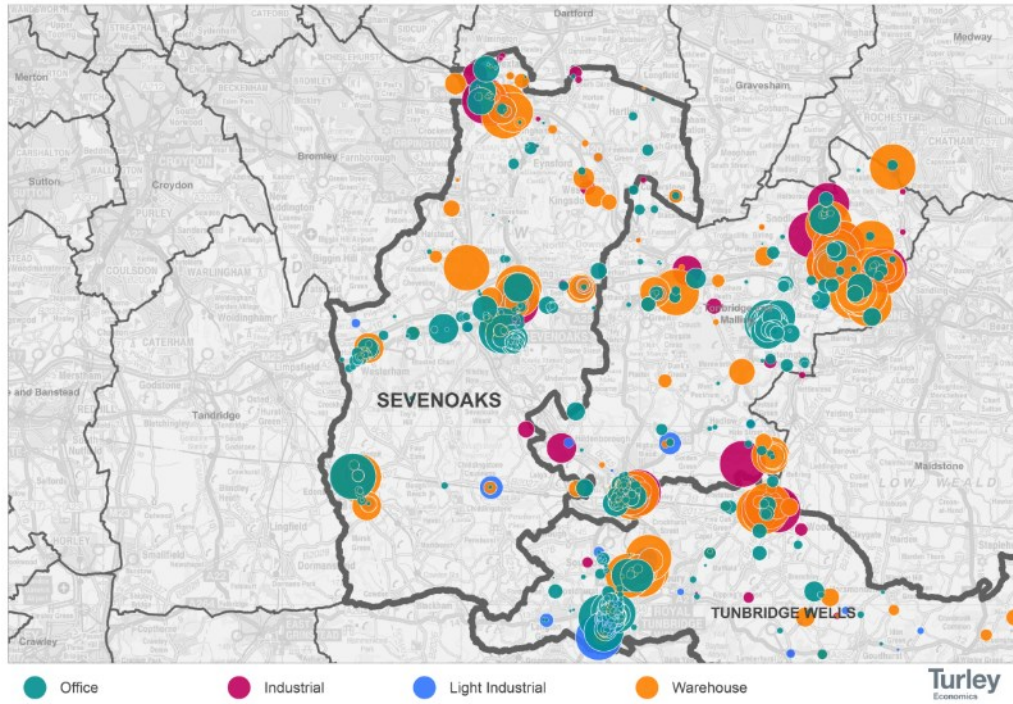
**Figure 5.2: Business Premises in West Kent – February 2016**



Source: CoStar, 2016; Turley, 2016

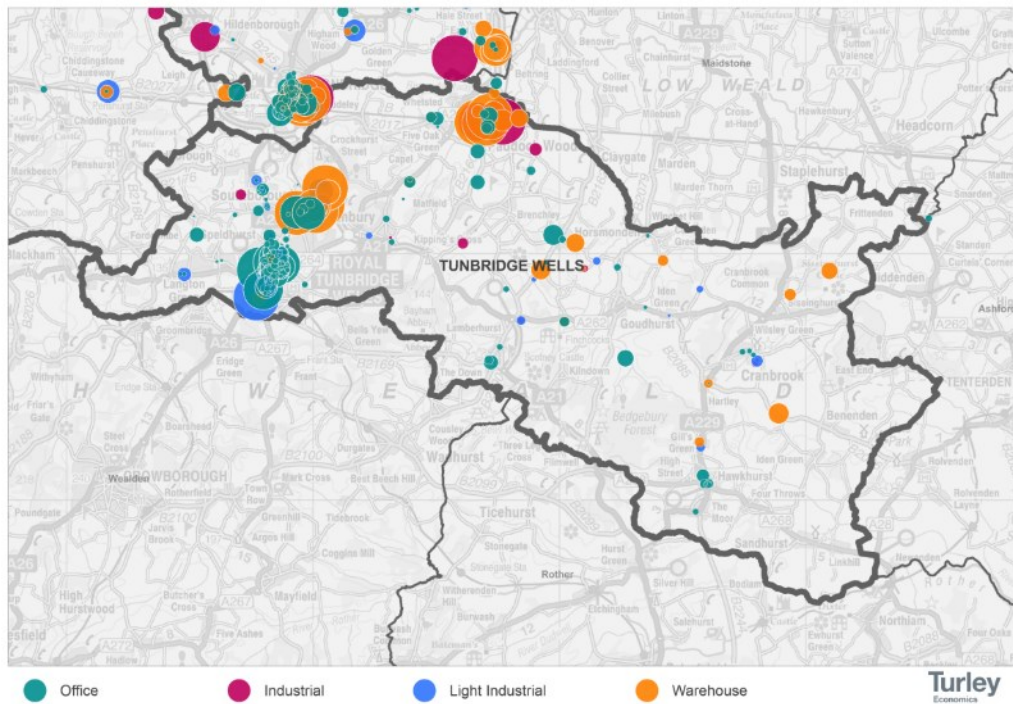
- 5.6 There are concentrations of employment premises in Sevenoaks town and Royal Tunbridge Wells, with a range of types including office space. There are also concentrations in Swanley and Paddock Wood, with a distribution of smaller employment premises across more rural areas of both authorities. It is also notable that there is a concentration of employment space in Tonbridge, close to the local authority boundary. At the scale of the wider FEMA, concentrations of floorspace are also evident elsewhere in Tonbridge and Malling, including to the north of the Borough around Aylesford and the M20 corridor.
- 5.7 Separate plans for each authority are presented below.

Figure 5.3: Business Premises in Sevenoaks – February 2016



Source: CoStar, 2016; Turley, 2016

Figure 5.4: Business Premises in Tunbridge Wells – February 2016



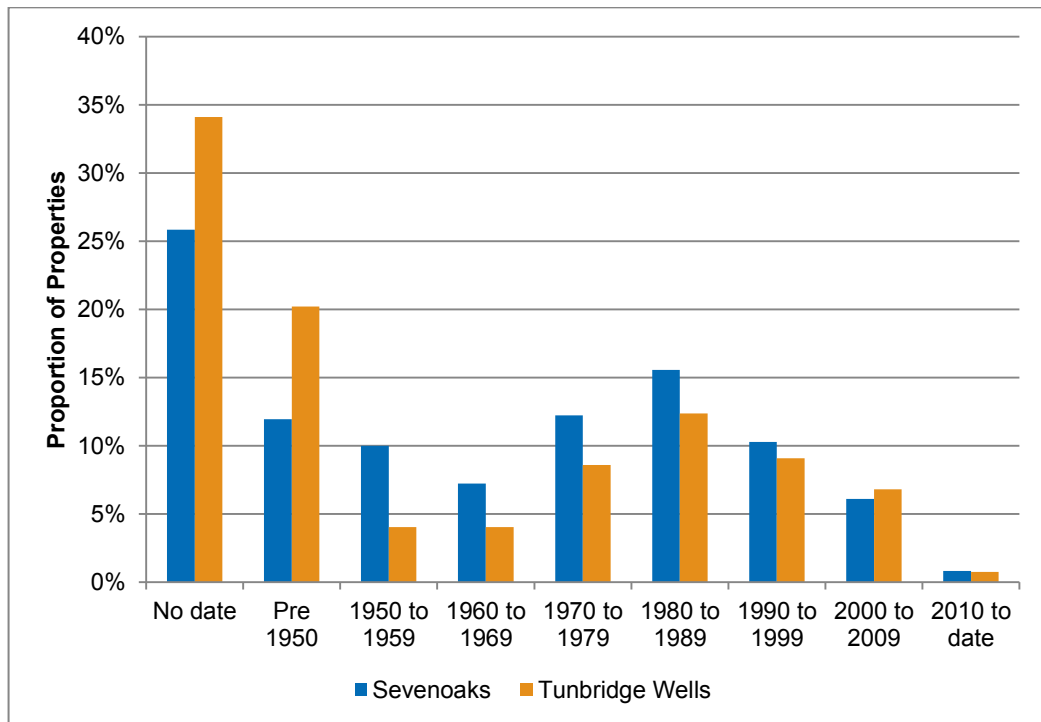
Source: CoStar, 2016; Turley, 2016



**Age of Premises**

5.8 The age of commercial premises can also be established using CoStar, as summarised in the following graph. While age is not recorded for some properties, this suggests that Tunbridge Wells has a comparatively large number of commercial properties built before 1950. Premises in Sevenoaks are broadly newer.

**Figure 5.5: Proportion of Stock by Age**



Source: CoStar, 2016

**Past development rates**

5.9 The remainder of this section considers past development rates drawing on Sevenoaks District and Tunbridge Wells Borough Council monitoring data.

**Completions**

5.10 Monitoring undertaken by both Councils allows an understanding of recent completions and losses of B Use Class employment floorspace since 2008/09. As shown in Table 5.2 a total of 85,632 sq m of floorspace was completed over the 7 year period to 2014/15, of which the majority - 62,619 sq m or 73% - was completed in Tunbridge Wells. A total of 23,013 sq m was completed in Sevenoaks over the same period.

**Table 5.2: Completed Floorspace (sq m) – Gross Gains**

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total
Sevenoaks	4,455	3,280	2,609	4,670	1,646	2,158	4,195	23,013
Tunbridge Wells	5,881	18,871	5,016	23,157	2,638	1,620	5,436	62,619
<b>Total</b>	<b>10,336</b>	<b>22,151</b>	<b>7,625</b>	<b>27,827</b>	<b>4,284</b>	<b>3,778</b>	<b>9,631</b>	<b>85,632</b>

*Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council*

- 5.11 In overall terms, the highest rate of completions took place in 2009/10 and 2011/12 when 22,151 sq m and 27,827 sqm of floorspace was completed. The majority of this development took place in Tunbridge Wells with the completion of 22,151 sq m and 27,827 sqm during these monitoring years. However, the table shows varying levels of completions in both areas; in Sevenoaks ranging from a high of 4,670 sq m in 2011/12 to a low of 1,646 sqm in 2012/13. Tunbridge Wells recorded its lowest rate completion over the period in 2013/14 when just 1,620 sq m was completed.
- 5.12 Table 5.3 disaggregates these completions by use class. At 33,820 sq m, B8 completions account for the largest share of completed floorspace since 2008/09. This is to be expected given the larger floor plates typically required for warehousing and storage, however it is notable that those developments that have come forward have been relatively modest in scale - this perhaps a reflection of the scale of the logistics market in Sevenoaks and Tunbridge Wells, but also a dearth of sites that are suitably located and capable of accommodating premises with floorplates.
- 5.13 A total of 14,252 sq m of completed floorspace, or 16.6%, was associated with the completion of B1a floorspace, with a further 14,800 sq m attributable to B1c or mixed B1 completions. Combined B1 accounts for around 35% of all floorspace completed since 2008/09, although it is evident that the overall quantum of new B1, and particularly B1a, floorspace coming forward has reduced in recent years.
- 5.14 In contrast the overall rate of B2 floorspace completions has fluctuated, peaking in 2011/12 with the completion of 6,700 sq m of floorspace and again in 2014/15 with the completion of 4,169 sq m of floorspace.

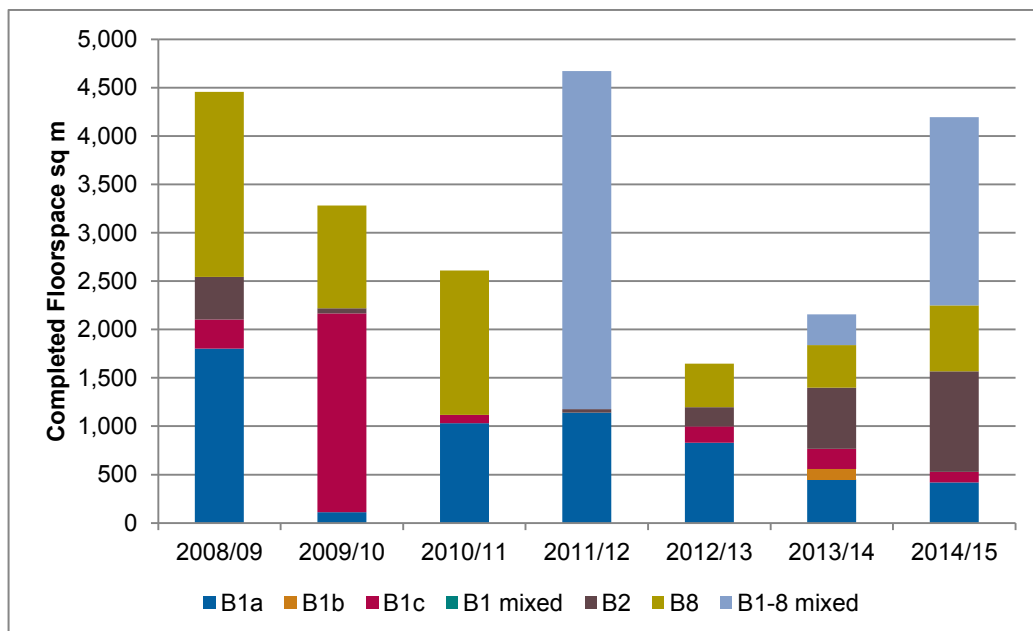
**Table 5.3: Completed Floorspace (sq m) Gross Gains by Use Class – Sevenoaks and Tunbridge Wells**

Use	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total
B1a	3,269	4,236	1,784	1,854	1,081	1,036	992	<b>14,252</b>
B1b	0	0	0	413	0	106	0	<b>519</b>
B1c	2,957	2,496	266	26	820	227	341	<b>7,133</b>
B1 mixed	534	430	0	5,835	235	0	660	<b>7,694</b>
B2	919	1,028	1,271	6,701	1,125	1,097	4,169	<b>16,310</b>
B8	2,657	13,961	4,159	9,506	1,023	992	1,522	<b>33,820</b>
B1-8 mixed	0	0	145	3,492	0	320	1,947	<b>5,904</b>
<b>Total</b>	<b>10,336</b>	<b>22,151</b>	<b>7,625</b>	<b>27,827</b>	<b>4,284</b>	<b>3,778</b>	<b>9,631</b>	<b>85,632</b>

Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council

5.15 The following charts present a more detailed analysis by area and use class. The profile of completed floorspace in Sevenoaks has also changed over this period, with an increase in B2, B8 and mixed B1-8 developments in recent years. In contrast, the quantum of B1a office floorspace completed has declined with just 420 sq m completed in 2014/15.

**Figure 5.6: Completed Floorspace (sq m) Gross Gains - Sevenoaks**



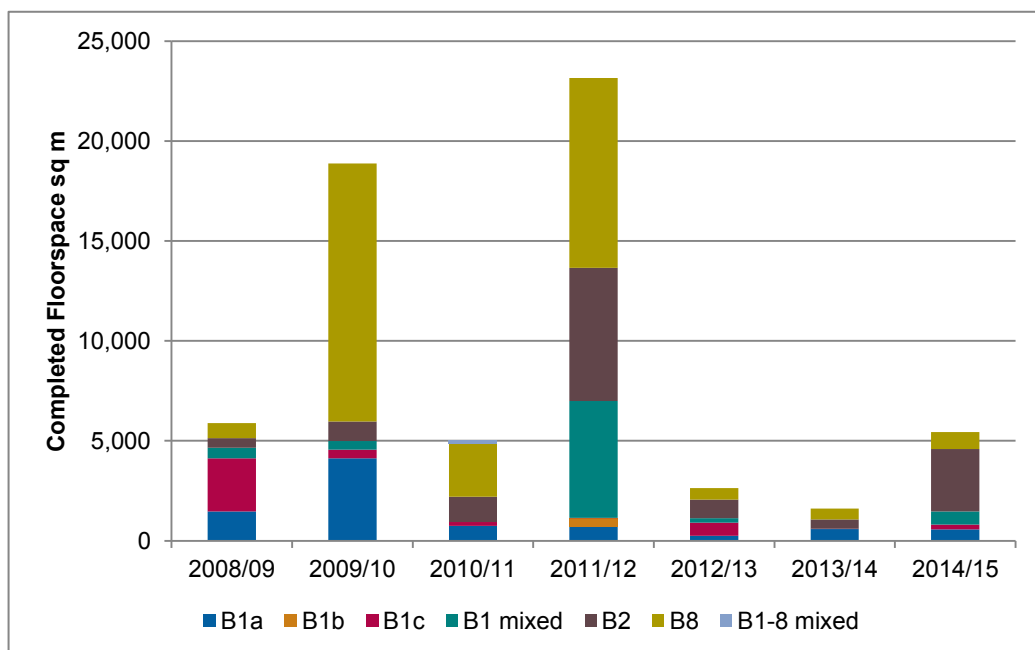
Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council



5.16 The chart below presents the same analysis for Tunbridge Wells and highlights the large quantum of B8 floorspace completed in 2009/10 and 2011/12. Further interrogation of the Council’s monitoring data reveals, however, that 17,934 sq m of this floorspace relates to change of use or the redevelopment of existing floorspace on two existing employment sites. The associated planning applications are:

- Application Ref: 07/02777 which was associated with the development of 12,099 sq m of B8 floorspace in 2009/10 following a fire at the Transfesa Industrial Estate; and
- Application Ref: 10/00265 which was associated with the reclassification of 5,835 sq m of existing employment floorspace for B8 use.

**Figure 5.7: Completed Floorspace (sq m) Gross Gains – Tunbridge Wells**



Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council

5.17 Although completion rates dropped significantly during 2012/13 and 2013/14, the area witnessed an increase in the last monitoring year; driven largely by the completion of 3,132 sq m of B2 floorspace. Again, however, the quantum of new B1a floorspace completed has been minimal.

**Losses**

5.18 It is also important to consider pressure on existing floorspace and the amount of employment floorspace being lost to alternative uses. This is illustrated in Table 5.4 and shows over the period from 2008/09 the area has collectively lost 133,324 sq m of employment floorspace. The largest reported losses were in 2014/15 when 34,101 sq m was lost, followed by 2008/09 with a loss of 31,236 sq m.

**Table 5.4: Completed Floorspace (sq m) Gross Losses**

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total
Sevenoaks	3,120	1,828	4,120	1,515	3,379	6,573	25,685	46,220
Tunbridge Wells	28,116	6,221	6,213	22,766	5,154	10,218	8,416	87,104
<b>Total</b>	<b>31,236</b>	<b>8,049</b>	<b>10,333</b>	<b>24,281</b>	<b>8,533</b>	<b>16,791</b>	<b>34,101</b>	<b>133,324</b>

*Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council*

- 5.19 The net effect of these losses is shown in the Table 5.5 and Figure 5.8 below and shows that over the 7 year period from 2008/09 the area witnessed a net loss of 47,692 sq m of B Use Class employment floorspace.
- 5.20 The rate of loss slowed during the recessionary period from 2009 to 2012, reflecting the downturn in the housing market over the same period, but has risen sharply in recent years from just over 4,200 sq m in 2012/13 to 24,470 sq m in 2014/15.

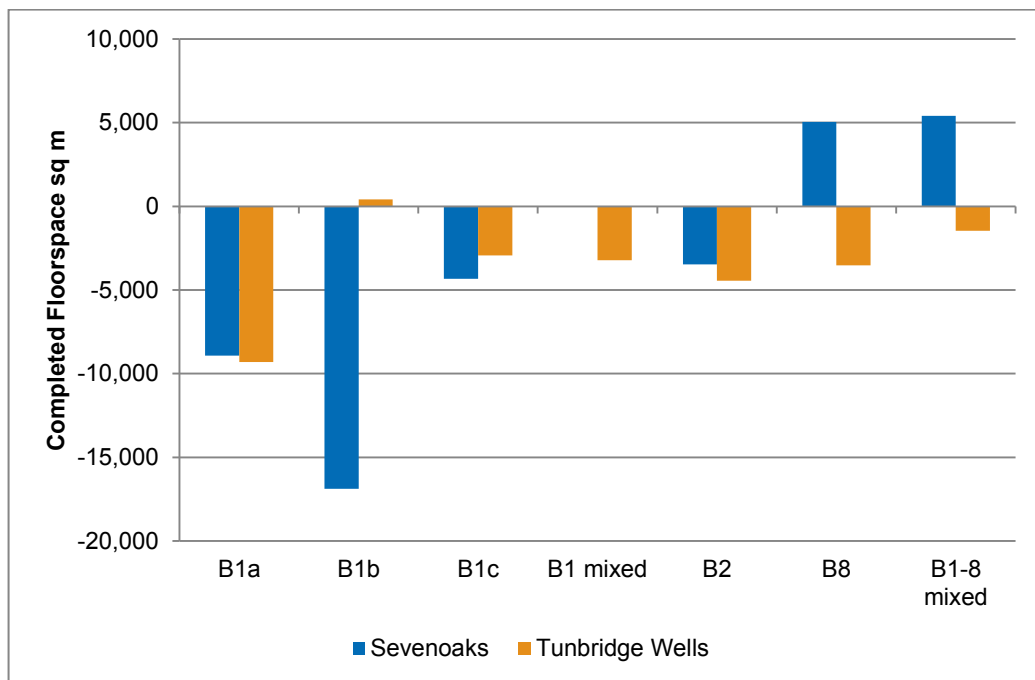
**Table 5.5: Completed Floorspace (sq m) Net – Sevenoaks and Tunbridge Wells**

	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	Total
B1a	1,492	1,969	-2,227	-1,260	-1,503	-6,113	-10,586	<b>-18,228</b>
B1b	-375	0	0	413	0	106	-16,610	<b>-16,466</b>
B1c	1,448	1,656	-3,266	-714	-1,837	-3,020	-1,528	<b>-7,261</b>
B1 mixed	534	330	0	-3,177	-1,574	0	660	<b>-3,227</b>
B2	-3,906	-2,086	-916	-3,294	1,125	-2,733	3,884	<b>-7,926</b>
B8	-20,093	12,233	3,979	8,556	614	-1,573	-2,237	<b>1,479</b>
B1-8 mixed	0	0	-278	3,022	-1,074	320	1,947	<b>3,937</b>
<b>Total</b>	<b>-20,900</b>	<b>14,102</b>	<b>-2,708</b>	<b>3,546</b>	<b>-4,249</b>	<b>-13,013</b>	<b>-24,470</b>	<b>-47,692</b>

*Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council*

- 5.21 As shown in Figure 5.8, recent trends are being driven by large losses of B1 floorspace, although across Tunbridge Wells losses are evident in other market sectors. In contrast Sevenoaks has experienced some gains in B8 and mixed B1-8 floorspace.

**Figure 5.8: Net Change in Completed Floorspace (sq m) by Use 2008/09 to 2014/15**



Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council

- 5.22 The strong housing market and high residential property values make both Sevenoaks and Tunbridge Wells attractive locations for residential development, and in turn, places increased pressure on the supply of lower value employment land. The impact of this is being exacerbated through Permitted Development Rights for the conversion of office to residential which is having a profound effect on the overall supply of secondary B1a office floorspace across the area.
- 5.23 Since 2013, monitoring data provided by the authorities indicates that Sevenoaks has received 20 prior approval applications for the conversion of office to residential uses up to March 2015. A total of four schemes have been completed, with a further four under construction. The remaining schemes have yet to commence on site. In terms of overall scale, the following schemes in Sevenoaks are of particular note:
- Horizon House, Swanley – conversion of office to create 56 residential dwellings. The scheme is under construction and will result in the loss of 3,998 sq m of B1a floorspace in Sevenoaks
  - Tubs Hill House, Sevenoaks – conversion of office to create 74 residential dwellings. The scheme has not yet started but will result in the loss of 9,530 sq m of B1a floorspace in Sevenoaks.
- 5.24 A total of 37 notices have also been received in Tunbridge Wells. Three schemes were reported completed as of 31 March 2015. These were at Park Lodge, Tudeley; The Barn,

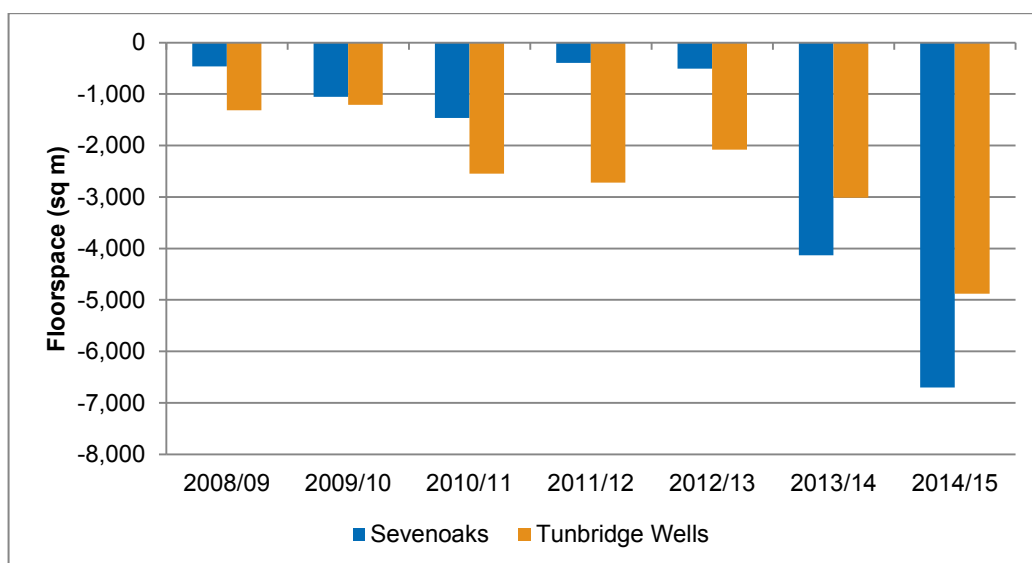
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Shear Farm, Cranbrook; and at Jaeger House, Royal Tunbridge Wells. A further five were under construction. Large office to residential conversions in the Borough include:

- Union House, Royal Tunbridge Wells – This scheme has not yet started but will result in the loss of 6,500 sq m of B1a floorspace.
- Calverley House, Royal Tunbridge Wells – This scheme has not yet started but will result in the conversion of the existing office to create 51 residential dwellings.
- Merevale House, Royal Tunbridge Wells – This scheme has not yet started but will result in the loss of 1,580 sq m of B1a floorspace.
- Wellington Gate, 7 - 9 Church Road, Royal Tunbridge Wells – This scheme has not yet started but will result in the conversion of the existing office to create 32 residential dwellings.

5.25 The increased rate of loss of B1a floorspace is evidenced in Figure 5.9 below which shows the change in the quantum of floorspace lost over the period from 2008/09 to 2014/15.

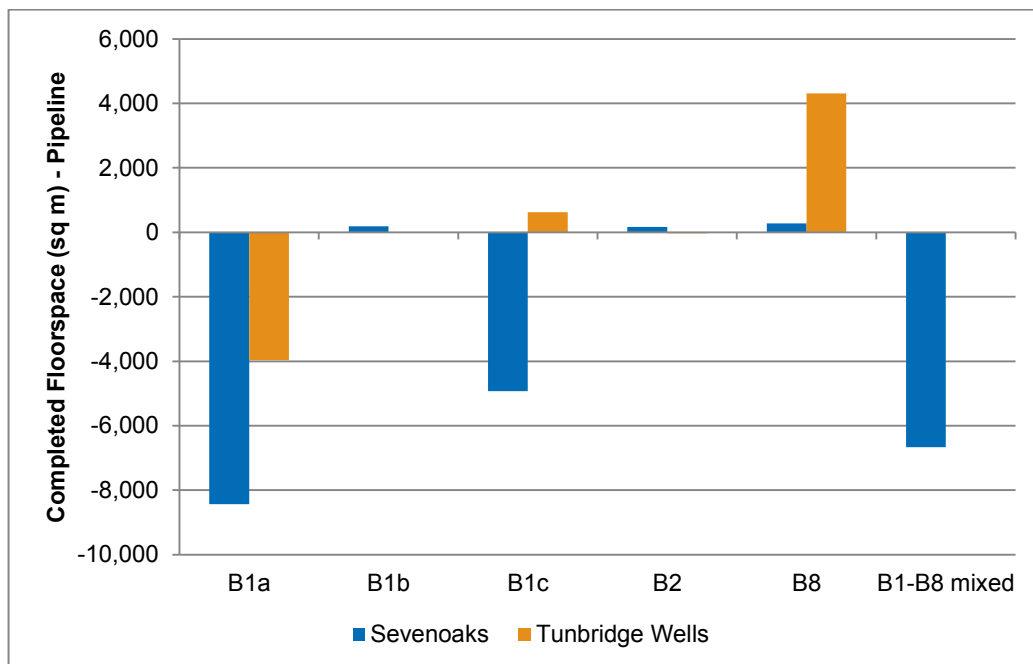
**Figure 5.9: Loss of B1a Floorspace (sq m) 2008/09 to 2014/15**



Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council

5.26 Analysis of pipeline schemes either under construction or not started reveals that this trend is set to continue for the foreseeable future. Sevenoaks is forecast to lose a further 16,724 sq m of B1a employment floorspace, against an overall gain of 8,288 sq m resulting in a net loss of just over 8,000 sq m of floorspace. Sevenoaks is also expected to witness further net losses of B1c floorspace and mixed B1-B8 floorspace.

**Figure 5.10: Net Change in Floorspace (sq m) by Use – Pipeline schemes under construction or not started**



Source: Sevenoaks District Council, Tunbridge Wells Borough Council and Kent County Council

5.27 Tunbridge Wells is also expected to see a net loss of approximately 4,000 sq m of B1a floorspace with the expected gain of 10,568 sq m being offset by a loss of some 14,529 sq m. There is, however, evidence of a modest net gain in B1c floorspace and a gain of 4,306 sq m of B8 floorspace.

5.28 The pipeline suggests that there are unlikely to be significant gains or losses of B1b and B2 floorspace across either area.

**Key messages**

5.29 To summarise:

- In terms of the overall stock of employment floorspace, industrial premises occupy the greatest amount of floorspace in both Sevenoaks and Tunbridge Wells, reflecting the larger size requirements of industrial occupiers. Whilst the stock of industrial floorspace fell across Sevenoaks over the period to 2012, Tunbridge Wells experienced modest increases. The reverse is evident when considering office floorspace which increased in Sevenoaks up to 2012 and reduced in Tunbridge Wells.
- Employment floorspace is concentrated in the main urban areas of Sevenoaks town and Royal Tunbridge Wells. There are also concentrations in Swanley and Paddock Wood, with a distribution of smaller employment premises across more rural areas of both authorities. Data has been mapped across the FEMA and

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highlights concentrations of employment space in Tonbridge, close to the local authority boundary, as well as north towards Aylesford and the M20 corridor.

- Both areas are characterised by an ageing stock of employment floorspace with Tunbridge Wells in particular having a comparatively large number of commercial properties built before 1950. In both areas under 10% of the stock was constructed post 1999.
- Notwithstanding this, new floorspace has continued to come forward with a review of council monitoring data revealing that 85,632 sq m of floorspace was completed over the 7 year period to 2014/15. The largest share of this floorspace being completed in Tunbridge Wells. Completion rates have, however, fluctuated across both areas; in Sevenoaks ranging from a high of 4,670 sq m in 2011/12 to a low of 1,646 sq m in 2012/13 and in Tunbridge Wells from 27,827 sq m in 2011/12 to 1,620 sq m in 2013/14.
- Significant losses of B1a floorspace have been reported across both areas in the relative absence of any significant new development of office floorspace. Permitted development rights for office to residential conversions have exacerbated these losses and are expected to continue to represent a significant threat to the supply of office floorspace across the local authorities.
- Overall, the areas stock of employment floorspace is being lost at a much faster rate than it is being replenished. Over the period from 2008/09 the area has collectively lost 133,324 sq m of B Use Class employment floorspace, resulting in a net loss of 47,692 sq m, when completed employment floorspace is taken into account.

## 6. Understanding Market Performance

- 6.1 Understanding the dynamics of the commercial property market and recent trends in availability and supply of employment land and floorspace is beneficial in establishing the extent of revealed and latent demand for different types of commercial floorspace across Sevenoaks and Tunbridge Wells.
- 6.2 To set the analysis in its wider context, Colliers have considered recent trends in the occupier and investment markets at a national level. This is followed by a more detailed analysis of changes in supply and demand for commercial property across the South East and Kent, as well as locally across Sevenoaks and Tunbridge Wells, drawing on a range of secondary data sources.
- 6.3 Colliers have also examined market data on lettings, transactions and availability and have supplemented their analysis with intelligence from locally based commercial agents in order to build a detailed picture of supply and demand for both B use class and non B uses across the area.

### Office Market

#### UK & South East

- 6.4 The largest office market in the UK is London. A shortage of new supply and availability of refurbished stock constrained the number of office transactions towards the end of 2015 in Central London. The London vacancy rate has now fallen for eleven successive quarters.
- 6.5 Grade A availability continued to decline in Q4 2015 across the City and West End markets, ending the year 43% down on the availability supply for 2014. Whilst the availability of second-hand space increased in the West End, across London as a whole it was down by 23% year on year. Prime rents remain at record levels in a number of submarkets, with the West End and City headline figures remaining at £125 per sq ft (£11.61 per sq m) and £70 per sq ft (£6.50 per sq m) respectively in January 2016.
- 6.6 In contrast to slowing growth in Q4 for most of London, IPD report<sup>49</sup> that regional (outside of London) annual rental growth generally continued its upward trajectory, led by Eastern Offices (7.9%), the South West (5.9%) and the West Midlands (5.0%). This is being driven by good levels of occupier demand and employment expansion in these regional market areas.
- 6.7 Demand across non-core submarkets continues to originate from a wide range of occupiers requiring affordable Grade A space. Cost-effective options are drawing tenants to affluent west London suburbs which currently offer a discount to central London rents.
- 6.8 Foreign investors continue to drive the market in Central London accounting for over 50% of office transactions by value. At regional level foreign investors remain active with several notable deals concluded in 2015. These include AEW Europe's purchase of the

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<sup>49</sup> IPD (2016)

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Bath Road multi-let offices in Slough from SEGRO for £325m and Ho Bee (Singapore) acquired Apollo and Lunar House in Croydon for £99m.

- 6.9 In Q4 2015 South East investment transactions totalled £1.31 billion which compares to £0.748 billion in Q1 2015, £1.44 billion in Q2 2015 and £0.98 billion in Q3 2015. Investment transaction volumes totalled £4.475 billion in 2015, up 16% compared to the £3.85 billion transacted in 2014 and £2.1 billion in 2013. There were more than 200 office deals completed in the South East in 2015.
- 6.10 The weight of money from UK Institutions and Private Equity houses remains the main driving force behind the South East investment market. The spectrum of buyers is diverse and includes the traditional property companies who remain very active, high net worth private individuals and overseas investors.
- 6.11 Multi-let town centre assets continue to attract the greatest interest and achieve the greatest price. Value-add assets offering management angles also remain keenly sought after by investors, as these offer the chance to capture the rental growth.
- 6.12 The Government's decision to extend Permitted Development Rights continues to reduce secondary office stock in town centres and aids rental growth but impacts on the availability of office stock for rent in the market and on vacancy rates. This rental growth is ensuring there is no slowdown in investor interest which is understandable when the London vacancy rate is falling and has been for three years; it is now at a 15 year low of c.3%.
- 6.13 Annual office accommodation take-up across the South East in 2015 reached 3.84 million sq ft (356,748 sq m) which represented a 12.5% increase on the 2014 figures<sup>50</sup>. As shown in Figure 6.1 the Thames Valley area has seen the most take up over the last 3 years, however the South M25 market remained strong with occupier activity reaching a figure of c.1m sq ft. As a result availability in the South M25 sub-sector was down and the vacancy rate reduced to 12.2%<sup>51</sup>.
- 6.14 Colliers report that 53% of take-up was for Grade A product, demonstrating that tenants active in this market continue to look for the best quality space in order to offer the most efficient, attractive, comfortable and convenient accommodation offer for employees, customers and clients.

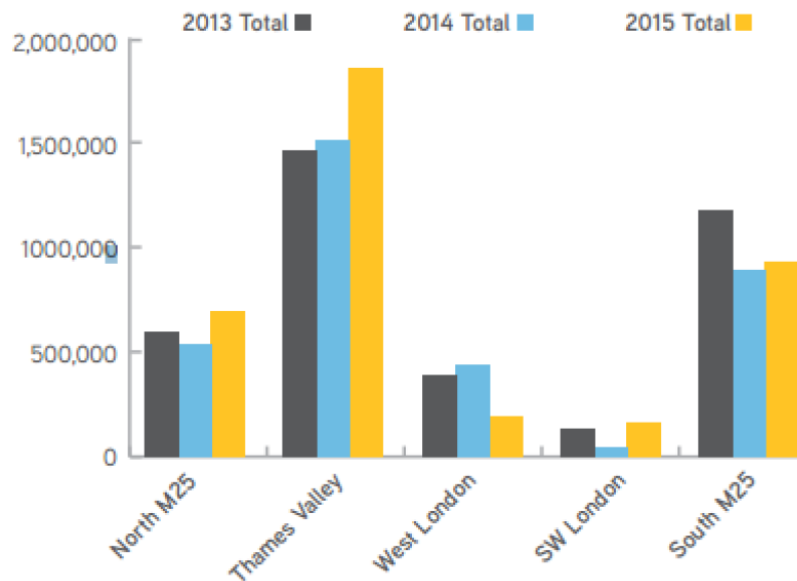
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<sup>50</sup> Colliers International (2016)

<sup>51</sup> Colliers International (2016)



**Figure 6.1: Office take up**



Source: Colliers International

- 6.15 Central London’s rapidly increasing rents and supply decrease is beginning to reach the tipping point where many occupiers have looked to relocate to the South East. Across the region in 2015, total office investment turnover was £4.48 billion, a 16% year on year increase<sup>52</sup>. Colliers report that funds led the market with 37% of transactions with property companies at 31% and private investors representing 13% of transaction volume.
- 6.16 Q4 2015 prime South East office yields remained static from the previous quarter, holding at 5.15%. Colliers estimate total investor returns for South East offices to 2020 (rental growth and capital value appreciation) to average 7.15% per annum; this figure would be down on the 9.8% per annum averaged over the last five years<sup>53</sup>.

**Local Office Market Context**

- 6.17 Improving economic conditions have contributed to greater commercial property activity across Kent in 2015, with the area experiencing rental growth for the first time since the 2008 financial crisis<sup>54</sup>. Tenant demand in Kent is from a range of sectors, with the extensive retail provision across the region and good accessibility to London serving to bolster demand further.
- 6.18 The office sub-markets of Sevenoaks Town and Royal Tunbridge Wells are characterised by local occupiers such as local solicitors, accountants, architects and professional services occupiers. The office accommodation tends to be period properties that have been refurbished by landlords to offer a modern workspace provision.
- 6.19 The area has attracted many prestigious companies. Cripps LLP, a major solicitors practice who have recently invested in new premises and AXA PPP Healthcare, one of

<sup>52</sup> Colliers International (2015)  
<sup>53</sup> IPD (2016)  
<sup>54</sup> Kent Property Market Review (2015)

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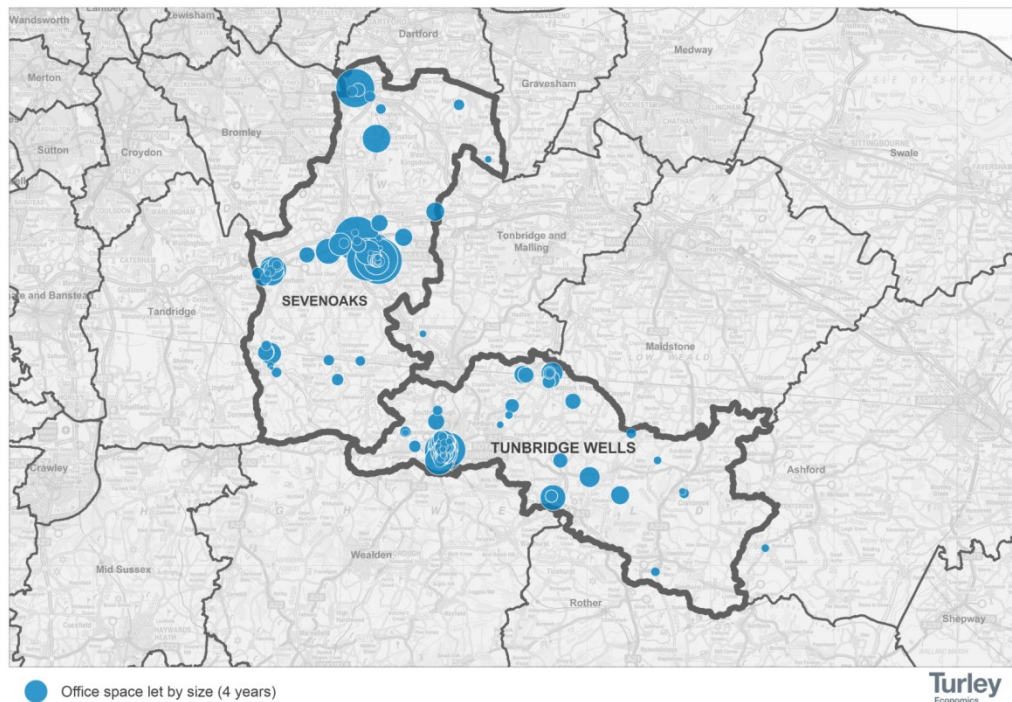
the largest private health care providers in England who have major offices in Royal Tunbridge Wells.

- 6.20 In Sevenoaks, there are a number of local professional consultancy practices including architects Offset, Open and BHD who have strong reputations across the region. Construction organisation FM Conway acquired the 40,000 sq ft (3,716 sq m) Becket House in Sevenoaks Town to refurbish as their new head office. Countryside Properties opened a regional office in St John's House in Sevenoaks Town in April 2015<sup>55</sup>.

### ***Demand***

- 6.21 Data sourced from CoStar enables an understanding of the spatial distribution of demand in Sevenoaks and Tunbridge Wells, based on office lettings recorded over a four year period (2011 – 2015). This is illustrated at Figure 6.2, which aggregates lettings to show the total amount of office floorspace let at each postcode.

**Figure 6.2: Amount of Office Space Let by Postcode (2011 – 2015)**



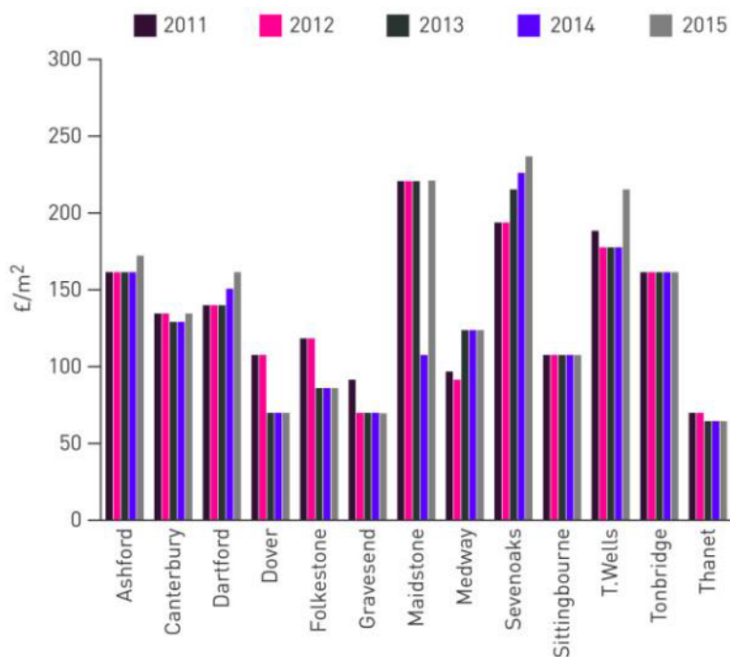
Source: CoStar, 2016; Turley, 2016

- 6.22 Over the period from 2011 to 2015 a total of 399,653 sq ft (37,129 sq m) of office floorspace was let across Sevenoaks and Tunbridge Wells. It is evident that a considerable amount of office space has been let in the main urban areas of Sevenoaks Town and Royal Tunbridge Wells over the period assessed, with lettings also recorded in areas such as Swanley, Westerham and Paddock Wood. There is a more limited take-up of office space across more rural areas, where there is an overall smaller supply of office premises.

<sup>55</sup> Kent Property Market Review (2015)

- 6.23 Local agents comment that there is good demand from existing local and regional occupiers looking to expand or upgrade, however similar to the wider South East, demand is constrained by a lack of suitable, purpose built accommodation.
- 6.24 A comparison of rents and rental growth in the UK, South East and Kent, is shown in Figures 6.3 and 6.4 below. As Figure 6.2 illustrates, Maidstone, Sevenoaks and Tunbridge Wells command the highest rents in the region with headline rents for 2015 reaching £23.00 per sq ft (£2.13 per sq m) in Sevenoaks and £18.00 per sq ft (£1.67 per sq m) in Tunbridge Wells. The rents in Tunbridge Wells have been relatively static since 2012 but the town has now realised rental growth through the increase in demand and scarcity of supply as the economy strengthens.
- 6.25 Colliers are aware of a requirement for circa 40,000 sq ft (3,716 sq m) of office floorspace for an insurance company in Sevenoaks Town centre but currently there is no suitable building able to facilitate this requirement. Colliers consider that this is unlikely to change in the absence of a comprehensive development in the town.

**Figure 6.3: Kent office rents**



Source: Claxtons as presented in Kent Property Market (2015)

**Figure 6.4: Kent, UK and South East Office Rental Growth**



Source: MSCI as presented in Kent Property Market (2015)

**Supply**

- 6.26 Appendix 1 provides a list of office stock currently available in the area. It is notable, however, that there has been a lack of office development in Sevenoaks and Tunbridge Wells since the financial crisis in 2008 and the recent upturn in demand has absorbed availability further. Colliers estimate that there is currently less than two years supply of office space available in the market if historic take-up levels remain. Furthermore, a large percentage of this is likely to be obsolete for modern day office occupation and as a result an increasing amount of stock is being lost to alternative uses.
- 6.27 The permanent extension to Permitted Development Rights enabling conversion of offices to residential use - first introduced as a temporary measure in 2013 - is expected to absorb stock further, driving down vacancy rates and acting as a constraint to the market.
- 6.28 Within Sevenoaks District there are currently exemptions in place at the 160 London Road (formerly British Telecom Building), additional parts of London Road and parts of the Westerham Trading Centre.
- 6.29 However, there are recent examples of office buildings in the area that have been lost to alternative uses including:
  - Tubs Hill House, Sevenoaks town – 64,800 sq ft (6,020 sq m) recently sold to Wilmott Dixon who has plans to convert the building into apartments.

- Union House, Tunbridge Wells – 70,000 sq ft (6,503 sq m) office bought by Dandara for residential development. An EIA Screening Opinion for redevelopment to provide 127 residential dwellings; retail/community/office floorspace totalling approximately 851 sq m (GIA); and associated private and public parking totalling 215 spaces, was submitted to Tunbridge Wells Borough Council in April 2016<sup>56</sup>.
- Merevale House, Tunbridge Wells - 17,000 sq ft (1,579 sq m) old building currently let to the Court Service until 2017. A prior notification for the change of use of floors 3 and 4 from office to residential use was received in March 2015<sup>57</sup>.
- Vale House, Tunbridge Wells - 20,000 sq ft (1,858 sq m) – Vale House is an older office building currently let until 2018. It is understood the building was recently purchased by a private investor for conversion to residential, although to date no application has been received.

6.30 The residential market in both Sevenoaks and Tunbridge Wells remains particularly strong, with strong demand for new homes that come onto the market. The areas connectivity to central London adds to the appeal of both areas and creates a vibrant market for commuters. The amenities of both Sevenoaks and Tunbridge Wells and their respective town centres further enhances the attractiveness of the area to prospective purchasers, with demand putting upward pressure on residential property values.

6.31 Examples of two new build schemes by The Berkeley Group illustrate just how lucrative residential development can be in this area. Rye Lane in Sevenoaks contains one bed apartments that range in value from £550 - £620 per sq ft<sup>58</sup> (£51- £57 per sq m). Royal Wells Park, in Tunbridge Wells has units on sale that equate to £550 per sq ft (£51 per sq m) for two bed apartments and £540 per sq ft (£50 per sq m) for a 3 bed house;<sup>59</sup> when office investment deals range in capital value from £120 to £350 per sq ft (£11-33 per sq m) it is clear why residential developments are so popular in both areas.

### ***Leasing Market Activity***

6.32 Looking forward Colliers office and research teams foresee 'business as usual' in the South East with demand outstripping supply. Rental growth currently drives the investment market in the South East and with supply continuing to lag behind demand; this is not expected to change. Appendix 2 provides a list of recent office lettings in Sevenoaks and Tunbridge Wells.

### ***Investment Market***

6.33 The prime yield figure of 5.15% for the South East region (excluding London) compares with 8.3% for Kent as an average; this is the strongest figure the county has seen since 2007<sup>60</sup>, however this lack of growth does mean that the investor demand for offices in Kent is weaker than in the South East as a whole. As the South East includes established office areas such as Guildford and Slough then this is understandable.

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<sup>56</sup> Application Ref: 16/503220/ENVSCR

<sup>57</sup> Application Ref: 15/501703/PNJCLA

<sup>58</sup> Rightmove (2016)

<sup>59</sup> Rightmove (2016)

<sup>60</sup> Kent Property Market (2015)

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- 6.34 Colliers are predicting subdued yield compression in 2016, with many core markets approaching near peak levels in the current cycle. There is therefore potential for investors, particularly those who are being priced out of traditional core markets across London and prime South East office areas, to look further afield to locations such as Tunbridge Wells and Sevenoaks where value can be found in commercial stock let to tenants with strong covenants.
- 6.35 Recent years have witnessed increased demand from local businesses to owner occupy their business premises. For example Beckett House, an office building which extends to 40,000 sq ft (3,716 sq m) on the Vestry Industrial Estate in Sevenoaks was bought by F.M Conway for circa £4m. Conway secured the site from other interested parties which included developers looking to convert the building into residential demonstrating tenant demand. This type of inward investment can be attributed to an increase in both business confidence and trade volumes.
- 6.36 Table 6.1 lists office investment transactions in Sevenoaks and Tunbridge Wells since November 2013.

**Table 6.1: Office Investment Transactions Sevenoaks and Tunbridge Wells**

Date	Address	Price	Yield	Notes
December 2015	1 Suffolk Way, Sevenoaks	£4.6m	6.29%	14,524 sq ft (1,349 sq m) multi-let building bought by RO Real Estate from Marley Pension Limited
August 2015	Prospect House, 8 Pembroke Road, Sevenoaks	£2.53m	7.00%	8,906 sq ft (827 sq m) building bought by Drapers Company purchased from M&M Property Asset Management LLP
May 2015	Brooke and Seymour House, Mount Ephraim Road, Tunbridge Wells	£3.5m	10.00%	20,057 sq ft (1,863 sq m) of office accommodation purchased by Stonegate Homes Ltd from Savills IM European Commercial Fund
April 2015	Merevale House, London Road, Tunbridge Wells	£2.47m	5.35%	17,871 sq ft (1,660 sq m) of office accommodation bought by Silvercoin-Investment Ltd from a private vendor
March 2015	Suffolk House, Sevenoaks	£4m	7.00%	17,500 sq ft (1,626 sq m) of offices bought by Sevenoaks District Council from an undisclosed vendor

Date	Address	Price	Yield	Notes
November 2014	77 Mount Ephraim, Tunbridge Wells	£6m	8.00%	An undisclosed buyer purchased the 49,428 sq ft (4,499 sq m) office building from MCL Group Ltd
September 2014	Union House, Pantiles, Tunbridge Wells	£9m	8.9%	68,448 sq ft (5,991 sq m) purchased by Dandara Ltd from the British Steel Pension Fund. An EIA Screening Opinion for redevelopment to provide residential, retail, community and office floorspace was submitted in April 2016 <sup>61</sup>
July 2014	26-28 Pembroke Road Sevenoaks	£2.55m	8.34%	9,352 sq ft (869 sq m) bought by The Milton Group Limited from Oaktree Capital Ltd
May 2014	Osprey House, Black Eagle Square, Westerham	£1.37m	7.17%	7,041 sq ft (654 sq m) bought by a private investor
November 2013	Tubs Hill House, Sevenoaks	£5.5m	5.24%	64,800 sq ft (6,020 sq m) bought by Development Securities and MarlinSPIKE from administrators. The building was subsequently sold to Wilmott Dixon for £11m with plans to convert the building into apartments.

Source: CoStar, 2016

<sup>61</sup> Application Ref: 16/503220/ENVSCR



### Industrial & Logistics Market

#### UK and South East

- 6.37 In the broadest sense, the UK industrial property market is split between manufacturing and distribution warehouses. The strength of domestic consumer goods demand continues to be the main support for this sector in the UK, with exports continuing to struggle due to weak global trade and exchange rate volatility.
- 6.38 The UK manufacturing industry experienced an overall output decline in 2015 by 1.7%, largely due to challenges including the strength of the pound sterling making UK exports less attractive in terms of value and increased competition, a trend that looks set to continue in the short term.
- 6.39 UK warehouse space take-up in 2015 reached 24m sq ft, (c.2.2m sq m) 9.5% higher than the long term average of 22m sq ft (2.0m sq m) Colliers International estimate that the UK will require an additional 64.5 - 108m sq ft (6-10m sq m) of distribution space between 2016 and 2020, based on anticipated demand fuelled by the buoyant e-commerce sales growth. Consumer goods demand is likely to be the continued driver behind distribution growth moving forward.
- 6.40 The North West saw the strongest prime rental growth in 2015, driven by accelerating activity in the multi-let sector. Continued tenant demand and decreasing vacancy rates is helping to strengthen the rental growth prospects for industrial and logistics properties in the North West<sup>62</sup>.
- 6.41 In the South East, where land values saw marked uplifts due to supply shortages, strong levels of absorption were observed. The continued lack of speculative development has caused the market to experience high levels of competition both in Central London and the outskirts. The South East market continues to attract a vast number of occupiers, though the market continues to face healthy competition from alternative uses<sup>63</sup>.
- 6.42 However, London and Eastern regions witnessed lower transaction levels, mainly due to the lack of new stock, particularly in the 100,000 sq ft + (9,290 sq m) band. Indeed, availability continues to fall across all regions for this type of product with design and build being the only option in most locations. The growth in demand for multi-channel/e-commerce orientated warehouse units may present opportunities for landlords to retrofit or redevelop existing product, but only where circumstances allow.
- 6.43 As shown in Figure 6.5, the South East region led the take up of industrial space in the UK for the third consecutive year, with take-up reaching 16m sq ft (c.1.5 sq m) in 2015, increasing from 13.5m sq ft (1.25 sq m) in 2014. Availability has been gradually falling since the end of economic recession due to increased demand for distribution space coupled with the reluctance of developers to build units speculatively and a lack of available development finance in the wake of the financial crisis.

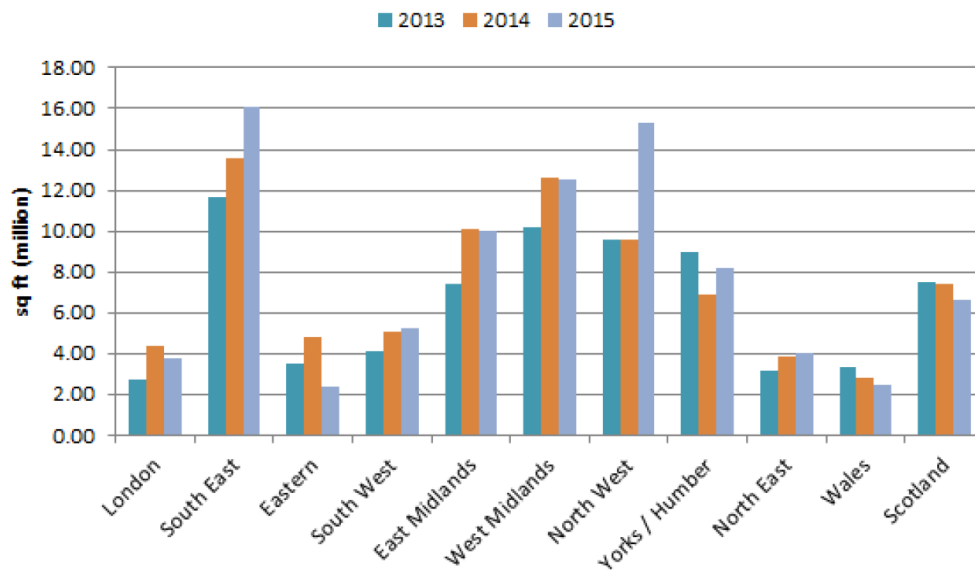
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<sup>62</sup> Colliers International Industrial and Logistics Third Edition 2015

<sup>63</sup> Colliers International Industrial and Logistics Third Edition 2015



Figure 6.5: UK Industrial Take Up 2013-2015



Source: Colliers International

- 6.44 The strong demand for industrial space in the South East and reduced supply has led to the strengthening of the industrial investment market across the region with prime South East industrial yields standing at 5.1% at the end of 2015.
- 6.45 Colliers estimate average returns (rent and capital value appreciation) of 7.6% per annum through to 2020 for the South East. The lack of stock also paves the way for an influx of speculative development across the region. However, as a result of limited yield compression due to the market approaching ever nearer historic peak yields, these estimated returns would be down from the annualised 12.4% total returns over the last 5 years.

**Local Industrial & Logistics Market Context**

- 6.46 The Local Authority areas of Sevenoaks and Tunbridge Wells are home to a number of small business and industrial parks that cater for local demand.
- 6.47 The principal industrial estate in Sevenoaks is the Vestry Estate on Vestry Road. It is predominantly 1960s and 1970s warehousing with units ranging in size from 2,000 to 25,000 sq ft<sup>64</sup>. Another key estate is the Chaucer Business Park on Watery Lane. The 4 hectare business park that was developed in the late 1980s and early 1990s has units ranging from around 1,500 to 7,000 sq ft (139 to 650 sq m)<sup>65</sup>.
- 6.48 Within Tunbridge Wells Borough, the principal industrial estates are High Brooms, North Farm and Transfesa and Eldon Way Industrial Estates at Paddock Wood. High Brooms and North Farm are accessed via the A26 or the A21 for road access and are both in very close proximity to High Brooms Rail Station. Paddock Wood is further to the east and is accessed via the A228.

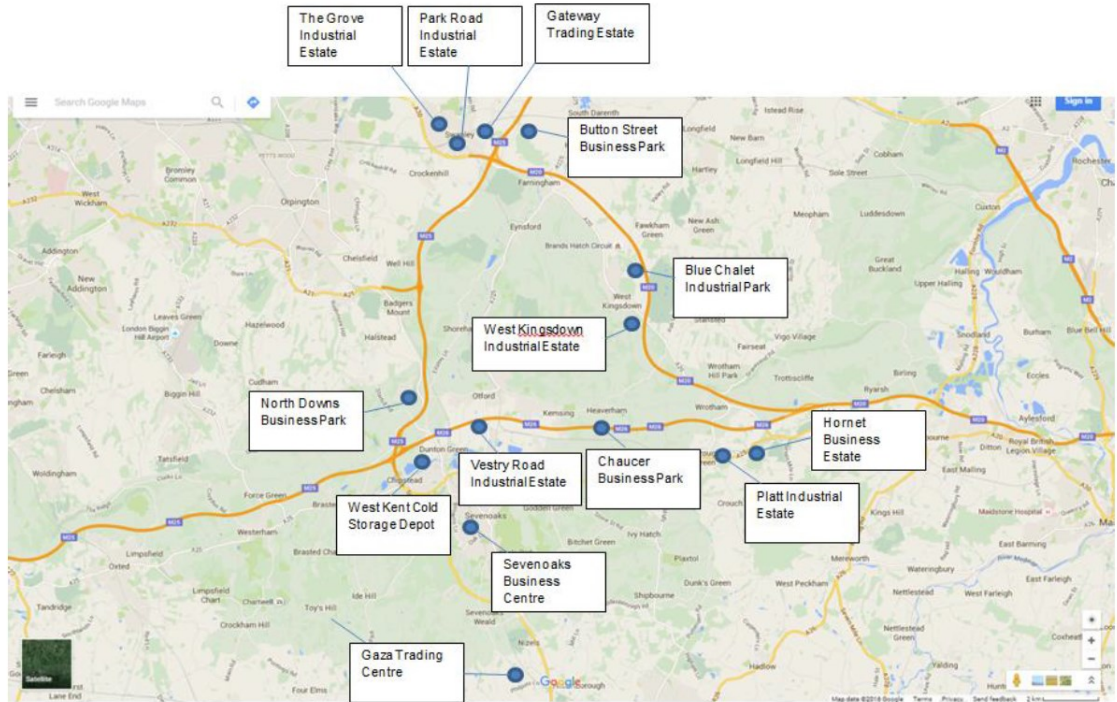
<sup>64</sup> McMeeking (2016)

<sup>65</sup> McMeeking (2016)

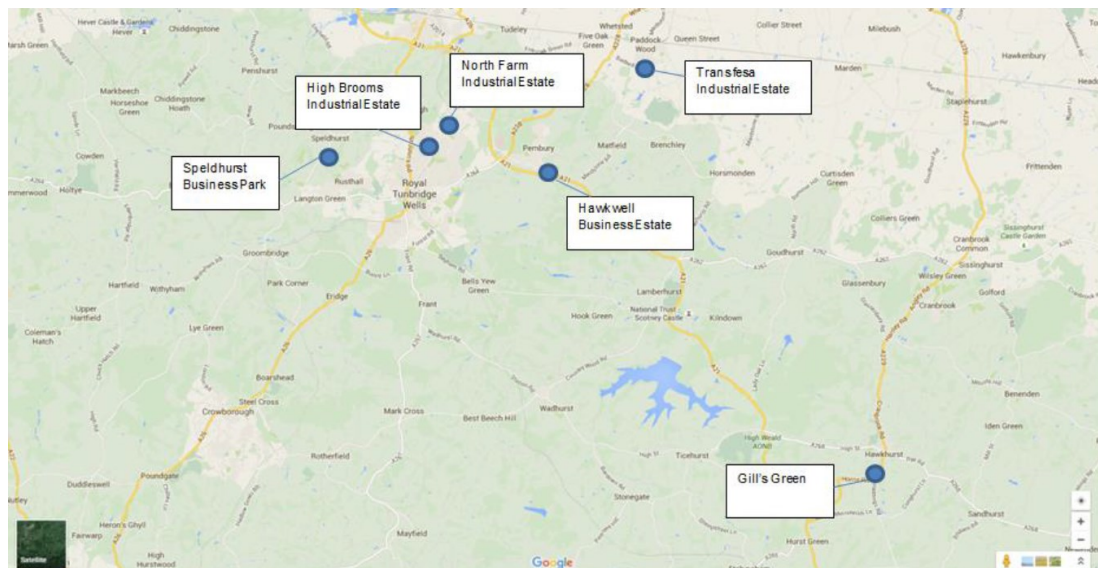
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- 6.49 Throughout the wider Borough of Tunbridge Wells there are a number of rural industrial estates including Transfesa Industrial Estate and Eldon Way both in Paddock Wood, Gills Green in Hawkhurst, Speldhurst Business Park and the Hawkwell Business Estate at Colts Hill, Pembury.
- 6.50 Other business park accommodation in Sevenoaks and Tunbridge Wells is shown in Figures 6.6 and 6.7 below.

**Figure 6.6: Sevenoaks Employment Areas**



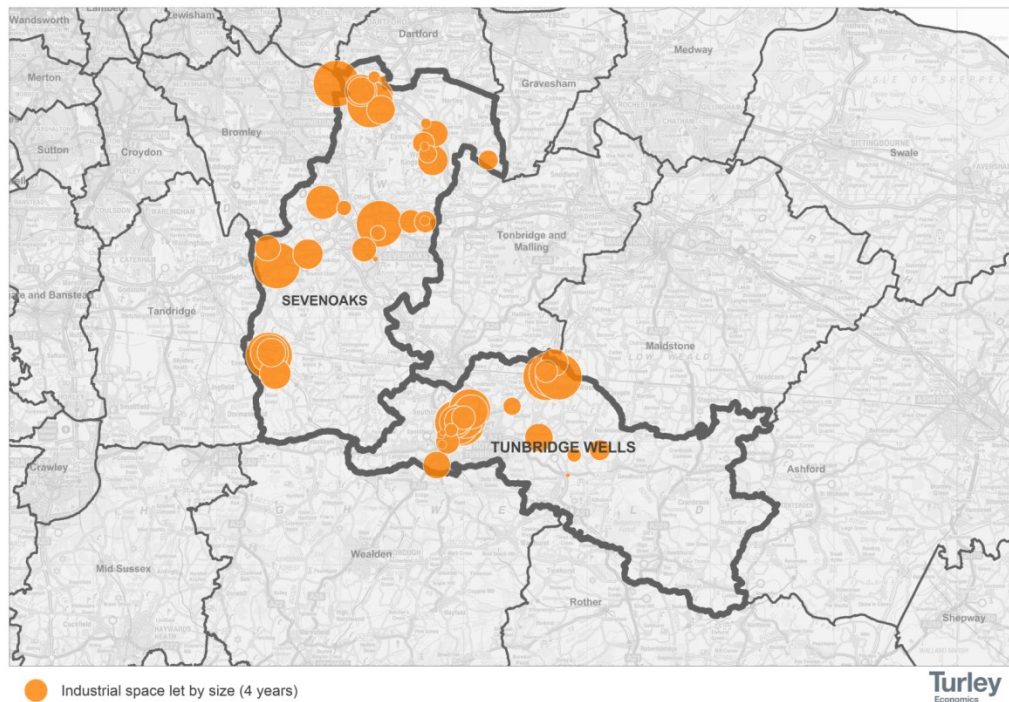
**Figure 6.7: Tunbridge Wells Employment Areas**



**Demand**

- 6.51 Data sourced from CoStar enables an understanding of the spatial distribution of demand in Sevenoaks and Tunbridge Wells, based on industrial lettings recorded over a four year period (2011 – 2015). This is illustrated at Figure 6.8, which aggregates lettings to show the total amount of industrial floorspace let at each postcode.

**Figure 6.8: Amount of Industrial Space Let by Postcode (2011 – 2015)**



Source: CoStar, 2016; Turley, 2016

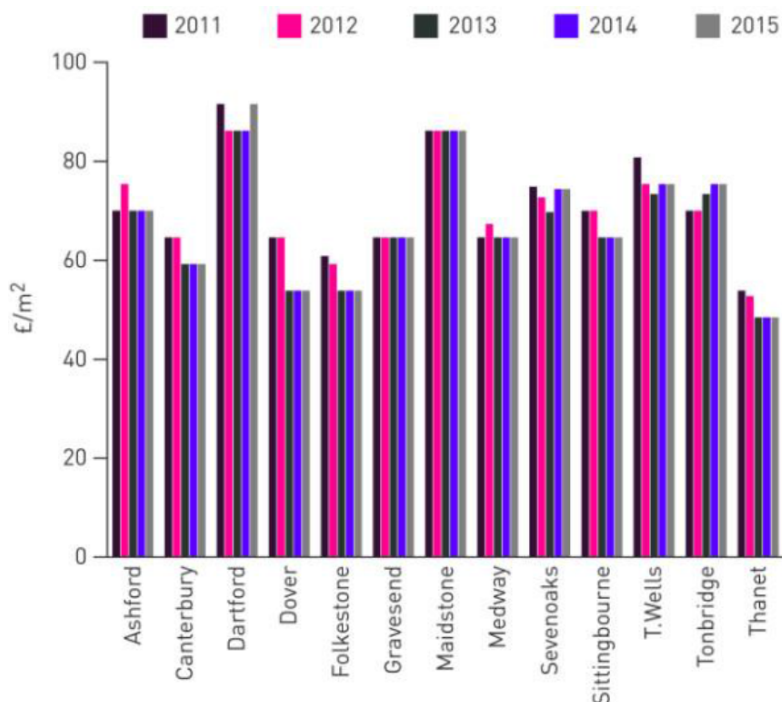
- 6.52 Over the period from 2011 to 2015 a total of 656,341 sq ft (60,976 sq m) of industrial floorspace was let across Sevenoaks and Tunbridge Well.
- 6.53 While the earlier analysis of the office market identified a clearer skew towards urban areas, there is a more balanced distribution of demand for industrial premises in the District, based on lettings recorded over this period. There do, however, remain clusters of take-up in locations such as Royal Tunbridge Wells, Swanley, Paddock Wood and Edenbridge.
- 6.54 The wider Kent industrial market has seen inward investment from the supermarket retailers Asda, Lidl, Ocado and Aldi in the last two years<sup>66</sup>. These deals underpin the trend for large retailers and supermarket retailers to move towards a strategic logistic portfolio. However, these locations in Kent are predominantly outside of the Sevenoaks and Tunbridge Wells boundaries in established logistics areas such as Maidstone and Dartford.

<sup>66</sup> Kent Property Market (2015)

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- 6.55 Figure 6.9 shows that Sevenoaks and Tunbridge Wells' industrial markets are amongst the stronger contingency in Kent in terms of rental values, yet remain markedly behind Dartford and Maidstone given their role as an industrial property market hub. Indeed, Maidstone and Dartford are key industrial and business park hubs in the County and the London Gateway Development north of Dartford across the River Thames is one of the largest logistics parks in Europe.
- 6.56 The Kings Hill Business Park near West Malling which has over 800,000 sq ft (7,432 sq m) of business space with consent for a further 1.2m sq ft (111,483 sq m)<sup>67</sup>. Over 200 companies are based here including Barclays, Balfour Beatty and Rolex. From an office perspective the developments of new B1 space in Croydon from the Ruskin Square development, the Hammerson Development and the various other office and residential mixed use schemes in the town centre could impact. With transport accessibility from London and the prestige of being in a greater London location with all the recreational and shopping requirements on the doorstep this will be enticing for occupiers looking for new space.
- 6.57 The South East as a region has shown the greatest increase in rents over the last year, with rents increasing c. 4% during 2014. Kent is also showing growth in line with the South East and the U.K generally. See Figure 6.6.

**Figure 6.9: Kent Industrial Rents**



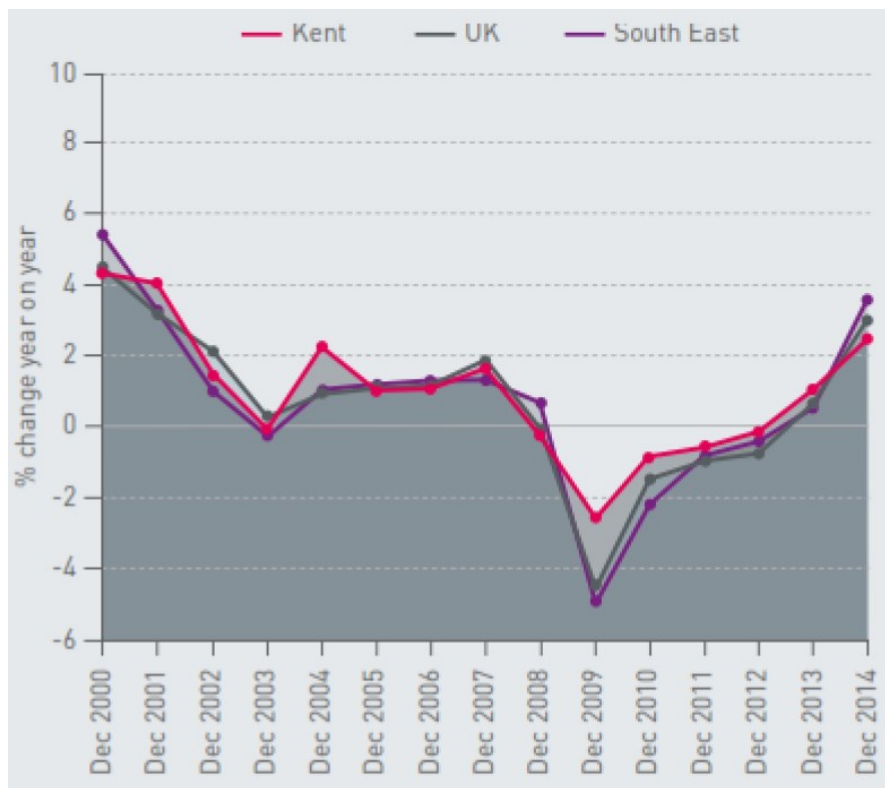
Source: Caxtons as presented in Kent Property Market (2015)

- 6.58 Headline rents in Sevenoaks in 2015 were £6.60 per sq ft and £6.70 per sq ft in Tunbridge Wells which remains behind 2011's figure of c. £7.50 per sq ft.

<sup>67</sup> Kings Hill (2016)



**Figure 6.10: UK, Kent and South East Industrial Rental Growth**



Source: MSCI as presented in Kent Property Market (2015)

**Supply**

- 6.59 Supply has generally decreased over recent years in the wake of the financial crisis along with the rest of the UK. This has reduced commercial property developers' appetites to speculatively build or fund commercial premises without a pre-let commitment in place.
- 6.60 Similar to the office market a key challenge facing the sector is the availability of industrial land for development. Land in and around commuter towns is lucrative for developers for residential development. With the strain on housing supply in London continuing, it is predicted that demand and growth will ripple out to the South East and London's commuter belt.
- 6.61 A planning application has been approved for the redevelopment of Fort Halstead in Sevenoaks for up to 200,000 sq ft of business park space in addition to 450 homes<sup>68</sup>. This scheme should go some way to easing the supply squeeze, although it is notable that as the proposal is replacing existing jobs, there is likely to be no net gain in employment on the site.
- 6.62 Appendix 3 summarises recent industrial letting activity across Sevenoaks and Tunbridge Wells.

<sup>68</sup> Kent Property Market (2015)

**Investment Market Activity**

- 6.63 The December 2015 prime yield for South East industrial property stood at 5.1%<sup>69</sup>, the average yield across Kent fell to 7%<sup>70</sup>. Much like the office market, muted yield compression is expected across the UK in 2016 with many markets approaching the strongest yield figures seen in the current cycle.
- 6.64 This increases the attractiveness of industrial stock in markets such as Sevenoaks and Tunbridge Wells that are well connected to the transport network and offer high yielding multi-let estates with significant asset management opportunities. Transactional activity is expected to cool slightly this year, particularly in the first half, but should gather some steam toward the year end as ‘Brexit’ uncertainty fades<sup>71</sup>.

**Table 6.2: Recent Investment Deals**

Date	Address	Price	Yield	Notes
December 2015	BKT Factory, North Farm Road, Tunbridge Wells	£1.75m	8.43%	345,000 sq ft (32,051 sq m) industrial unit let to Brown, Knight & Truscott Ltd; purchased by a private investor
June 2015	Units 1-13 - Dana Trading Estate, Transfesa Road, Tunbridge Wells	Portfolio sale	8.25%	188,189 sq ft (17,483 sq m) of industrial space purchased by Morgan Stanley Real Estate and C2 Capital. The assets were bought as part of a wider portfolio totalling £23m.

Source: CoStar, 2016

<sup>69</sup> IPD (2016)

<sup>70</sup> Kent Property Market (2015)

<sup>71</sup> Colliers International February 2016 Property Snapshot

## Retail and Leisure

- 6.65 High Street retailing bounced back in January 2016, according to Visa Europe's Spending Index, with a 2.7% rise year on year, the largest increase since 2014.
- 6.66 It is notable that *'spending on clothing and footwear rose by 5%, but that was beaten by a 7.8% increase in spending on recreation and cultural activities and a 9.7% increase in spending on hotels, restaurants and bars'*<sup>72</sup>.
- 6.67 With the UK economy stable, strong consumer confidence, improving wage growth and the intention of a minimum wage rise in April 2016, retail spend is increasing and retailers are seeing signs of recovering from the effects of the recession.
- 6.68 Meanwhile, online retailing grew by 14.9% in January compared to January 2015<sup>73</sup>. Online retailing has been the primary shopping arena for price conscious consumers and has seen the strongest growth in and around smaller towns of the South East of England. Tunbridge Wells, with a comparison spend of £435m, is a multi-channel/e-commerce<sup>74</sup> purchasing 'hotspot' and only Guildford has a higher multi-channel spend in the UK<sup>75</sup>. This high consumer confidence is expected to remain in 2016. This is partially down to commentators predicting that the 0.5% Bank of England interest rate will remain until November 2016 at the earliest if not into 2017<sup>76</sup>.
- 6.69 The growth of internet shopping is allowing customers to compare items from a number of retailers, and as a result, retail units are increasingly becoming show rooms as less physical space is required. The effect of internet shopping growth is that retailers are being specific about the space they take; their decisions are becoming ever more strategic leading to a divergence in rental levels dependent on location on the high street<sup>77</sup>.
- 6.70 The divergence in rental levels is expected to result in a divergence of capital values from the prime growth areas to the secondary areas which remain stable in growth. This should in turn result in an increase in investment activity as secondary units are bought by speculative property investors waiting for the return of income streams in secondary locations.
- 6.71 Convenience food shopping is in decline and the frantic race for space which drove up many high street rents is no longer on. Food retailers are being extremely considered in their acquisitions and disposing of their non performing stores. This strong macro-environment combined with growing retail sales volumes would normally result in decreasing voids and increasing growth. But UK retailing has experienced a paradigmatic shift, which will continue to impact the property market for some time to come<sup>78</sup>.

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<sup>72</sup> EGI 08.02.16

<sup>73</sup> British Retail Consortium 09.02.16

<sup>74</sup> Channels include retail stores, online stores, mobile stores, mobile app stores, telephone sales and any other method of transacting with a customer

<sup>75</sup> Experian

<sup>76</sup> The Telegraph 04.02.16

<sup>77</sup> Colliers National Retail Barometer Autumn 2015

<sup>78</sup> Colliers National Retail Barometer Autumn 2015

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- 6.72 In 2017 the rates revaluation will take place, this may help retailers outside of London if as predicted they see a rate decrease; but rents are rising and it remains to be seen if a decrease in rates will be felt in real terms.

### Local Retail Market Overview

#### *Sevenoaks Retail Market*

- 6.73 Retail floor space in Sevenoaks is estimated at 0.33 million sq ft (30,658 sq m). The space is predominantly located in three retail areas:

- Town Centre
- Riverside Retail Park
- Otford Retail Park

- 6.74 As shown in Table 6.3 the total market share of comparison goods spend in the three main retail areas of Sevenoaks is 9% which is an aggregate of £52,987,956 per annum. The District has a total shopper population, (people who regard Sevenoaks District as their main retail shopping destination) of 23,011<sup>79</sup>.

**Table 6.3: Sevenoaks District Comparison Spend Breakdown**

Retail Area	Shopper Population	Comparison Spend	Market Share
Town Centre	18,482	£42,360,330	7%
Riverside Retail Park	2,948	£6,940,962	1%
Otford Retail Park	1,581	£3,683,664	1%

Source: Experian, 2016

- 6.75 The strongest retail pitch of Sevenoaks is the town centre. The national retail brands in the town are Pizza Express, Wagamama, Cote and Bills for restaurant A3 use. Waitrose and Tesco provide convenience food retailing and for A2 financial services HSBC Santander and Lloyds bank are present on the High Street. In terms of leisure provision there is a Stag Cinema on the High Street and Sevenoaks Leisure Centre located on Buckhurst Lane.
- 6.76 As shown in Table 6.4 below, there are currently 268 retail units in the town centre, of which 6.72% are vacant.

<sup>79</sup> Experian



**Table 6.4: Sevenoaks town Retail Mix**

Retail Classification	Number of Units
Comparison	91
Convenience	10
Financial & Business Services	39
General Offices	23
Health & Medical Services	2
Leisure Services	32
Public Services	5
Retail Service	40
Transport Services	7
Unclassified Building	1
Vacant Retail	18
<b>Total Units</b>	<b>268</b>
<b>Vacancy Rate</b>	<b>6.72%</b>

Source: Experian, 2016

- 6.77 Riverside Retail Park is c.2.5 miles north of Sevenoaks Town Centre, and is a bulky goods retail park. Tenants on this scheme include Pets at Home, Homebase (including Argos and Habitat), Sainsbury's, Screwfix and Halfords along with a petrol filling station. The scheme is c. 42,000 sq ft (3,900 sq m) and is currently fully let.
- 6.78 Offord Retail Park is the smallest in terms of shopper population at c.1,500 who have a total spend of £3,683,664 at this bulky goods retail park. There are three units totalling 42,000 sq ft (3,900 sq m) the current tenants Wickes, Currys/PC World and Carpetright. Offord Retail Park is north of Sevenoaks Town Centre c.2.5 miles and is located next to Riverside Retail Park.
- 6.79 The shopper population numbers for the combined primary, secondary and tertiary shopping catchments of Sevenoaks, according to the 2011 census is 349,450 broken down as follow:
- Primary - 55,862 people\*
  - Secondary - 160,319 people\*
  - Tertiary - 121,269 people\*

\* The data excludes those under 16 years of age

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- 6.80 Of those who do not choose one of the retail areas of Sevenoaks to carry out their main comparison shop, 20% of the market shop in Tunbridge Wells, 12% shop in Bluewater and 7% in Tonbridge.

**Table 6.5: Sevenoaks Comparison Spend Leakage**

Centre	Type	Comparison Spend	miles	Shopper Population	Market Share
Tunbridge Wells	Town Centre	£127,803,108	10.1	60,240	20%
Bluewater	Major Centre	£77,433,471	12.1	33,152	12%
Tonbridge	Town Centre	£44,386,887	6.4	21,298	7%
Sevenoaks	Town Centre	£42,360,330	0	18,482	7%
Lakeside	Major Centre	£39,726,863	15.4	16,949	6%
Tunbridge Wells - Kingstanding Retail Park area <sup>80</sup>	Retail Park	£29,445,415	9	13,936	5%
Maidstone	Major Centre	£21,644,553	14.3	9,625	3%
Bromley	Major Centre	£20,747,945	11.9	8,461	3%
Orpington	Town Centre	£15,173,047	8.3	6,156	2%
Caterham	Town Centre	£13,886,109	11.7	5,933	2%

Source: Experian, 2016

- 6.81 The 20% market share lost to Tunbridge Wells is not unexpected given the number of units, the mix of retailers and the quality of the retail offer in Tunbridge Wells. It is also not unexpected that Bluewater receives 12% of potential spend from Sevenoaks; although 12 miles north of the town centre, Sevenoaks has a higher than average car ownership and Bluewater ranks second in the top 20 shopping centres in the UK<sup>81</sup>.

<sup>80</sup> Defined by Experian as Great Lodge Retail Park & Kingstanding Business Park and covers all retail areas to the north of Longfield Road.

<sup>81</sup> Venue Score 2015-16

**Tunbridge Wells Retail Market**

6.82 The town centre retail floorspace in Tunbridge Wells is estimated to be 1.17 million sq ft (c.109,000 sq m). The three retail areas where comparison shopping is predominantly undertaken within the Borough are:

- Town Centre;
- North Farm Retail area (Kingstanding Retail Park et al); and
- Linden Park Road Retail Park (Sainsbury's and Homebase/Habitat).

6.83 The total market share of comparison goods spend in Tunbridge Wells Borough is 55% which is an aggregate of £238,405,410 per annum. The Borough has a total shopper population, of 358,272. This is split between the catchment areas as follows<sup>82</sup>:

- Primary catchment 76,684\*
- Secondary catchment 160,319\*
- Tertiary catchment 121,269\*

**Table 6.6: Tunbridge Wells Comparison Spend Breakdown**

Destination	Type	Spend	Miles	Shopper Flow	Market Share
Town Centre	Town Centre	£238,405,410	0	106,692	46%
Kingstanding Retail Park area	Retail Park	£36,158,237	2.2	16,742	7%
Linden Park Road Retail Park	Retail Park	£11,899,763	0.7	5,220	2%

Source: Experian, 2016

6.84 The strongest retail pitch is the town centre. Brands in the town centre include Jamie's Italian, Bills, and Cote for restaurant A3 use, Tesco, Iceland, Sainsbury's Local and M&S for A1 convenience food retailing. There are numerous fashion retailers including Russell and Bromley, Hoopers department store, Whistles, and Joules. Metro Bank is one of the most recent openings on the high street improving financial services in the town centre. The High Street area also offers a range of smaller and independent units.

6.85 As shown in Table 6.7 below, there are currently 778 retail units in the town centre of those 13% are vacant.

<sup>82</sup> \* The data excludes those under 16 years of age

**Table 6.7: Tunbridge Wells Retail Mix**

Retail Classification	Number of Units
Comparison	294
Convenience	46
Financial & Business Services	64
General Offices	43
Health & Medical Services	4
Industrial Activities	1
Leisure Services	106
Public Services	11
Religious Services	6
Retail Service	87
Transport Services	13
Unclassified Building	2
Vacant Non-Retail	2
Vacant Retail	99
<b>Total Units</b>	<b>778</b>
<b>Vacancy Rate</b>	<b>12.72%</b>

Source: Experian, 2016

6.86 North Farm Retail Area, approximately 2 miles north east of Tunbridge Wells Town Centre, is the Borough’s main out of centre retail area and comprises of a number of retail parks including:

- Fountains Retail Park providing c.110,000 sq ft (10,219 m<sup>2</sup>) of retail floorspace with occupiers such as M+S Home, Halfords, Home Sense and Staples.
- Kingstanding Retail, which is traditional retail warehouse park of 80,000 sq ft (7,432 sq m) with 2 retail units. The scheme comprises a John Lewis at Home, and a Booker cash and carry unit.
- Tunbridge Wells Shopping Park which comprises is c.40,000 sq ft (3,716 sq m) with Argos Extra, New Look and Next anchoring the scheme.
- Great Lodge Retail Park which comprises c.170,000 sq ft (15,793 sq m).
- Knights Park which is c.100,000 sq ft (9,290 m<sup>2</sup>) leisure park, with a Bowlplex, Nuffield Health and an Odeon cinema. In terms of rents this scheme was ranked 41st most expensive retail park, in terms of rental levels, in 2014.

- There are also other units also present in the area including Asda, Hobbycraft, Oak Furniture.

6.87 Linden Park Road Retail Park is the smallest in terms of shopper population. The parks tenants are Sainsbury's and Homebase with a hotel and restaurant on the periphery of the site. The retail park is c.0.5m south of the town centre.

**Table 6.8: Tunbridge Wells Comparison Spend Leakage**

Centre	Type	Comparison Spend	miles	Shopper Population	Market Share
Tunbridge Wells	Town Centre	£238,405,410	0	106,692	46%
Tonbridge	Town Centre	£39,830,726	4.3	19,301	8%
Tunbridge Wells – Kingstanding Retail Park area	Retail Park	£36,158,237	2.2	16,742	7%
Bluewater	Major Centre	£26,423,967	21.2	12,189	5%
Crowborough	Town Centre	£16,685,717	6.7	6,908	3%
Maidstone	Major Centre	£14,091,401	14.9	6,496	3%
Hastings	Town Centre	£13,337,206	23.5	5,508	3%
Sevenoaks	Town Centre	£13,305,021	10.1	6,268	3%
Tunbridge Wells - Linden Park Road Retail Park	Retail Park	£11,899,763	0.7	5,220	2%
Lakeside	Major Centre	£11,799,428	24.6	5,487	2%

Source: Experian, 2016

6.88 Tunbridge Wells retains 46% of its market share. An explanation for this strong percentage is the strength of the centre; its mix of retailers across the age ranges is excellent; Fenwicks, H&M, LK Bennet, M&S and Gap all trade on the high street or in Royal Victoria Place.

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- 6.89 Royal Victoria Place is the shopping centre within the town centre; it is one of many areas of Tunbridge Wells which has its own shopper identity. Royal Victoria Place has planning permission, granted 6 March 2016, for an extension and refurbishment of the shopping centre an investment of c.£70m which will include an eight screen cinema.
- 6.90 In Tunbridge Wells Aldi are proposing a new store on the edge of the town centre on Eridge Road; community consultation has recently commenced.

### ***Recent Deals and Transactions***

- 6.91 Rents in Sevenoaks are c. £70/75 Zone A. Recent deals on the high street include Sweaty Betty and Barkers. Whilst the A3 restaurant scene is strong in Sevenoaks, fashion retailers are light. M&S have recently moved to their new London Road site in 2013 and that development was the first town centre development for c.25 years. M&S's old premises will be occupied in part by Nando's and it is understood that a planning application has been submitted.
- 6.92 Rents in Tunbridge Wells vary between £70 to £170 Zone A depending on location. Metro Bank paid c. £170 for the new store on Calverley Road for a bespoke store; rents elsewhere on Calverley Road are c. £140 Zone A. Royal Victoria Place shopping centre rents are c. £70 Zone A, however with a scheme extension and improvement in the mix of tenants it is expected that rents will increase through competition for space and due to the proposed new entrance into Calverley Road. It is understood Morrison's has recently closed, with the unit potentially being re-occupied by The Range. announced its store will be closing
- 6.93 The former cinema site at Mount Pleasant is a site of 1.5 acres (0.6 hectares), has been vacant and levelled for two years. The site was purchased by Altitude UK in April 2016.

### ***Review of High Street Floor Space***

- 6.94 Voids are still being seen on the high street in Sevenoaks where voids are running at 6.72%. Voids in Tunbridge Wells are c.13%. The quality of stock in both towns is high, although, as Sevenoaks town centre is linear, the strength of the retail covenants reduces at the extremities of the high street. This is particularly seen at the southern end around the Waitrose, which has suffered since the opening of the Marks and Spencer store, which is en route to the train station. In Tunbridge Wells the covenant strength is excellent, with areas that have a distinct character encouraging dwell times and movement around the town centre.

### Summary

6.95 In summary:

- The employment use markets of Sevenoaks and Tunbridge Wells are well established and have historically satisfied the needs of the local occupiers. There are, however, many challenges that face both occupiers and owners if they are to retain current tenants, who prefer new grade A space and protect owners from deprecating assets in terms of redevelopment of sites for residential.
- Sevenoaks and Tunbridge Wells are popular residential areas for London commuters. When you consider that the average property values in the respective towns are £636,000 and £451,000 as of February 2016, compared with £284,000 for the whole of the UK<sup>83</sup>, it is plausible that current office landlords and developers see the relaxation of PDR as an opportunity.
- A further challenge for Tunbridge Wells and Sevenoaks is the strength of competing regional centres. However, infrastructure improvements, such as those currently being undertaken on the A21 between Tonbridge and Pembury, will enhance the attractiveness of industrial and out of town stock in Tunbridge Wells Borough. There has also been a road improvement on Longfield Road where the North Farm estate is accessed which has improved the employment area and will hopefully be a catalyst for further investment in the area.
- Furthermore, with London and the South East commuter belt to grow in significance, with the capital's population projected to increase to 10 million by 2030, these people will need servicing for goods demand. Additionally, many occupiers such as Amazon have already launched plans to introduce smaller warehouses in and around London to service the increased demand for faster delivery; up to one hour's delivery time currently. There could therefore be an opportunity for existing areas with the Borough or District to cater for smaller industrial and business park units used to service the populations of London and Kent.
- In terms of retail, spend is increasing and retailers are seeing signs of recovering from the effects of the recession. However, the growth of internet shopping increasingly means retail units are becoming show rooms as less physical space is required. The effect of internet shopping growth is that retailers are being specific about the space they take.

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<sup>83</sup> Zoopla (2016)

## 7. Understanding business and stakeholder views

- 7.1 Planning Practice Guidance (PPG) highlights the importance of liaising closely with local stakeholders and the business community to understand their current and potential future needs.
- 7.2 In support of this important Government requirement two stakeholder workshops were held as part of the study process. The workshops provided the study team with the opportunity to present on emerging findings, particularly with regards to the FEMA and baseline, whilst also allowing those in attendance to share their view on the work undertaken to date. They were also used to explore opportunities and constraints that businesses and other key stakeholders felt needed to be addressed in order to ensure that Local Plan employment policies remained responsive to their needs and in turn support the continued sustainable economic growth of the area.
- 7.3 The two events attracted 66 attendees including:
- Council representatives;
  - Neighbouring authorities;
  - Commercial agents;
  - Developers;
  - Landowners;
  - Local businesses and representative groups; and
  - Local education providers.
- 7.4 Each workshop comprised two presentations followed by facilitated group discussions:
- **Discussion 1** sought to obtain feedback on the study scope and approach, and whether stakeholders agreed with the emerging findings. This was followed by consideration of the areas main economic strengths and any perceived weaknesses. Members of each group were also asked to reflect on the key opportunities and drivers of economic growth, as well as the main threats to the economy in the future.
  - **Discussion 2** focussed on key growth sectors and forecast job growth over the plan period. Members of each group were also asked to consider factors that had the potential to influence the scale of growth and comment on any necessary infrastructure or other investment required to achieve the levels of growth envisaged.



The following provides a summary of the key messages arising from these discussions. A more detailed full briefing note summarising the feedback received from each workshop is provided at Appendix 4.

### Stakeholder Workshop Feedback

- 7.5 The Sevenoaks workshop was in Sevenoaks Town on Friday 18 March 2016. A total of 27 people attended the workshop. Table 7.1 below presents a summary SWOT analysis of the local economy arising from discussion 1.

**Table 7.1: Sevenoaks District SWOT Analysis**

Strengths	Weaknesses
Location / proximity to London	Shortage of commercial sites/premises
Transport infrastructure – road and rail	Broadband reliability in rural areas
Quality of place	Green Belt constraints
Highly skilled resident population and workforce	Skills shortages in some sectors
Business base	Age demographic skewed by housing affordability
Opportunities	Threats
Improvements to public transport connectivity	Lack of affordably priced housing
Growth in logistics, energy, renewables, tourism and tech start-ups	Ageing population
New commercial stock in north of District at motorway junctions	Limited supply of land for employment related development
Growing the rural economy	Competition from other areas in Kent
	Access to skills (lower level)

*Source: Turley*

- 7.6 In addition to the above attendees were asked to comment on the scale of forecast employment growth, including the potential for Sevenoaks to create, on average, 445 jobs per year over the period to 2033.
- 7.7 Whilst Sevenoaks (District) was perceived to be well positioned to secure job growth, there was a perceived need for a stronger level of ‘transformational growth’ given competition from neighbouring areas. This level of growth would, however, be contingent on the availability of affordably priced housing and skills retention.
- 7.8 Locations perceived to have growth potential include:
- Fort Halstead, which offers potential to support employment creation in R&D related industries and sectors; and
  - Swanley, capitalising on its strategic location and proximity to south London market to grow logistics related employment.

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- 7.9 It was also indicated that the economic growth potential of Edenbridge and Westerham should also be considered.

### Tunbridge Wells Stakeholder Workshop

- 7.10 The Tunbridge Wells workshop was held in Royal Tunbridge Wells on Wednesday 16<sup>th</sup> March 2016. A total of 39 people attended the event.
- 7.11 Table 7.2 below presents a summary SWOT analysis of the local economy arising from discussion 1.

**Table 7.2: Tunbridge Wells Borough SWOT Analysis**

Strengths	Weaknesses
Quality of place	Transport infrastructure/congestion
Recognised brand	Connectivity to strategic road network
Highly skilled resident population and workforce	Age of commercial property
Proximity to Central London	Broadband in rural areas
Established business networks	Lack of expansion premises/sites
Affordability relative to London markets	Lack of higher education institutions
	Skills retention

Opportunities	Threats
A21 Growth Corridor	Declines in working age population
New connection to A26	Access to skills (lower level)
New land allocations, including sites in the Green Belt	Over-reliance on finance sector
Retention of young people	Businesses meeting needs outside of the Borough
Supporting growth in logistics, creative industries, medical R&D and life-sciences	Further loss of office due to permitted development rights
Digital Infrastructure to support home working	Further loss of younger working people

*Source: Turley*

- 7.12 In addition to the above, attendees were asked to comment on the scale of forecast employment growth, including the potential for Tunbridge Wells to create, on average, 500 jobs per year over the period to 2033. It was generally perceived that the creation of 500 jobs per annum in Tunbridge Wells is achievable but that this level of growth would be subject to:
- **Land and premises availability** – it was noted that the current lack of supply acts as a disincentive to potential investors and is constraining the growth of existing businesses;

- **Labour and skills availability** - to support non-professional service sector roles which will make up a significant proportion of new job opportunities across the Borough as well as employees for lower skilled jobs (this is hindered by high housing costs); and
- **Addressing local transport and congestion issues** - particularly around North Farm and Pembury.

7.13 Locations perceived to have growth potential:

- North Farm/Pembury/A21 Corridor;
- Paddock Wood;
- A228 Corridor;
- Areas near to the Hospital, and
- Land between Kent Academy and Bypass.

### **Additional Stakeholder Consultations**

7.14 The workshops are being supplemented with a series of consultations with other local stakeholders. The study team have held discussion with Locate in Kent and propose a further meeting with the South East Local Enterprise Partnership. The key themes to emerge through the discussion held to date, and which have relevance when considering the qualitative needs of businesses and potential investors, are summarised below:

- Locate in Kent perceive the main issue in Sevenoaks and Tunbridge Wells to be the imbalance between the supply and demand of land and properties. As a result Locate in Kent have fewer properties to recommend to those enquiring and are therefore actively promoting land and property that is more readily available across other Kent locations.
- Whilst Tunbridge Wells is seen as a good office/industrial location, there is less investment demand across Sevenoaks. Notwithstanding this both areas were perceived to benefit from good rail connections to London, despite rail improvements to other areas of Kent arising from the HS1 investment. It was noted that whilst this has shortened journey times the cost of travel is higher.
- It was noted that Tonbridge and Malling is seen by the market as a less favourable place to invest, yet due to land and premises availability has been successful in attracting larger investments particularly at Aylesford and Kings Hill. Amazon recently set up a warehouse in Aylesford. The wider Kent area also remains a popular location for Foreign Direct Investment, particularly within the warehousing sector with recent activity from Aldi, Lidl, Asda.
- A key issue for Sevenoaks and Tunbridge Wells is a lack of higher quality stock. This particularly applies to offices in town centres where there is limited space and

old stock. It was noted that permitted development rights, and office to residential conversions continue to impact on the available supply.

- Locate in Kent noted that West Kent's property offer for small businesses is limited. The main areas of focus include the East Malling Research Centre, which has a horticulture focus (food R&D), and Discovery Park outside of the area. In view of this there was a perceived need for more incubator/start up space (as well as move on space) across both areas. For example, Churchill Square at Kings Hill operates at a 4% vacancy rate, indicating high demand in West Kent.
- It was noted that some Local Authorities are starting to deliver incubator/start up space within their Council buildings (e.g. Maidstone). A key requirement is for these spaces to be flexible to allow for the changing size of business as they grow. The current offer at Maidstone provides space for up to c.6 employees per business. Providing flexible space to accommodate employees above this will ensure the space can support a business as it grows, particularly in areas such as Sevenoaks and Tunbridge Wells where move on space is limited.

### **Key issues arising from the stakeholder engagement process**

7.15 A number of common themes and issues emerged from the workshops. The following are of particular note to the consideration of future economic needs across both areas:

- **An attractive business location.** The availability of a highly skilled workforce and the attractiveness of the area as a place to live were highlighted as key selling points which make Sevenoaks and Tunbridge Wells' an attractive business location. It was also felt that businesses in the area benefited from established and supportive business networks, thereby supporting business creation and survival.
- **Varied opportunities for growth.** There are perceived to be opportunities for growth across a range of sectors including professional and businesses services, but also creative industries, information and communication technologies (in particular tech start-ups). Growth in construction and health care services were also acknowledged, and the areas potential to support employment life-sciences / medical R&D. The diversity of the sectoral opportunities means that there are growth opportunities for both Sevenoaks and Tunbridge Wells.
- **The role of the rural economy.** It was noted that the importance of rural areas as employment centres should not be overlooked when considering future growth prospects. While employment is largely concentrated in urban centres, rural areas were noted as providing opportunities for farm diversification, with scope to support growth of renewable industries in particular.
- **Lack of land and premises availability.** Whilst the area remains an attractive business location with good prospects for growth, it was felt that the local planning system needed to be more responsive to facilitate business growth and expansion. A key issue highlighted was the lack of available land and premises with stakeholders suggesting more land in both areas needed to be allocated to avoid the relocation of strategic employers to other areas where their land and property needs can be better served.

- **Transport infrastructure and congestion.** Transport and accessibility were consistently reported as key barriers to growth, particularly in town centres and around industrial parks in Tunbridge Wells. Despite improvements businesses noted that congestion remains an issue.
- **Digital connectivity in rural areas.** Broadband availability and reliability in rural areas was consistently raised as an issue across both areas. Whilst rural areas tend to be difficult to serve due to distances from telephone exchanges, in the context of increased levels of home-working and a need to support rural employment, it was felt that further investment was necessary to improve the speed and quality of internet connection. The continued roll-out of high speed fibre optic broadband across Kent has the potential to extend coverage to rural areas across Sevenoaks and Tunbridge Wells, thereby improving accessibility for rural based businesses.
- **Addressing skills requirements and gaps.** While businesses in attendance did not identify any specific skills gaps, concern was raised regarding the availability of skills locally to support growth in the service sector and demand arising from lower order occupations. Unmet demand from vocational sub-sectors was considered to be a threat to the local economy. It was suggested that more needed to be done to retain younger working age residents through the provision of apprenticeships and other training initiatives. Other proposed measures included creating stronger links between businesses and local education providers.

7.16 Although not all of these issues can be addressed through employment policies within the Local Plan, they provide an important context for future investment planning, economic development strategy and business and stakeholder engagement more generally.

## 8. Demand Assessment

8.1 Having considered the performance of the local economy, operation of the commercial property market and needs of businesses, this section turns to consider future economic development needs and land requirements across Sevenoaks.

8.2 The PPG notes that:

*'assessing development needs should be proportionate and does not require local councils to consider purely hypothetical future scenarios, only future scenarios that could be reasonably expected to occur'<sup>84</sup>.*

8.3 Within this context, plan makers should consider:

- Sectoral and employment forecasts and projections (labour demand);
- Demographically derived assessments of future employment needs (labour supply techniques);
- Analysis based on the past take-up of employment land and property and/or future property market requirements; and
- Consultation with relevant organisations, studies of business trends, and monitoring of business, economic and employment statistics<sup>85</sup>.

8.4 These different approaches are explored in more detail below. The focus is on developing and testing a number of scenarios which can be used to assess economic needs and land requirements over the period from 2013 to 2033/35.

8.5 It should be noted that the analysis within this section relates solely to Sevenoaks District, drawing on the joint baseline and stakeholder consultation exercises - presented within sections 2-7 of this report - where appropriate.

### Overview of the different approaches

#### Labour Demand

8.6 Sectoral and employment forecasts and projections have been used to anticipate the extent of future employment across Sevenoaks. The purpose of introducing the employment forecasts is to consider potential growth in both workforce and full time equivalent employment to enable an estimation of potential future floorspace and land requirements. This approach requires that future employment forecasts be broken down to a sectoral level, and then these sector level forecasts be matched, as far as possible, to different types of employment premises and land.

8.7 Oxford Economics' 2014 East of England Forecasting Model (EEFM) has been used to provide a starting point for understanding potential future job creation in Sevenoaks and

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<sup>84</sup> 004 Reference ID: 2a-004-20140306, revision date 06.03.2014

<sup>85</sup> 033 Reference ID: 2a-033-20140306, revision date 06.03.2014

Tunbridge Wells. These local forecasts are derived from and consistent with Oxford Economics' world, UK national and UK regional forecasts, and reflect areas' historic specialisms in particular sectors to provide an unconstrained view of future change in economic, labour market and demographic factors which could be expected if historic trends continue<sup>86</sup>. EEFM forecasts are used by a number of public sector bodies, and are produced for authorities in the East of England as well as selected authorities in the East Midlands and South East to allow for LEP aggregation.

- 8.8 EEFM forecasts rely heavily on published data, and are based on past observed trends which reflect historic infrastructure and policy environments. The local concentration of each sector is compared to the regional profile – with consideration of change over time – and used as the basis to forecast how the sector may perform in the future. A number of labour market and demographic factors are applied to the sector forecast to estimate jobs and employment.
- 8.9 The Sevenoaks and Tunbridge Wells Strategic Housing Market Assessment (SHMA) considers both the 2013 and 2014 EEFM datasets<sup>87</sup>, but acknowledges that further consideration will be given to likely future economic performance and scale of jobs growth through the preparation of this study. This report therefore focuses solely on the 2014 EEFM, given that this represents the most up-to-date forecast published by Oxford Economics.
- 8.10 Consideration is also given to the requirement for adjustments to be made to the baseline forecasts in response to consultation with stakeholders and businesses and known major projects and investments that are in the pipeline and likely to come forward over the plan period.
- 8.11 The analysis is based on the period from 2013 to 2033, and onwards to 2035 to reflect the potential Local Plan period. It is important to note that the EEFM runs only to 2031, and therefore an estimate to 2033 and 2035 has been made based on an extrapolation of the absolute annual growth over the last five years of the forecast (2026-2031). This is consistent with the approach used in the SHMA.

### **Labour Supply**

- 8.12 The second approach to calculating future employment needs and land requirements is based on an assessment of labour supply. This approach allows for an estimation of the number of workers expected to be employed in Sevenoaks over the period from 2013 to 2035, and in turn allow for an estimation of future land requirements.
- 8.13 The SHMA concludes that there is an objectively assessed need (OAN) for 620 dwellings per annum in Sevenoaks. The OAN for Sevenoaks is uplifted slightly from a demographically-derived position in order to grow the labour force and support the level of job growth forecast in the District under the 2014 EEFM. A comparable adjustment is not made for Tunbridge Wells, reflecting the scale of job growth forecast under the 2014 EEFM relative to historic trends. It is, however, noted that the level of job growth forecast under the 2013 EEFM can be supported by an adjusted demographic scenario which

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<sup>86</sup> Oxford Economics (2015) East of England Forecasting Model – Technical Report

<sup>87</sup> GL Hearn (2015) Sevenoaks and Tunbridge Wells Strategic Housing Market Assessment

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assumes a return to slightly higher levels of net in-migration of people from London. This demographic scenario therefore underpins the recommended OAN for Tunbridge Wells, and is also described as the most '*appropriate trend-based demographic projection*' for both authorities<sup>88</sup>.

- 8.14 On this basis – with the PPG stating that a demographically derived assessment of employment needs should be undertaken in understanding future development needs<sup>89</sup> – the 'London adjusted' projection is considered the most appropriate demographic labour supply scenario for the purposes of this study. Outputs relating to population and labour force modelling have been sourced from GL Hearn to inform the analysis.

### **Past Take Up**

- 8.15 The third and final approach considered is the past take up approach. The Councils' monitoring data provides details of the scale of completed employment related development across each local authority area over recent years. Data is available to cover the period from 2008/09. Whilst past development rates are subject to a degree of volatility, and cannot be relied upon in isolation, extrapolating these forward provides a useful proxy for considering future levels of demand for different types of employment floorspace. It also provides a benchmark against which to compare the requirements generated under the Labour Demand and Labour Supply Scenarios.

### **Consultation and Monitoring Trends**

- 8.16 Though this in itself is not a specific scenario for consideration, the previous baseline, stakeholder consultation and review of market signals is used to inform the formation of the above approaches and to reflect on their appropriateness.

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<sup>88</sup> GL Hearn (2015) Sevenoaks and Tunbridge Wells Strategic Housing Market Assessment (para 9.10)

<sup>89</sup> 033 Reference ID: 2a-033-20140306, revision date 06.03.2014

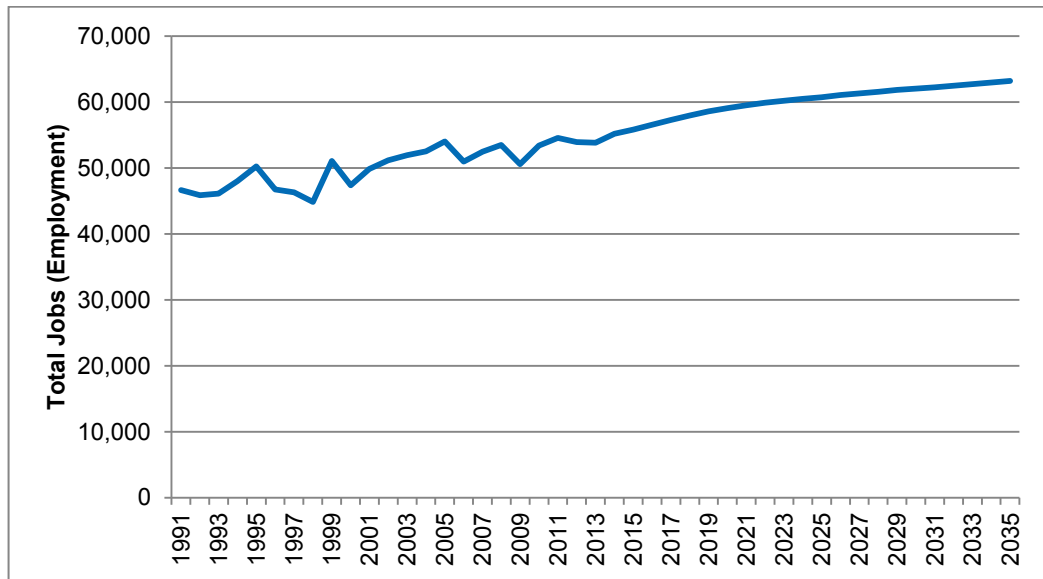


**1. Labour Demand**

**EEFM Baseline Scenario**

8.17 In 2013, EEFM data indicates that there were a total of 58,823 jobs in Sevenoaks, with total employment forecast to grow by 8,880 jobs over the period to 2033. This increases to 9,358 jobs over the period from 2013 to 2035. The following graph shows the profile of job creation forecast in the District over this period.

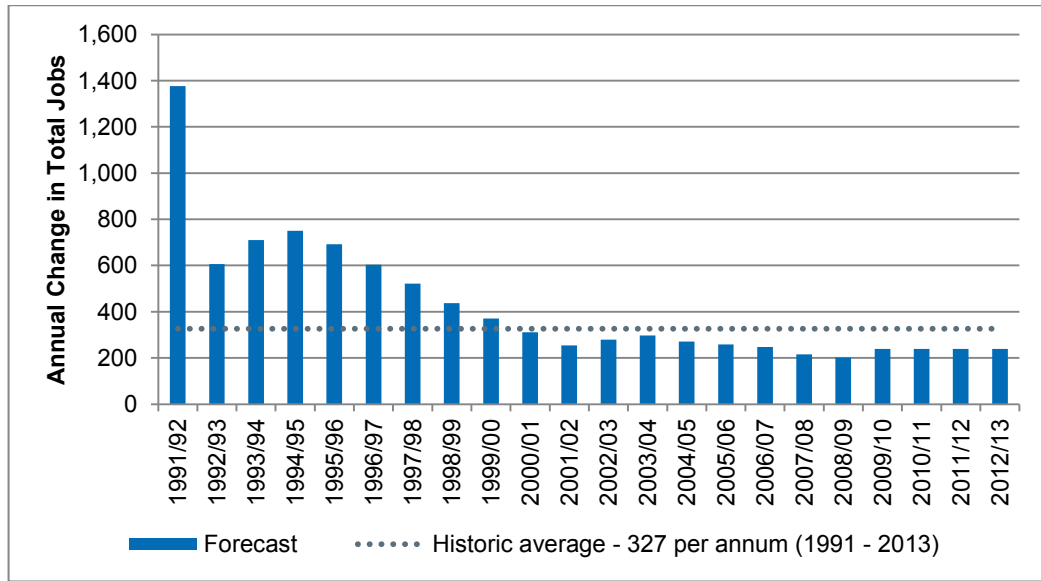
**Figure 8.1: Forecast Change in Employment 2013 – 2035**



Source: EEFM, 2014

8.18 Growth of this scale would result in the annual creation of 444 jobs in Sevenoaks over the period to 2033, falling slightly to 425 jobs per annum over the longer term period to 2035. As shown in the following graph, the greatest growth is expected to occur early in the forecast period, with job creation surpassing historic levels over the next decade.

**Figure 8.2: Forecast Annual Change in Total Employment 2013 – 33**



Source: EEFM, 2014

***Change in Employment by Sector***

- 8.19 The total jobs growth results from projected growth in some sectors and decline in others. Table 8.1 shows forecast change in total jobs, broken down by industrial sector over the period to 2033 and 2035.

**Table 8.1: Forecast Change in Employment by Sector 2013 – 33 (Absolute change in number of jobs)**

	2013 – 18	2018 – 23	2023 – 28	2028 – 33	2013 – 33	2013 – 35
Agriculture	1	-63	-50	-47	<b>-159</b>	-178
Mining & quarrying	-9	-10	-8	-7	<b>-34</b>	-36
Manufacturing - food	2	-5	-8	-9	<b>-19</b>	-22
Manufacturing - general	36	-15	-41	-41	<b>-61</b>	-78
Manufacturing - chemicals only	-14	-30	-35	-33	<b>-113</b>	-126
Manufacturing - pharmaceuticals	0	0	0	0	<b>0</b>	0
Manufacturing - metals	-11	-22	-26	-24	<b>-83</b>	-93
Manufacturing - transport equipment	44	15	-2	-5	<b>52</b>	50
Manufacturing - electronics	-2	-13	-17	-16	<b>-49</b>	-56
Utilities	-11	-16	-14	-14	<b>-54</b>	-60
Waste & remediation	1	-1	0	-1	<b>-1</b>	-2
Construction	643	474	381	346	<b>1,843</b>	1,984
Wholesale	40	-10	-68	-81	<b>-119</b>	-150
Retail	163	89	-2	-26	<b>224</b>	216
Land transport	96	23	-6	-13	<b>100</b>	95
Water & air transport	12	8	7	7	<b>35</b>	38
	2013 – 18	2018 – 23	2023 – 28	2028 – 33	2013 – 33	2013 – 35

Accommodation & food services	231	71	10	-5	<b>306</b>	306
Publishing & broadcasting	37	-34	-64	-61	<b>-123</b>	-148
Telecoms	108	67	47	52	<b>275</b>	295
Computer related activity	152	93	65	57	<b>368</b>	392
Finance	20	39	35	28	<b>121</b>	133
Real estate	350	242	241	226	<b>1,060</b>	1,151
Professional services	811	434	281	234	<b>1,760</b>	1,857
Research & development	201	70	40	32	<b>343</b>	356
Business services	476	311	184	165	<b>1,135</b>	1,203
Employment activities	264	164	84	70	<b>582</b>	611
Public administration	-120	-42	-37	-39	<b>-239</b>	-254
Education	89	147	190	194	<b>620</b>	697
Health & care	46	109	112	108	<b>376</b>	419
Arts & entertainment	334	135	95	81	<b>645</b>	680
Other services	143	10	-28	-36	<b>89</b>	76
<b>Total</b>	<b>4,133</b>	<b>2,243</b>	<b>1,363</b>	<b>1,142</b>	<b>8,880</b>	<b>9,358</b>
% of overall growth forecast	47%	25%	15%	13%	—	—

Source: EEFM, 2014

- 8.20 In Sevenoaks, significant job creation is forecast in the construction sector, with professional services, real estate and business services also expected to drive growth. A decline is forecast in public administration early in the forecast period, with a fall in the number of jobs in manufacturing, agriculture, publishing and broadcasting also envisaged.
- 8.21 Job creation can also be considered proportionately, Table 8.2 identifies the sectors forecast to see the greatest proportionate growth and decline in Sevenoaks. This should however be treated with caution as large proportionate changes may be as a result of a small base and therefore represent small absolute change.

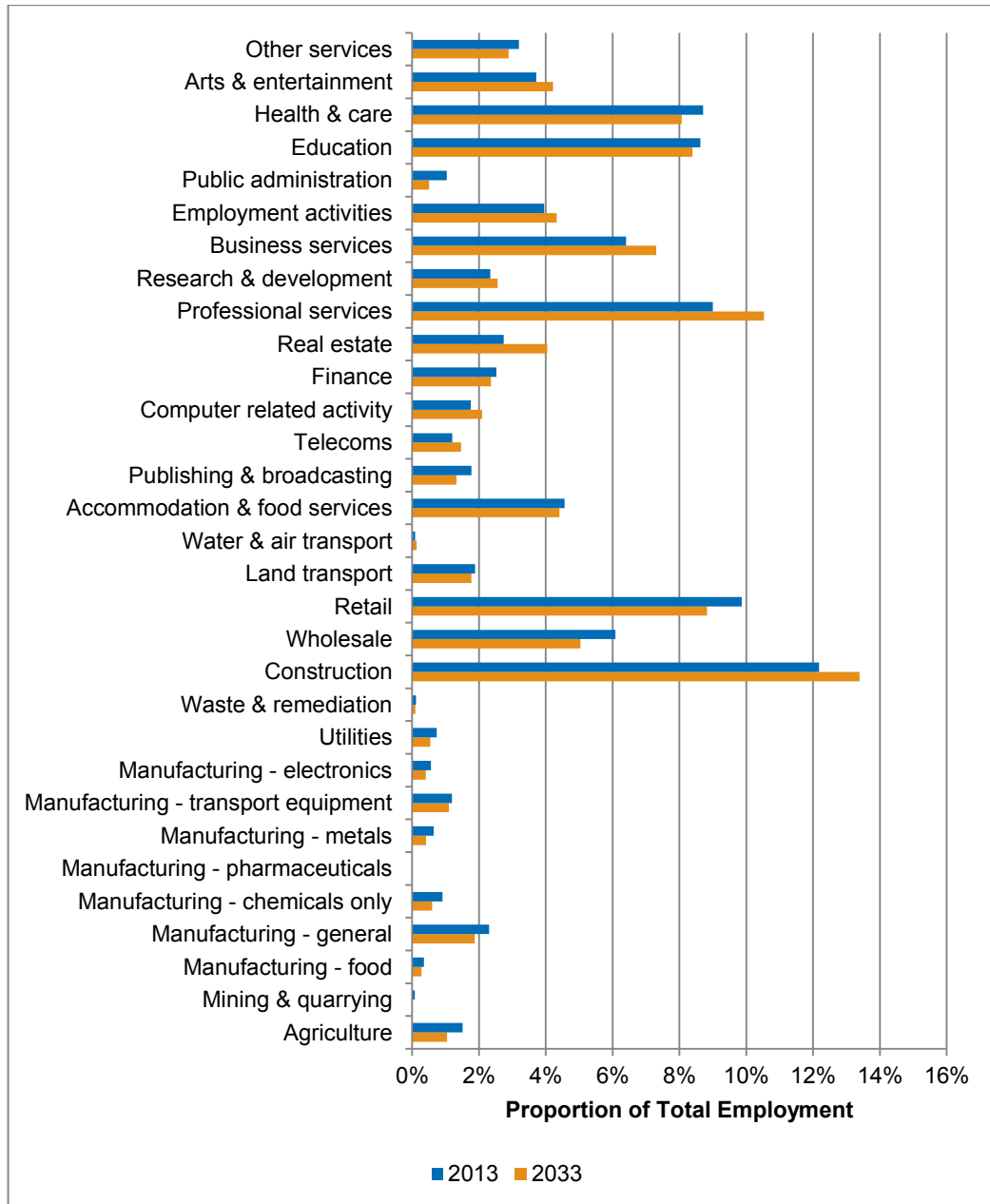
**Table 8.2: Forecast Proportionate Change in Employment by Sector 2013 – 33**

Strongest Forecast Growth			Strongest Forecast Decline		
Sector	Total	%	Sector	Total	%
Water and air transport	35	75%	Mining and quarrying	-34	-77%
Real estate	1,060	72%	Public administration	-239	-40%
Telecoms	275	43%	Manufacturing – metals	-83	-24%
Computer related activity	368	39%	Manufacturing – chemicals	-113	-23%
Professional services	1,760	36%	Agriculture	-159	-20%

Source: EEFM, 2014

- 8.22 In Sevenoaks, water and air transport is forecast to see the greatest proportionate growth in jobs, although the absolute scale of growth is small. Growth in real estate is more marked in this respect, while the forecast growth in professional services will lead to a sizeable proportionate growth in this sector. Conversely, the decline in public administration will lead to a 40% fall in the number of jobs in this sector in Sevenoaks, with smaller sectors – such as mining, quarrying, agriculture and specialist manufacturing – also forecast to shrink in size.
- 8.23 As a result of the forecast changes summarised above, the sectorial employment profile of Sevenoaks is expected to alter, with a greater representation of those sectors projected to grow and a lower representation of those projected to decline. This is shown in Figure 8.3.

Figure 8.3: Sevenoaks Employment Profile by Sector 2013 – 33



Source: EEFM, 2014

8.24 The construction sector<sup>90</sup> is currently the largest employer in Sevenoaks, and this is forecast to grow through the creation of new jobs in the sector. Professional services are also expected to grow to represent a greater proportion of all jobs in the District by 2033. In contrast, retail and wholesale are forecast to play a smaller proportionate role.

<sup>90</sup> Includes people employed in construction activities (construction of buildings, civil engineering and specialised construction activities) by businesses located in Sevenoaks.

**Considering the Need for Adjustments**

- 8.25 As identified earlier in this section, it is important to consider whether adjustments to the baseline scenario are necessary to reflect known major projects and investments that are likely to come forward over the plan period.
- 8.26 A review of extant planning permissions and liaison with the Council has not identified any major strategic employment sites in the District which would require an adjustment to the baseline scenario. Fort Halstead is the largest outstanding employment consent, and will provide up to 27,000sqm of office and industrial floorspace. Whilst this can provide new employment space for local jobs, the Council has confirmed that there is no net increase in jobs expected at the site, with newly created jobs replacing those lost through the withdrawal of DSTL. This would therefore have a net nil effect on the baseline scenario.
- 8.27 Major developments outside of the FEMA may also have an effect on the baseline, with the planned development of Ebbsfleet Garden City expected to include over 11,000 new homes, 250,000 sq m of retail, hotel and leisure space and around 650,000 sq m of new employment floorspace<sup>91</sup>. Once developed, Ebbsfleet Garden City could compete with Sevenoaks for office and logistics occupiers, particularly given the area's connectivity on the HS1 rail line and adjacency to the River Thames. The scale of residential development will also generate a significant growth in labour force, many of which are likely to benefit from the parallel job creation planned.
- 8.28 Paramount London is a further planned development on the Swanscombe peninsula, which is currently being progressed through the Nationally Significant Infrastructure Project (NSIP) process. Early consultation material<sup>92</sup> suggests that up to 27,000 skilled or semi-skilled full-time jobs could be generated upon opening in 2021, inclusive of jobs created on site – at the Entertainment Resort and surrounding hotels – and further indirect jobs potentially generated through the supply chain and increased spending in the local area. This development could draw creative industries, whilst generating supply chain opportunities which Sevenoaks may be positioned to exploit.
- 8.29 It is also important to understand the potential implications of ongoing transport investment, particularly in light of strategic plans to improve transport connectivity and unlock new growth opportunities across the South East, outlined in section 3 of this report.
- 8.30 As noted above, HS1 is one such historic investment which has substantially improved the connectivity of Ebbsfleet and Ashford by providing a direct link to St Pancras, Stratford and Europe. These areas therefore possess a competitive advantage over Sevenoaks for prospective business occupiers, particularly for office based sectors which benefit from high speed rail links. HS1 could therefore be seen to have a negative effect on office-based sectors in Sevenoaks, although given that this investment has already been made and is in operation, it is considered that economic drivers associated with HS1 are likely to have already influenced historic trends and therefore future forecasts.

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<sup>91</sup> AECOM (2015) Ebbsfleet Garden City Development Report

<sup>92</sup> Sourced from London Paramount website – <http://londonparamount.info>

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- 8.31 The Lower Thames Crossing could also have a significant effect on the regional economy. Congestion at the existing Dartford Crossing is seen as a major restriction on the development and growth of the region, impacting upon productivity and constraining business opportunities. A business survey cited in recent consultation documents<sup>93</sup> indicates that nearly three quarters of businesses felt that congestion affects their business, with almost half suggesting that they would employ more people if the congestion problem was addressed.
- 8.32 Highways England recently consulted on route options, with a new crossing directly linking the M2 and M25 the preferred option. This would link Ebbsfleet, Swanscombe and Gravesend with Tilbury and wider areas of Thurrock, creating over 5,000 new jobs and yielding a significant economic benefit. A new crossing remains at an early stage of development, however, with an expected opening of 2025 – 2027 depending on the availability of public financing. In relieving congestion across the region, the Lower Thames Crossing could have a positive effect on logistics operators in Sevenoaks, although this benefit would be long-term and unlikely to be realised until towards the end of the plan period. On this basis, this investment is therefore unlikely to have a significant measurable effect in Sevenoaks which can be realistically modelled at the current point in time.
- 8.33 There is also a recognised need to expand airport capacity in the South East through the provision of a new runway at Heathrow Airport or Gatwick Airport. The Airports Commission identified that each of the options considered would generate significant additional employment in the local area, including jobs on site as well as indirect and induced jobs generated through the supply chain and onward expenditure<sup>94</sup>. The expansion of Gatwick would be more likely to influence Sevenoaks and Tunbridge Wells given its more proximate geography, although it is noted that:
- “The number of jobs predicted as a result of expansion at Gatwick are lower, although still significant, and take longer to build up. This reflects both Gatwick’s different business model, which has a higher proportion of low-cost carriers and less transfer traffic, and hence requires a smaller number of staff per passenger, and also the slower rate at which demand increase at the airport following expansion*
- “These employment impacts would be felt in an area of comparatively low unemployment, although they would be of material benefit to Crawley, which supplies the largest single proportion of the airport’s workforce and has higher unemployment than the surrounding region, and to other areas with transport links to the airport such as Croydon”<sup>95</sup>*
- 8.34 The Commission unanimously concluded that the case for a new runway to the north-west of Heathrow was the strongest of the options considered, This will inform the Government’s decision on which option to progress, which is expected in Autumn 2016. Expansion at Gatwick would deviate from the recommendations of the Commission, and – even if progressed – the precise impact of the expansion on the economy of

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<sup>93</sup> Highways England (2016) Lower Thames Crossing – Summary Business Case

<sup>94</sup> Airports Commission (2015) Final Report

<sup>95</sup> Ibid (para 7.36 – 7.37)



Sevenoaks and Tunbridge Wells is unknown. This effect would be unlikely to be realised before 2025<sup>96</sup>.

- 8.35 Collectively, consideration of these projects and investments has identified no short-term significant factors which would necessitate adjustment to the baseline forecasts produced by EEFM at this point in time.

### **Future Employment Land Needs**

- 8.36 With a baseline scenario of employment growth established, the implications for floorspace and land requirements over the period to 2033, and beyond to 2035 can be considered. This is based on full-time equivalent (FTE) employment, converted into floorspace using employment densities and then land using a plot ratio.

- 8.37 This reflects the guidance in the PPG<sup>97</sup>, which identifies the four key relationships in translating employment outputs into land requirements:

- **Standard Industrial Classifications (SIC) sectors to use classes.** This is achieved by assigning jobs to land use categories, including those likely to occur in B and non-B use classes.
- **SIC sectors to types of property.** This is an estimate of the proportion of employment that is likely to take place in each of the property sub-sectors, namely office, research and development (B1a/b), industrial (B1c/B2) and warehousing and distribution (B8).
- **Employment to floorspace using employment density.** This involves the conversion of employment to floorspace (sqm), using employment densities derived from the HCA's Employment Density Guide<sup>98</sup>.
- **Floorspace to site area using plot ratio.** The final step involves the application of standard plot ratio assumptions to convert estimates for floorspace into estimates for net developable land.

- 8.38 Turley has an established employment land calculator that is used to estimate economic demand and convert to land requirements, in line with the methodology above. It has been reviewed to ensure alignment with the Sevenoaks and Tunbridge Wells employment and business base. Although this report only deals with the results for Sevenoaks, it is important to note that this has been applied consistently across both Sevenoaks and Tunbridge Wells in order to provide an indication of the employment land required to support forecast job creation in each authority and across the combined area.

### ***Forecast Changes in FTE Employment***

- 8.39 While the analysis earlier in this section considered change in total employment, Oxford Economics also publish FTE forecasts which correspond with the EEFM and can be used to inform assessments of employment land requirements. This indicates that the

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<sup>96</sup> Letter from Sir Rory McNulty to the Prime Minister (6 June 2016)

<sup>97</sup> 034 Reference ID:2a-034-20140306, revision date 06.03.2014

<sup>98</sup> HCA (2015) Employment Density Guide, 3<sup>rd</sup> edition

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creation of 8,880 jobs in Sevenoaks over the period from 2013 to 2033 is equivalent to 8,167 FTE jobs, increasing to 8,603 FTE jobs over the period to 2035. This is broken down by sector in the Table 8.3.

**Table 8.3: Forecast Change in FTE Employment by Sector in Sevenoaks (Absolute change in number of jobs)**

Sector	2013 - 33	2013 - 35	Sector	2013 - 35	2013 - 35
Agriculture	-154	-173	Hotels and restaurants	274	275
Mining and quarrying	-33	-36	Publishing and broadcasting	-116	-140
Food manufacturing	-18	-21	Telecoms	272	292
General manufacturing	-57	-73	Computer related activity	355	378
Chemicals exc pharma	-109	-122	Finance	112	123
Pharmaceuticals	0	0	Real estate	939	1,020
Metals manufacturing	-80	-90	Professional services	1,632	1,722
Transport equipment, machinery & equipment	51	50	Research and development	334	346
Electronics	-47	-54	Business services	1,036	1,099
Utilities	-54	-60	Employment activities	570	599
Waste and remediation	-1	-2	Public administration	-221	-235
Construction	1,734	1,867	Education	546	614
Wholesale	-114	-144	Health and care	363	404
Retail	194	187	Arts and entertainment	556	585
Land transport	90	86	Other services	83	71
Water and air transport	32	34	<b>Total FTE Employment</b>	<b>8,167</b>	<b>8,603</b>

Source: EEFM, 2014

***SIC sectors to Use Classes and Type of Premises Required***

- 8.40 For the purposes of this study, only activities requiring employment space in B class uses generate a need for employment land, and not all additional jobs will be associated with such activities. On this basis, the net amount of FTE employment growth expected to occur in B class employment sectors needs to be calculated.
- 8.41 This is achieved by assigning jobs to land use categories, identifying those likely to require space in B class uses and those which will generate a need for non-B floorspace. The assumptions applied are set out in Appendix 5 of this report.
- 8.42 Once assumptions are applied for individual sectors and aggregated to provide a profile of future change in Sevenoaks as a whole, this indicates that just under half (46%) of additional FTE jobs forecast in the District will require office, industrial or warehouse space. The majority of jobs forecast under this scenario will require office space, with a smaller need for warehousing space and a reduced need for industrial premises.

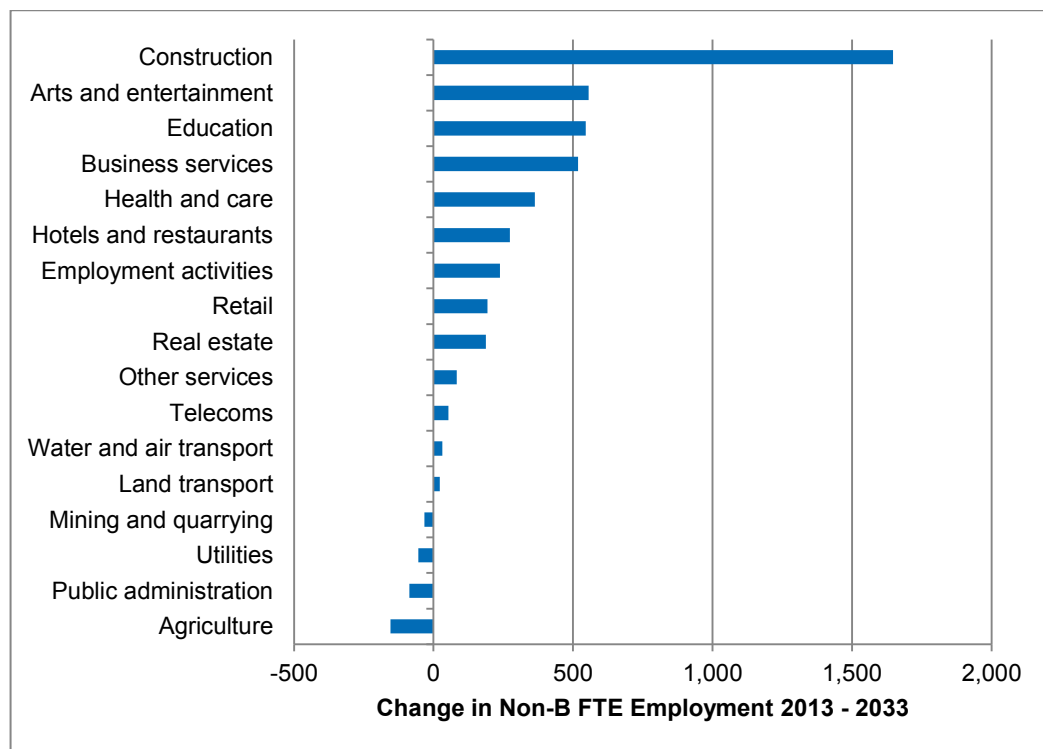
**Table 8.4: Change in B Use Class FTE Employment**

Type	Use Class	2013 – 2033	2013 – 2035
Office	B1a/b	3,725	3,946
Industrial	B1c/B2	-85	-131
Warehouse	B8	139	120
<b>Total B</b>	<b>B1/B2/B8</b>	<b>3,778</b>	<b>3,935</b>
Non-B	Other	4,388	4,667
<b>Total FTE Jobs</b>		<b>8,167</b>	<b>8,603</b>

Source: EEFM, 2014; Turley, 2016

- 8.43 This assessment considers the need for employment space in B class uses, although for completeness Figure 8.4 identifies those sectors expected to see a change in employment which will impact upon the need for non-B premises. This is presented based on FTE employment over the period from 2013 to 2033, with no conversion into land or employment space.

**Figure 8.4: Change in Non-B FTE Employment by Sector**



Source: EEFM, 2014; Turley, 2016

8.44 Based on the assumptions applied, construction represents the main sector where employment growth is not assumed to directly generate a need for employment premises, beyond an allowance for some storage space in use class B8. It is advisable for the Council to consider how forecast change in the sectors presented can be accommodated through the development of policy and allocation of land/sites to meet this need. This should draw upon available modelling and datasets, including projections of pupil demand and future healthcare strategies for example.

***Converting Employment to Floorspace and Land***

8.45 The next step converts employment to floorspace through application of an employment density, before converting to land using a plot ratio.

8.46 Employment densities are derived from the HCA Employment Density Guide<sup>99</sup>, which estimates the amount of floorspace (sqm) per FTE employee in various types of business premises. Published densities for office, industrial and warehouse premises have been respectively averaged as follows to reflect variation amongst different occupiers:

- **Office** – general office (corporate; professional services; public sector; technology, media and telecoms; finance and insurance), call centres;
- **Industrial** – light industrial, industrial and manufacturing; and

<sup>99</sup> HCA (2015) Employment Density Guide, 3<sup>rd</sup> edition

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- **Warehouse** – national distribution centre, regional distribution centre, ‘final mile’ distribution centre.

8.47 It is considered appropriate to apply a higher employment density for research and development given the scale of difference with offices, its specific identification within the EEFM forecasts and the relative prevalence of the industry in Sevenoaks.

8.48 For consistency, this has been converted to gross external area (GEA), which provides the most appropriate basis for calculating land requirements through the planning process<sup>100</sup>.

**Table 8.5: Employment Densities (sqm GEA per FTE)**

B1a/b	B1c/B2	B8	
Office	R&D	Industrial	Warehouse
13.3sqm	55.1sqm	44.8sqm	73.5sqm

Source: HCA, 2015; Turley, 2016

8.49 Applying these assumptions to the baseline EEFM forecasts provides an estimate for the amount of employment floorspace required. This indicates that there will be the greatest need for office floorspace in Sevenoaks over the period assessed, reflecting the type of jobs expected to be created. There will also be a need for warehouse space, with an implied surplus of industrial space relative to the baseline employment scenario.

**Table 8.6: Forecast Change in B Class Employment Floorspace (sqm GEA)**

Type	Use Class	2013 – 2033	2013 – 2035
Office	B1a/b	63,435sqm	66,906sqm
Industrial	B1c/B2	-3,822sqm	-5,848sqm
Warehouse	B8	10,194sqm	8,841sqm
<b>Total B</b>	<b>B1/B2/B8</b>	<b>69,808sqm</b>	<b>69,899sqm</b>

Source: EEFM, 2014; HCA, 2015; Turley, 2016

8.50 Finally, this can be converted to land through the application of plot ratio assumptions, which allow for how land is developed for different uses. A plot ratio of 1.5 is applied for office premises, reflecting likely multi-storey development. This is consistent with the Council’s earlier employment land evidence<sup>101</sup>, while the applied ratio of 0.4 for industrial and warehouse premises also broadly aligns with earlier studies.

8.51 Table 8.7 below sets out the expected future demand for employment land in B class uses in Sevenoaks, following application of plot ratios. This indicates that baseline

<sup>100</sup> For offices, 5% uplift to convert net internal area (NIA) to gross internal area (GIA), and further 5% uplift to convert GIA to gross external area (GEA). For industrial, 5% uplift to convert NIA to GIA, and further 5% uplift to convert GIA to GEA. No conversion necessary for warehouse given publication of employment density on GEA basis

<sup>101</sup> URS (2011) Sevenoaks Employment Land Review

growth could be accommodated through provision of 5.8ha of additional employment land over the period to 2033, with the greatest need for land suitable for warehousing and particularly office premises.

**Table 8.7: Forecast Change in B Class Employment Land (ha)**

Type	Use Class	2013 – 2033	2013 – 2035
Office	B1a/b	4.2ha	4.5ha
Industrial	B1c/B2	-1.0ha	-1.5ha
Warehouse	B8	2.5ha	2.2ha
<b>Total B</b>	<b>B1/B2/B8</b>	<b>5.8ha</b>	<b>5.2ha</b>

Source: EEFM, 2014; HCA, 2015; Turley, 2016

## 2. Labour Supply

- 8.52 The SHMA recommends an appropriate trend-based demographic projection which can be used to understand the demographically derived need for employment in Sevenoaks. This allows for an increased net in-migration from London, to reflect the minor recessionary effect of reduced net migration from the capital. This scenario would grow the population of Sevenoaks by 19,899 over the period from 2013 to 2033, although it is important to note that the housing OAN for the District allows for a higher level of population growth in order to grow the labour force and support the 2014 EEFM forecasts for Sevenoaks. Meeting the OAN in full, therefore, would generate a demand for labour – and employment land – which aligns with the labour demand scenario presented earlier in this section.
- 8.53 Modelling provided by GL Hearn to inform this study suggests that population growth of this scale would lead to an increase of 8,677 in the number of Sevenoaks residents working. Allowing for commuting and converting to FTE<sup>102</sup>, this suggests that there will be a need for 7,205 additional FTE jobs in the District by 2033 to meet the demographically derived need for employment, increasing to 7,922 FTE jobs for the period to 2035. This is a slightly lower level of job growth in the District than implied within the Labour Demand scenario, although it is again important to recognise that not all FTE jobs will require commercial floorspace in B class uses.
- 8.54 This modelling output is not broken down by industry, and it is therefore necessary to apply an assumption to estimate the types of jobs required to meet this demographic need. The proportionate split of employment by sector within the 2014 EEFM for Sevenoaks in 2033 and 2035 has been established and applied to the 7,205 and 7,922 additional jobs supported in each year respectively. Implied change in the number of people working in each sector over the period from 2013 has subsequently been calculated.

<sup>102</sup> Based on forecast relationship between total employment and FTE employment in 2033/2035 in 2014 EEFM

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- 8.55 The implications for floorspace and employment land can be estimated by following a consistent methodology to that applied in the Labour Demand scenario to enable comparison. This is presented in the following table, and indicates that the growth in office-based employment would generate the greatest need for additional employment land. Modest forecast growth in warehouse employment is also expected to generate a small requirement for additional land, although this is largely offset by a forecast decline in the need for industrial land.

**Table 8.8: Employment Land Required – Labour Supply scenario**

	Office	Industrial	Warehouse	Total B	Non-B
<b>2013 – 2033</b>					
FTE jobs	3,410	-137	86	<b>7,205</b>	3,846
Floorspace (sqm)	58,010	-6,133	6,356	<b>58,233</b>	–
Land required (ha)	3.9	-1.5	1.6	<b>3.9</b>	–
<b>2013 – 2035</b>					
FTE jobs	3,705	-157	89	<b>7,922</b>	4,285
Floorspace (sqm)	62,794	-7,053	6,541	<b>62,281</b>	–
Land required (ha)	4.2	-1.8	1.6	<b>4.1</b>	–

Source: GL Hearn, 2015; EEFM, 2014; HCA, 2015; Turley, 2016



### 3. Past Take Up

8.56 The third and final approach considered is the past take up approach. Sevenoaks District Council’s monitoring data provides details of the scale of completed employment related development in the District over recent years. Data is available to cover the period from 2008/09 to 2014/15. A summary of completed floorspace over this period set out in Table 8.9.

**Table 8.9: Completed Floorspace 2008/9 and 2014/15 (sq m)**

Use Class	Floorspace completed (sq m)	Per annum (sq m)	% of Total
B1a	5,789	827	25.2%
B1b	106	15.1	0.5%
B1c	2,926	418	12.7%
B2	2,401	343	10.4%
B8	6,032	861.7	26.2%
B1-8 mixed	5,759	822.7	25.0%
<b>Total</b>	<b>23,013</b>	<b>3,287.60</b>	<b>100%</b>

Source: Sevenoaks District Council

8.57 The table shows that since 2008/09 approximately 23,000 sq m of employment floorspace has been completed across the District. Around a quarter (25.2%) has been for B1a office use. The quantum of industrial B1c/B2 floorspace created has been more modest in comparison, whereas the quantum of B8 floorspace is broadly comparable.

8.58 In order to estimate the land take up equivalent it is first necessary to consider how this floorspace has been created, specifically whether this has been delivered through new build/redevelopment, an extension to an existing property or change of use. This is important as whilst being an indicator of demand, new employment floorspace created through a change of use will have not, in the past, resulted in the take up of new land. Extensions to existing buildings will also have a much smaller land take than larger standalone new build developments.

8.59 An analysis of this data is provided in Table 8.10 below.

**Table 8.10: Completed floorspace by type of development 2008-09 to 2014-15**

2008/09 - 2014/15	B1a	B1b	B1c	B2	B8	B1-8 mixed	TOTAL	%
Change of use	4,733	106	837	1,655	3,872	3,262	14,465	63%
New Build / Redevelopment	1,006	-	2,089	-	738	2,497	6,330	27%
Extension	50	-	-	746	1422	-	2,218	10%

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<b>Total</b>	<b>5,789</b>	<b>106</b>	<b>2,926</b>	<b>2,401</b>	<b>6,032</b>	<b>5,759</b>	<b>23,013</b>	<b>100%</b>
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*Source: Sevenoaks District Council and Turley Analysis*

- 8.60 The above analysis shows that 63% of all new employment floorspace created between 2008/09 and 2014/15 was created through change of use. The remaining 37% (or 8,548 sq m) of floorspace was created through new build, redevelopment or extensions and can therefore be associated with the take up of new, or the reuse and/or intensification of existing, employment land.
- 8.61 As the Council does not monitor take up by land the following plot ratios assumptions have been applied to convert floorspace to land:
- A plot ratio of 1.5 is again applied for new build office premises, reflecting likely multi-storey development.
  - A plot ratio of 0.4 is applied for new build industrial and warehouse premises.
  - A plot ratio of 1 is applied to extensions on the basis that site infrastructure will already be in place.
- 8.62 The results of this analysis are presented in Table 8.11 below.

**Table 8.11: Estimated Land Take Up 2008/09-2014/15**

Take up 2008/09-2014/15	B1a	B1b	B1c	B2	B8	Mixed B1-B8	Total
New Build / Redevelopment	0.07	0.00	0.52	0.00	0.18	0.62	1.40
Extension	0.01	0.00	0.00	0.07	0.14	0.00	0.22
<b>Total</b>	<b>0.08</b>	<b>0.00</b>	<b>0.52</b>	<b>0.08</b>	<b>0.32</b>	<b>0.62</b>	<b>1.62</b>

*Source: Sevenoaks District Council and Turley Analysis*

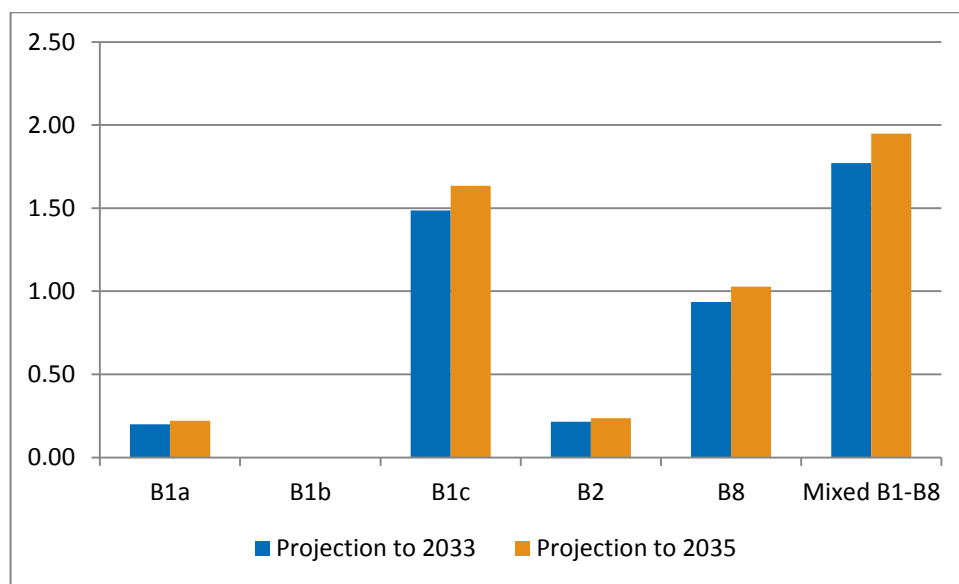
- 8.63 Table 8.11 show that over the period from 2008/09 to 2014/15 and estimated 1.62ha of employment land was taken up for development. This is equivalent to a rate of 0.23ha per annum.
- 8.64 Extrapolating the annual average take up of 0.23ha per annum between 2008/9 and 2014/15 forward over the period from 2013 to 2033 would generate a requirement for 4.6ha of employment land. Extrapolating this forward a further two years to 2035 would generate a requirement for 5.1ha.
- 8.65 These projections are broken by use class in the table and chart below and show that, based on past trends, the highest demand will be for land suitable for light industrial (B1c) and mixed B1-8 developments.

**Table 8.12: Projected Employment Land Take Up 2013-2033 and 2013-2035**

Projections to 2035	B1a	B1b	B1c	B2	B8	Mixed B1-B8	Total
Projection to 2033	0.2	0.0	1.5	0.2	0.9	1.8	4.6
Projection to 2035	0.2	0.0	1.6	0.2	1.0	2.0	5.0

Source: Turley

**Figure 8.5: Projected Employment Land Take Up 2013-2033 and 2013-2035**



Source: Turley

8.66 Whilst past development rates cannot be relied upon in isolation, extrapolating these forward provides a useful proxy for considering future levels of demand for different types of employment floorspace. There are, however, some limitations and drawbacks associated with the use of the past take up approach including:

- Past allocations of land for employment use may reflect historic policy objectives and economic strategies that are no longer relevant or appropriate to future planning purposes.
- Past allocations may also reflect historic patterns of economic and business development that are no longer relevant, given changes to business practices, market conditions and opportunities presented by technological change. For example, over the past 10-15 years there have been significant advances made in manufacturing technologies and business practices (e.g. lean manufacturing, greater use of offshoring, etc.) that have resulted in declining demand for industrial land in many areas. Similarly, the rise of internet shopping has increased demand for premises for warehousing and distribution.

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- A further implication of technological and business practice change is that there may be a legacy of poorly utilised existing employment land that could be recycled for modern uses rather than new sites becoming available.

8.67 In the case of Sevenoaks completions and past take up trends are also likely to reflect the District's constrained land supply position, across all sectors, but particularly for B1a office uses. This is evident in the comparatively high level of completions associated with change of use (and corresponding low levels of land take up), relative to the strong levels of latent demand reported by Colliers, local commercial agents and other stakeholders through the study process.

### Summary of net employment land requirements

8.68 In summary, future employment needs and land requirements in Sevenoaks have been assessed using three complementary approaches:

- Sectoral and employment forecasts and projections (labour demand);
- Demographically derived assessments of future employment needs (labour supply techniques); and
- Analysis based on the past take-up of employment land and property and/or future property market requirements.

8.69 The amount of employment land required under each of these scenarios is summarised in Table 8.13 below.

**Table 8.13: Summary of Net Employment Land Requirements**

	Labour Demand	Labour Supply	Past Take Up <sup>103</sup>
<b>Land required 2013 – 2033 (ha)</b>			
B1a/b	4.2ha	3.9ha	0.8ha
B1c/B2	-1.0ha	-1.5ha	2.3ha
B8	2.5ha	1.6ha	1.5ha
<b>Total B</b>	<b>5.7ha</b>	<b>4.0ha</b>	<b>4.6ha</b>
<b>Land required 2013 – 2035 (ha)</b>			
B1a/b	4.5ha	4.2ha	0.9ha
B1c/B2	-1.5ha	-1.8ha	2.4ha
B8	2.2ha	1.6ha	1.7ha
<b>Total B</b>	<b>5.2ha</b>	<b>4.0ha</b>	<b>5.0ha</b>

Source: Turley, 2016

<sup>103</sup> To enable comparison the requirement generated for B1-8 mixed developments has been split evenly across office, industrial and warehouse uses.

- 8.70 Whilst the land requirements generated under all three scenarios are only indicative, and will change subject to the level of analysis and assumptions applied, they provide a good indication of the sectors which are likely to drive economic land requirements across Sevenoaks over the next 20-22 years, and generate a potential net requirement for between 4ha (Labour Supply) to 5.7ha (Labour Demand) over the period from 2013-33 and 4.0ha (Labour Supply) to 5.2ha (Labour Demand) to 2035.

### **Allowance for choice and flexibility**

- 8.71 In order to plan positively for potential future employment growth it is also considered best practice to add a margin of choice/flexibility factor to the land demand forecast calculation. This is an additional amount of land that ensures a reasonable choice of sites for businesses and developers and to allow for delays in sites coming forward or premises being developed.
- 8.72 Determining a robust figure for margin of choice is not an exact science and will always be open to a degree of subjectivity. However, as highlighted from the stakeholder consultation process the lack of supply is a major perceived weaknesses and threat to the growth of the local economy. In view of this, an allowance equivalent to five years supply is considered to be appropriate.
- 8.73 This buffer will help to ensure that the Council remains responsive to potential changes and increased market demand that may occur over the plan period.
- 8.74 Where a reduction in land is forecast, no buffer has been applied.

### **Allowance for losses**

- 8.75 In planning for employment land it is prudent to make an allowance for some replacement of losses of existing employment land that may be developed for other, non B use Class employment uses, or non-employment uses such as residential.
- 8.76 The monitoring data provided by the Council indicates that between 2008/09 and 2014/15 around 46,220 sq m of employment floorspace was lost in the District, of which 31,703 sq m was B1a/b office (B1a/b) floorspace, 13,318 sq m industrial (B1c/B2) and 1,200 sq m warehouse and storage (B8) floorspace.
- 8.77 This is equivalent to a loss of 6,603 sq m per annum, which when extrapolated forward over a 20 year period, would suggest the need to potentially replace 132,060 sq m of floorspace.
- 8.78 However, on the basis that not all of these losses need to be replaced, and losses arising through office to residential conversions, which have been a key driver, may decline as the best sites and opportunities are developed early in the plan period, a percentage allowance is considered to be more appropriate. This would allow for some replacement of obsolete office and industrial premises with better quality provision elsewhere in the District, whilst also recognising that further losses through Permitted Development are still likely to occur.

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8.79 In view of the above the following allowances have been made:

- For B1a/b offices, an allowance of 1,132 sq m per annum is assumed, this is based on 25% of the average annual loss of office floorspace over the last 7 years. This would equate to 22,640 sqm, or 1.5ha of land, over a 20 year period, increasing to 1.7ha over the period from 2013-2035. This is considered appropriate given recent losses of office floorspace arising due to Permitted Development Rights. In addition to the above, the vacancy rate within the existing stock of office floorspace is at an historically low rate of 0.8%<sup>104</sup>. This is considered to be unsustainable, with a rate of 10% normally being required to ensure there is sufficient headroom in the supply and to support the healthy operation of the market.
- For B1c/B2 floorspace, an allowance of 476 sq m per annum is assumed. This is equivalent to a rate of 25% of the average annual loss of industrial floorspace over the last 7 years and would equate to 9,511 sq m, or 2.4ha of land over a 20 year period to 2033, increasing to 2.6ha over the period from 2013-2035. This allowance, which is also comparable to the land required under the past take up approach (at 2.3ha to 2033 and 2.4ha to 2035), reflects the fact that take up of B1c/B2 land has continued in the relative absence of job growth.
- A modest allowance of 46 sq m or 25%<sup>105</sup> of the average annual loss of warehousing floorspace over the last 7 years has also been assumed. This is equivalent to 856 sq m – equivalent to 0.2ha over the period to both 2033 and 2035. This small allowance is considered to be appropriate in light of the more sustainable vacancy rate within the existing stock of warehouse floorspace (12.5%<sup>106</sup>). It will also allow for some small scale replacement of losses without placing undue pressures on the District's limited land supply.

8.80 The estimated land requirement arising from each scenario when these allowances are taken into account is presented in Table 8.14 below.

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<sup>104</sup> CoStar, 2016

<sup>105</sup> This percentage than Tunbridge Wells in order to ensure the allowance has a material impact on the land supply calculation.

<sup>106</sup> CoStar, 2016

**Table 8.14: Estimated Land Requirements (2013-2033 and 2013-2035)**

	Labour Demand	Labour Supply	Past Take Up
<b>Land required 2013 – 2033 (ha)</b>			
B1a/b	6.8	6.4	2.5
B1c/B2	1.4	0.9	5.3
B8	3.3	2.2	2.1
<b>Total B</b>	<b>11.5</b>	<b>9.5</b>	<b>9.9</b>
<b>Land required 2013 – 2035 (ha)</b>			
B1a/b	7.2	6.8	2.8
B1c/B2	1.1	0.8	5.0
B8	3.3	2.2	2.3
<b>Total B</b>	<b>11.6</b>	<b>9.8</b>	<b>10.1</b>

Source: Turley

### Overall assessment of the different approaches

- 8.81 Taking into account allowances for losses and margin of choice the range increases to between 9.5ha (labour supply) scenario to 11.5ha (labour demand) between 2013 and 2033. The equivalent range over the period to 2035 is 9.8ha to 11.6ha.
- 8.82 When considered in overall terms, there is clear alignment between the different scenarios. However, when comparing the individual requirements for office and industrial floorspace a number of key differences are notable:
- The B1a/b office requirement ranges from 2.5ha under the past take up approach to 6.8ha under the labour demand scenario between 2013 and 2033. The past take up requirement is largely a result of a lack of new build office activity over the past 7 years. This is, however, considered to be more indicative of a lack of supply – both of land and existing floorspace – across the District than a lack of demand, with Council monitoring data indicating that office occupiers have been meeting their needs through conversion and change of use of existing property, including redundant agricultural buildings in rural areas. The analysis of property market conditions and the wider stakeholder consultation undertaken as part of the study also reveals a strong level of latent demand for office floorspace.
  - The B1c/B2 industrial requirement is also varied, over the period to 2033 ranging from 0.9ha under the labour supply scenario to 5.3ha when considering the past take up approach. This demonstrates that despite job losses in manufacturing and other related sectors the District’s B1c/B2 industrial market has remained active in recent years. It is notable that the Labour Demand and Labour Supply forecasts are sensitive to the forecast reduction in B1c/B2 employment.
- 8.83 On the basis of the requirements presented above and in accordance with the NPPFs promotion of positive planning, it is recommended that the Council plans on the basis of the labour demand scenario with a view of accommodating, as a minimum, the District’s objectively assessed need for 6.8ha of land suitable B1a/b office use and 4.5ha of

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industrial (B1c/B2/B8) land – a requirement of 11.5ha over the period to 2033, increasing to 11.6ha over the period to 2035; the marginal increase over the period to 2035 reflecting the continuation of job losses in B1c/B2 sectors between 2033 and 2035.

8.84 These requirements are summarised in the table below.

**Table 8.15: Summary of Land Requirements**

	Recommended OAN
<b>Land required 2013 – 2033 (ha)</b>	
B1a/b Office	6.8
B1c/B2	1.4
B1c/B2/B8 Industrial	3.3
<b>Total B</b>	<b>11.5</b>
<b>Land required 2013 – 2035 (ha)</b>	
B1a/b Office	7.2
B1c/B2 Industrial	1.1
B8 Warehouse	3.3
<b>Total B</b>	<b>11.6</b>

*Source: Turley*

- 8.85 This represents a recommended minimum requirement. However, in view of past take up and market signals, the Council may wish to consider planning on the basis of a higher requirement for B1c/B2 land, recognising that the market has been active in recent years and that take up has continued at a pace which has not necessarily reflected jobs growth.
- 8.86 Such an approach would ensure there is a sufficient choice of sites for prospective occupiers and investors and would avoid constraining the market. This could be achieved by assuming no decline across these sectors or, if the Council is willing to be more protective, by adopting the past take up projection.



## 9. Site Assessment

- 9.1 In line with Planning Practice Guidance (PPG) it is important that Local Planning Authorities identify a future supply of land which is suitable, available and deliverable for economic development uses over the plan period<sup>107</sup>. Identifying such a supply will help enable the District to respond to business requirements and meet its objectively assessed economic development needs identified in Section 8.
- 9.2 In support of this requirement, the study process has included an assessment of the existing employment land portfolio across Sevenoaks. This exercise, which has been led by Colliers International, has involved:
- Assessing the adequacy of existing employment sites and those which should be retained for future employment use;
  - Assessing the suitability of allocated employment land yet to be developed; and
  - Identifying potential new employment sites/employment locations to meet the identified future economic need.
- 9.3 Plans showing the location of the employment areas/sites forming part of the assessment are provided at Appendix 6.
- 9.4 Whilst many of the sites feature in existing development plans, and would have generally be considered suitable locations for employment use in previous rounds of policy, the focus of the appraisal is on whether circumstances have changed which would alter their suitability.
- 9.5 The Council has also requested that a number of sites/locations identified through the Call for Site process be qualitatively assessed as part of the study. The results of this analysis have been submitted separately for consideration by the Council and will be published in due course.

### Methodology

- 9.6 The starting point for Colliers was a baseline review of the local commercial market to understand the strength of demand for B Use Class and other non B uses (including retail) across the study area. Following this, and in order to determine the quality and suitability of the existing supply, all sites were inspected during March and April 2016 with proformas used to capture key information. These can be found at Appendix 7.
- 9.7 In accordance with PPG, market demand factors have been considered to enable conclusions to be reached regarding the adequacy and ongoing market attractiveness of the supply of existing employment areas and allocations. The results of this analysis have been captured in a scoring matrix to allow relative assessments of each employment area/site to be made against pre-set criteria.

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<sup>107</sup> National Planning Practice Guidance (2014) 'Housing and economic land availability assessment' paragraph 001

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- 9.8 The criteria used in this assessment includes:

### ***Location***

- 9.9 The location criteria assess' the proximity to the built or rural environment. If a site is in the built environment it will score highly, if in a rural environment but close or within a built environment a mid-score will be applied. A mid-score is also applied to sites in rural areas which make an important contribution to rural employment. If the site is in a rural environment and has no proximity to the built environment a low score has been applied.

### ***Strategic Access***

- 9.10 Good strategic accessibility was assessed on the basis of the a sites' proximity to the highway network and public transport nodes. A high score was applied if there was immediate access from a site to a major highway network or that access was within a reasonable distance of an A road, useable by HGV's and / or the site had good public transport nodes close by. A mid score was applied if the site had good access to an A road via local access routes and some public transport access. A low score was applied if there was restrictive access to major arterial routes for example the site entrance was on an unclassified road or a poor quality B road and there was no/poor public transport accessibility.

### ***Site / Premises Condition***

- 9.11 The site or premises condition assessment was based on the quality of the existing employment sites or land dependant on its attractiveness in terms of estate maintenance, car parking, evidence of vacancies and if the buildings on site were suited for modern day use. If a site was a high quality employment area with well-maintained units, grounds with ample parking a high score was applied, a high score was also applied if the site was a high quality greenfield site. A mid score was applied if the site was an established employment area with a mix of building ages and condition. A low score was applied if the site was not well-maintained, buildings looked old and there were a high level of vacancies.

### ***Availability***

- 9.12 Availability was assessed on the availability of the site within a given timescale. These timescales were within 5 years, within 10 years and if available in 10 years +, with sites available in the short term receiving a higher score.

### ***Land Ownership***

- 9.13 A higher score was given to a site if the site was in public ownership a mid-score applied if the site was in the private sector and a lower score applied if the ownership of the site is unknown or in mixed ownership (public / private). The significance of this criteria is that if the land ownership is not known or it was in multiple ownerships then the development timeframe would be slower than if in one ownership with the ownership intentions known.

### ***Market Activity / Developer Interest***

- 9.14 If recent levels of interest in the site for development or for allocation to employment use were ascertained then a high score was attributed, if there had been historic interest a mid-score was attributed. If interest in the site was minimal or unknown a low score was attributed.

***Suitability for Growth***

- 9.15 The suitability for growth is dependent on the number of sectors that would invest or occupy any of the existing sites or ‘call for sites’. A higher score was attributed if it was felt a number of Investors would invest or occupy in premises on the site dependant in its suitability. If the site were suitable for one type of occupier and or moderately suitable for more than one occupier a mid-score was attributed. A low score was attributed if the site has limited suitability for any employment occupier.

***Development Constraints (including access/infrastructure, environmental or other policy designation)***

- 9.16 This criterion assessed the sites on its benefits from a physical perspective including assumed ground condition with a greenfield site scoring higher than a brownfield site, access or form of access evidenced or assumed to be non-contentious again scoring higher than not. A mid score was applied if the site was an existing business site but there was no ability or low ability to expand. A low score was attributed if means of access into the site could not be identified or it was existing but poor. A low score was also applied if the site was not level or the shape of the site did not lend itself to development.

***Need for Investment***

- 9.17 The need for investment was assessed taking into account development constraints and assumed costs to develop. The criteria also took into account where the investment if any would be found, a higher score was attributed if no public investment was required and a lower score if major investment was required and that source of investment was unidentified.

***Viability***

- 9.18 The viability scoring was based on an assessment of costs required to develop, refurbish sites into good quality employment stock or maintain sites if in good condition vs. the anticipated demand taking into account strategic access and location. A site was assumed more viable if taking into account other criteria demand were assumed high and the costs required to maintain demand were low or marginal. A site was given a low score if occupier demand was low based on present condition or location and that was not expected to change if investment was made to develop, refurbish or maintain the site.

***Neighbouring uses***

- 9.19 If a site has no negative impacts on neighbouring uses, for example an existing employment allocation or the site was bordered by a motorway then its attractiveness as an employment allocation would be high and therefore a higher score would be attributed. If the neighbouring uses were Green Beltland or residential neighbours were close or there was no separation between the uses then the site would be less attractive and the score attributed was low. If impact is apparent or foreseen but mitigation can be installed or adequate separation is in existence a mid-score was attributed.

***Importance to Economic Development Activities***

- 9.20 If the site, allocated or proposed, is an attractive or prominent site which is currently or would in the future bring about significant benefits to the Borough or District a high score was ascribed. If a site would support regeneration or employment use would bring

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moderate benefits a mid-score was ascribed. If the site has restricted use or is restricted in size and therefore demand is or would be limited the site was ascribed a low score.

9.21 The scoring matrix concludes by assessing the sites on a good, adequate or poor basis:

- A **good** site is a site which should have its employment allocation protected. These sites have scored highly in the matrix assessment; the sites will be well located, accessible and be fit for modern B use classes with no or few conflicts with adjacent occupiers/uses.
- An **adequate** site will be an acceptable employment site which has some compromises in terms of location and or access. The site may require investment to bring the premises up to date. These sites may have the potential for alternate uses.
- **Poor** sites will have low quality accommodation and will have many vacant units. They will almost certainly be in the wrong location or will conflict heavily with adjacent uses. These sites will have high potential for alternate uses including residential. The Council may wish to consider reallocation of the site through the Local Plan process.

9.22 The headline results from the site survey and assessment process is summarised below, with more detailed site specific analysis provided at Appendix 8.

### **Sevenoaks Site Assessments**

9.23 A total of 32 employment areas/sites have been assessed across Sevenoaks District. These sites are summarised in Table 9.1 below and include:

- 29 existing employment sites/allocations
- 3 major developed employment sites in the Green Belt; and

9.24 In addition to the above, Colliers have also considered 14 sites identified through the Call for Sites process. The results of this analysis has been submitted separately for consideration by the Council and will be published in due course.

**Table 9.1: Sevenoaks District Employment Sites**

Turley/Colliers Reference	Site Name	Site area (ha)
S_EA1	British Telecom, London Road Sevenoaks	1.76
S_EA2	Tubs Hill House, Sevenoaks	0.41
S_EA3	Erskine House, Sevenoaks	0.46
S_EA4	High Street, Sevenoaks	1.45
S_EA5	South Park, Sevenoaks	0.18
S_EA6	Lime Tree Walk, Sevenoaks	0.3
S_EA7	The Technology Centre, Swanley	1.77
S_EA8	Swanley Town Council Offices, Swanley	0.35
S_EA9	Park Road Industrial Estate, Swanley	1.33
S_EA10	Station Approach North, Edenbridge	0.45
S_EA11	Media House, Swanley	0.29
S_EA12	Horizon House, Swanley	0.33
S_EA13	Swan Mill, Goldsel Road, Swanley	2.62
S_EA14	Station Road, Edenbridge	18.78
S_EA15	Edenbridge Trading Centre/ Warsop Trading Centre	1.64
S_EA16	Hardy's Yard, Riverhead	1.25
S_EA17	Vestry Road, Sevenoaks	11.37
S_EA18	Bat and Ball Enterprise Centre, Sevenoaks	1.8

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S_EA19	Morewood Close (Excluding Housing Area), Sevenoaks	3.66
S_EA20	Southern Cross Industrial Estate	1.89
S_EA21	Land at Broom Hill, Swanley	8.12
S_EA22	West Kingsdown Industrial Estate, London Road, West Kingsdown	0.47
S_EA23	Blue Chalet Industrial Park, West Kingsdown	0.88
S_EA24	Westerham Trading Centre, Westerham	3.70
S_EA25	Horton Kirby Trading Estate, South Darent	0.8
S_EA26	London Road, Sevenoaks	3.97
S_EA27	Moreton Industrial Estate, Swanley	1.84
S_EA28	Wested Lane Industrial Estate, Swanley	8.21
S_EA29	Teardrop Industrial Estate	3.4
S_MDES1	Fort Halstead	40.14
S_MDES2	North Downs Business Park	6.06
S_MDES3	Chaucer Business Park	4.45
<b>Total Area</b>		<b>133.84ha</b>

*Source: Sevenoaks District Council*

**Appraisal of Existing Employment Areas**

9.26 The existing employment sites have been assessed using the matrix scoring system in Appendix 8. The results of this analysis are summarised in Table 9.2 and Figure 9.1 below.

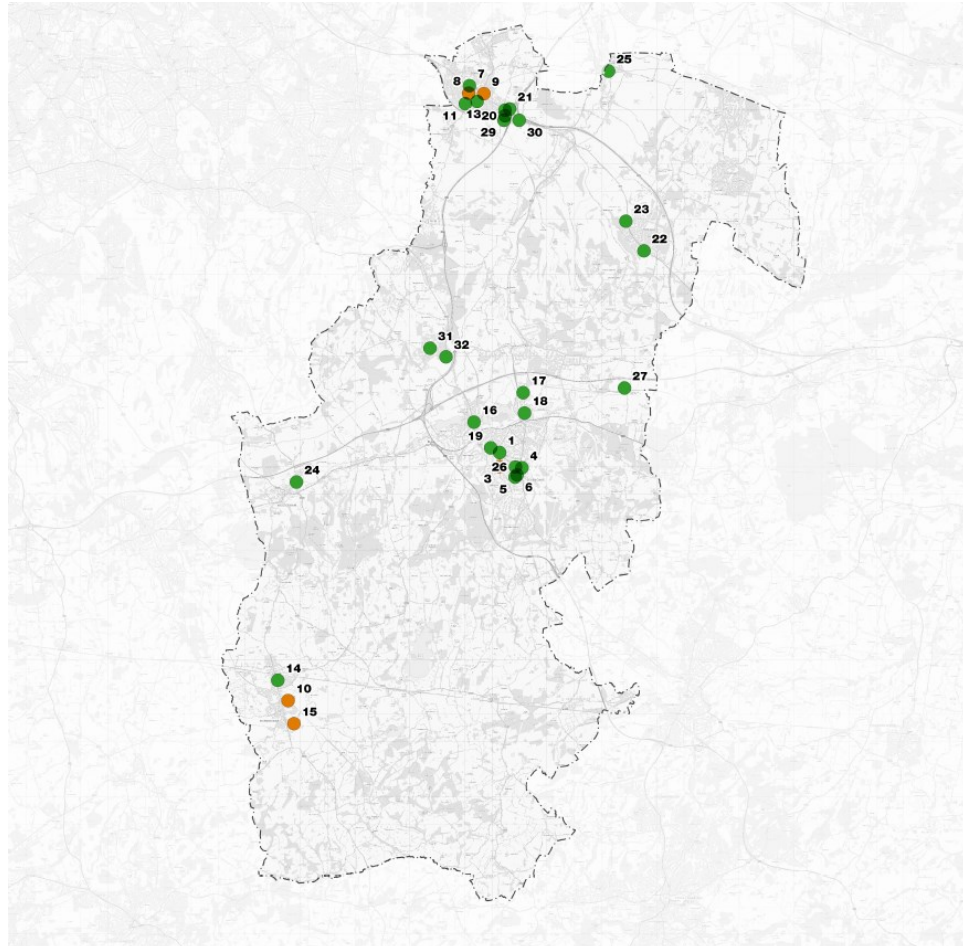
**Table 9.2: Site Appraisal Results - Sevenoaks**

Rating	Hectares	Percentage of total sites assessed
Good	128.87ha	96.8%
Adequate	4.23ha	3.2%
<b>Total</b>	<b>133.1ha<sup>108</sup></b>	<b>100%</b>

*Source: Colliers International*

<sup>108</sup> Calculation excludes Tubbs Hill House & Horizon House which are being covered to residential.

**Figure 9.1: Appraisal of Existing Employment Areas**



**Legend**  
Overall Quality and Attractiveness Rating

- Adequate
- Good

Label	Site Name
1	British Telecom, London Road Sevenoaks
2	Tubs Hill House, Sevenoaks
3	Erskine House, Sevenoaks
4	High Street, Sevenoaks
5	South Park, Sevenoaks
6	Lime Tree Walk, Sevenoaks
7	The Technology Centre, Swarley
8	Swarley Town Council Offices, Swarley
9	Park Road Industrial Estate, Swarley
10	Station Approach North, Edenbridge
11	Media House, Swarley
12	Horizon House, Swarley
13	Swan Mill, Goldsel Road, Swarley
14	Station Road, Edenbridge
15	Edenbridge Trading Centre/ Warsop Trading Centre
16	Hardy's Yard, Riverhead
17	Vestry Road, Sevenoaks
18	Bat and Ball Enterprise Centre, Sevenoaks
19	Morewood Close (Excluding Housing Area), Sevenoaks
20	Southern Cross Industrial Estate
21	Land at Broom Hill, Swarley
22	West Kingsdown Industrial Estate, London Road, West Kingsdown
23	Blue Chalet Industrial Park, West Kingsdown
24	Westerham Trading Centre, Westerham
25	Horton Kirby Trading Estate, South Darenth
26	London Road, Sevenoaks
27	Chaucer Business Park MDES3
28	Moreton Industrial Estate, Swarley
29	Wested Lane Industrial Estate, Swarley
30	Teardrop Industrial Estate
31	Fort Halstead MDES1
32	North Downs Business Park MDES2

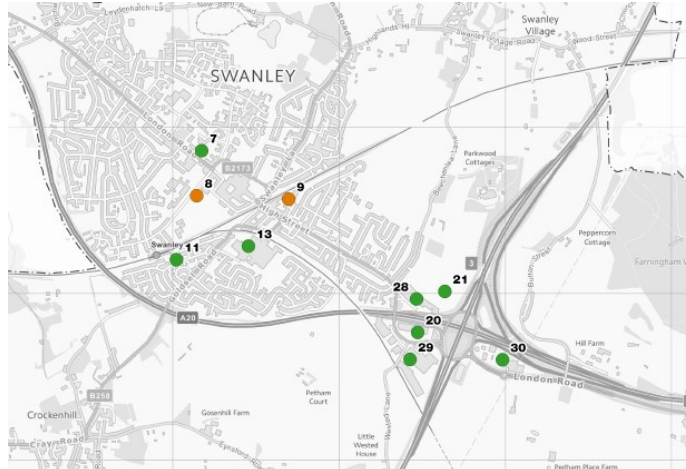
Contains Ordnance Survey data (c) Crown copyright and database right 2016

Source: Turley and Colliers International





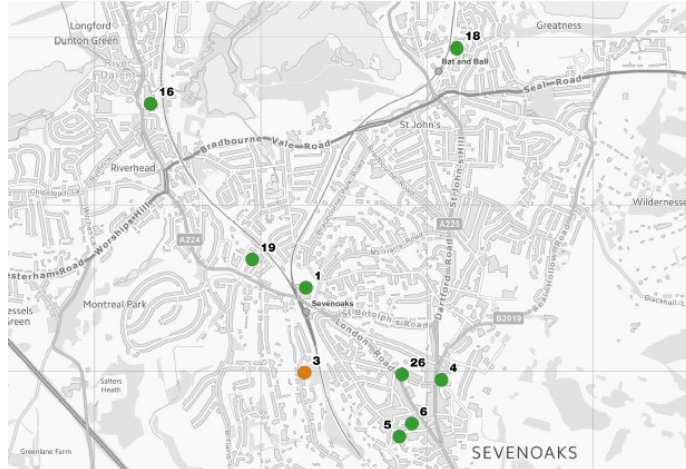
Figure 9.2: Appraisal of Existing Employment Areas – Sevenoaks Town and Swanley



Contains Ordnance Survey data (c) Crown copyright and database right 2016

**Legend**  
Overall Quality and Attractiveness Rating  
● Adequate  
● Good

Label	Site Name
7	The Technology Centre, Swanley
8	Swanley Town Council Offices, Swanley
9	Park Road Industrial Estate, Swanley
11	Media House, Swanley
12	Horizon House, Swanley
13	Swan Mill, Goldset Road, Swanley
20	Southern Cross Industrial Estate
21	Land at Broom Hill, Swanley
28	Moreton Industrial Estate, Swanley
29	Wested Lane Industrial Estate, Swanley
30	Teardrop Industrial Estate



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**Legend**  
Overall Quality and Attractiveness Rating  
● Adequate  
● Good

Label	Site Name
1	British Telecom, London Road Sevenoaks
2	Tubs Hill House, Sevenoaks
3	Erskine House, Sevenoaks
4	High Street, Sevenoaks
5	South Park, Sevenoaks
6	Lime Tree Walk, Sevenoaks
16	Hardy's Yard, Riverhead
18	Bat and Ball Enterprise Centre, Sevenoaks
19	Morewood Close (Excluding Housing Area), Sevenoaks
26	London Road, Sevenoaks



Source: Turley and Colliers International

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- 9.27 The following provides a brief statement on the suitability and market attractiveness of each of the employment areas/sites assessed.

### ***British Telecom, London Road Sevenoaks***

- 9.28 The site comprises a B1 use development with associated car parking. The building is of modern brick construction built in the late 90's. The building is over three floors with a full height glass façade to the front of the building. Car parking on site has been developed to work with levels providing car parking at grade to the east of the building with an undercroft providing further car parking on site. The unit is fit for purpose well maintained and in a good location. **Colliers' view** is that this is a good employment site

### ***Tubs Hill House Sevenoaks***

- 9.29 The site is developed land which is on a hill increasing in gradient from north to south. It is located in between the town centre and train station. The site has been constructed as a north and a south 'tower'. The previous use was B1 however it is now being converted into residential apartments.

### ***Erskine House, Sevenoaks***

- 9.30 The site is developed with a building of brick construction and associated private car parking. The building is currently used as a B1 office occupied by the residential developer Berkeley Homes. The site is located on a private road of predominantly residential development. **Colliers' view** is that this is an adequate employment site.

### ***High Street, Sevenoaks***

- 9.31 The 'High Street' employment area is located along the northern end of Sevenoaks High Street and along Suffolk Way. The units in this area are of traditional brick construction between two and three storeys in height. Many of the units have associated car parking at basement level. Due to the sites being located on the junction of London Road, Pembroke Road and Suffolk Way there is no on street parking. The retail area of Sevenoaks is close for amenities, the train station is within walking distance and the buildings are well maintained and offers a range of differing size businesses. There are sensitive adjacencies and so B2 use would not be appropriate. Site plots are not of a size to support B8. **Colliers View** is that this is a good employment site.

### ***South Park, Sevenoaks***

- 9.32 There are a number of different uses in this area. A medical centre which is a two storey modern build unit is adjacent to a four storey residential development of brick construction with private car parking. The standalone Anton House at the west of the site is a two storey building of brick construction with private car parking to the front of the building this is a B1 use. The site is not suitable for B2 for B8 uses given sensitive adjacencies. **Colliers' view** is that this is an adequate employment site.

### ***Lime Tree Walk, Sevenoaks***

- 9.33 The site is a developed business area which fronts onto Lime Tree walk and extends south to South Park. There is car parking throughout the site for tenants/occupants. The existing uses are predominantly B1 uses. The buildings in the north east corner of the site facing Lime Tree Walk would benefit from maintenance; this building is of brick construction and two storeys in height. Sevenoaks Business Centre also facing Lime Tree Walk is well maintained and is a serviced office centre over three floors. **Colliers' view** is that this is a good employment site.

***The Technology Centre, Swanley***

- 9.34 These are two business estates located adjacent to each other to create the 'Tech Park'. White Oak office park is to the south east of the site and the 'Tech Park' is to the north west of the site. The site is well maintained, well occupied and has good access to the highway network. There are amenities for employees and the site is within walking distance of the train station. **Colliers' view** is that this site is a good employment site.

***Swanley Town Council Offices, Swanley***

- 9.35 This is a site developed for B1 use currently occupied by Swanley Town Council. It has allocated parking on site and is within the town centre. The site adjacencies include education facilities opposite which congests the street at picking up/dropping off times and recreational fields to the rear. Due to the sensitive adjacent uses, a school and the small plot size this would not be suitable for B2 or B8 use. Whilst the road is congested there are excellent links to the train station. The site has limited potential to extend unless the recreational fields are used. **Colliers' view** is that this is a good employment site.

***Park Road Industrial Estate, Swanley***

- 9.36 The site is developed as an industrial estate located at the rear of Swanley High Street. There are 15 units in total with associated car parking and loading bays. The site lacks visibility from the High Street and is accessed via an unmade road where the older and less well maintained buildings front onto. There are residential properties surrounding this site. The business park is fully occupied although refurbishment of some buildings would raise the appeal of the employment offer. Due to the sensitive surroundings of this site it should maintain its B1 use. It would not be suitable for B8 or B2 use. **Colliers' view** is that this is an adequate employment site

***Station Approach North, Edenbridge***

- 9.37 The site is occupied by Jewsons. There are two buildings on site, a prefabricated building at the entrance of the site which is used as an office/ reception area and a listed building in the middle of the site. The site is elongated and triangular in shape. There is poor accessibility for commercial uses; vehicles are parked on either side of the approach road (Station Approach) to the site which leaves a narrow single lane access route. Edenbridge Town train station is adjacent to the site and the train line is one of the longest borders to the site. B2 and B8 would not be appropriate due to the congested and narrow access road to the site. **Colliers' view** is that this is an adequate employment site.

***Media House, Swanley***

- 9.38 This site was developed, c.1980's, with one office building with associated car parking to the rear. The unit is three stories and is of brick construction with a large amount of glazing on the facade. The site is currently occupied by United House residential developers who have recently taken occupation for B1 use. B2 and B8 use would not be considered a good use of this site given the local adjacencies. **Colliers' view** is that this is a good employment site.

***Horizon House, Swanley***

- 9.39 Former office block which has recently been converted to c.60 apartments.

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### ***Swan Mill, Goldsel Road, Swanley***

- 9.40 This site is developed and is occupied by Swantex for use as a paper mill. This site is currently fulfilling the requirements of a major local business but there is no room to extend. **Colliers' view** is that this is a good employment site.

### ***Station Road, Edenbridge***

- 9.41 Station Road industrial area covers 18.8ha and covers an area east and west of Station Road. The site is well occupied and there have been a number of recent building refurbishments. There are a wide range of uses in site – B1, B2 and B8. This is a well-used, established and maintained industrial area, making this an attractive site. The limited immediate access to the A road and motorway network does not appear to be a disadvantage to the park. **Colliers' view** is that this is a good employment site.

### ***Edenbridge Trading Centre/ Warsop Trading Centre***

- 9.42 The site comprises two independent industrial estates located adjacent either side of Philippines Close and at the edge of a residential area. There is a slight gradient across the sites and both sites are fully developed. Estate maintenance is of a very poor standard on the eastern site and is of limited attractiveness to prospective tenants. The western site is maintained to a higher standard and there is potential for a comprehensive redevelopment of both sites. **Colliers' view** is that this is an adequate employment site.

### ***Hardy's Yard, Riverhead***

- 9.43 There are a number of occupiers on this site including a scrap metal merchant, a Jaguar / Aston Martin dealership and a number of office buildings of brick construction over two floors. Topps tiles are tenants and there is a children's nursery on site. Good strategic accessibility off London Road (A224) into the estate and the site is close to the A25 which links into the M25. The site is occupied, is well maintained, and is attractive for business's. The site has public transport links and is located close to Sevenoaks town centre. B1, B2 and B8 uses would be suitable for this site. **Colliers' view** is that this is a good employment site.

### ***Vestry Road, Sevenoaks***

- 9.44 A large development of buildings of varying ages with a number of new retail / trade units (Topps Tiles) and an office building which at the time of visiting was being refurbished. The larger site comprises a number of industrial estates collectively known as the Vestry Road estate. The estate is well occupied although there are a number of vacant buildings. The allocation should remain for B1, B2 and B8 uses. There are a number of units on site which could be redeveloped to improve the property stock and vertical development would be appropriate in this area to increase the space available. **Colliers' view** this is a good employment site.

### ***Bat and Ball Enterprise Centre, Sevenoaks***

- 9.45 The premises on this estate are modern (c.1990's) steel frame construction which is in good condition. The layout provides good visibility of the units and from the main estate road. This is an established industrial estate with B1, B2 and B8 uses. Occupants include by Halfords and Grahams the plumbing merchants. The access to the estate road is congested and appropriate mitigation measures should be considered. The Bat

and Ball Train Station entrance and is located on the edge of the site. **Colliers' view** is that this is a good employment site.

***Morewood Close (Excluding Housing Area), Sevenoaks***

- 9.46 This site has 12 industrial units of c. 1970's construction which at the time of visiting appeared to be fully occupied. The estate road leads to the car park for Sevenoaks train station. The site has limited expansion opportunities due to its adjacencies. The site has a number of residential properties surrounding and is close to the town centre – this area would not be suitable for B2 use but would be suitable for B1 and B8 use. **Colliers' view** is that this is a good employment site.

***Southern Cross Industrial Estate***

- 9.47 This is a linear site situated north of London Road. The parade is positioned east to west on site in a terraced configuration. The site has excellent access to the major motorway network of the M25 with good access and egress. This is an established industrial / warehousing location within minimal adjacencies which would restrict use of the site. The site was fully occupied at the time of assessment for B8 use. **Colliers' view** is that this is a good employment site.

***Land at Broom Hill, Swanley***

- 9.48 The site is undeveloped greenfield site to the north of Southern Cross industrial Estate; the site has planning permission for a mixed use scheme. The site has limited access from an unclassified road to the north which would be unsuitable for heavy / large vehicle use. Access from the south through the Southern Cross Industrial Estate could be created. To the east of the site is the M25 to the west is a residential area. The land to the west of the site would be suitable for residential and the land to the east of the site would be suitable for employment uses if a suitable buffer zone were developed between the two, creating a mixed use scheme of C3, B1 and B8 uses. **Colliers view** is that this is a good employment site.

***West Kingsdown Industrial Estate, London Road, West Kingsdown***

- 9.49 The site is located to the west of London Road (A20). The site is a development of 12 steel frame units on either side of a shared service yard/car park. The development is well maintained and has the potential to extend to the west/south of the site. The site is suitable for B1 use. **Colliers' view** is that this is a good employment site.

***Blue Chalet Industrial Park, West Kingsdown***

- 9.50 This is a small industrial estate of 46 units in a courtyard style configuration with parking in the centre. The development is of modern steel frame development (c.1980's). The site is located at the northern edge of West Kingsdown. The occupants are predominantly servicing the motor trade – given the proximity to Brands Hatch. The site is located on the western site of London Road (A20) and is c.5 miles to the M20/M25. The site is suitable for B1 use and there is a possibility of extension to the north of the site. **Colliers' view** is that this is a good employment site.

***Westerham Trading Centre, Westerham***

- 9.51 The site is located to the north of Westerham town centre. The site itself is in two parts to the north and to the south of London Road. To the north of London Road is the Crown Building a three storey brick office building with private car parking on site. The majority of buildings on site are to the south of London Road. These buildings are a mix of small

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lock up units, larger office buildings, warehouse and light industrial units. The site is suitable for B1 and B8 uses. B2 would be unsuitable here given surrounding uses and proximity to the town centre. **Colliers' view** is that this is a good employment site.

### ***Horton Kirby Trading Estate, South Darent***

- 9.52 A developed trading estate / light industrial estate with a mix of building types of B1 and B8 use. Units are of brick construction over one or two floors new builds and converted mill buildings. The estate is well kept and managed. The site is flat and is regular in shape. This site is easily accessible for the motorway network via the A225. **Colliers' view** is that this site is a good employment location.

### ***London Road, Sevenoaks***

- 9.53 This area is an established office area with occupiers such as Sevenoaks District Council. The area is within walking distance to the train station and the amenities of the town centre. The area would be unsuitable for any other B use than B1a use. **Colliers' view** is that this area is a good employment location.

### ***Moreton Industrial Estate, Swanley***

- 9.54 Existing industrial estate; three units in a terrace build with loading bays and shared car parking. The site is located east of the M25 and north of the M20. Located close a number of other industrial estates. There are residential properties to the north west and south west of this site. This is a well maintained employment allocation and due to the sites adjacent uses and strategic location close to the motorway access would be suitable for B1 and B8 uses. However would be unsuitable for B2 use given the residential adjacencies. **Colliers' view** is that this is a good employment site.

### ***Wested Lane Industrial Estate, Swanley***

- 9.55 In this area there are a mix of occupiers and the condition of the units vary across the site. On the western site the occupiers include an aggregates merchant, a construction firm and a number of car mechanic garages. There are a number of vacant units in this area. To the west is the 'Interchange' a distribution centre for tenants such as Dreams. There is excellent access to the strategic highway access. The boundaries of the site are not sensitive for B2 or B8 and B1 would also be suitable. There is potential to improve the estate maintenance in the northern part of the site to increase attractiveness. **Colliers' view** is that this is a good employment site.

### ***Teardrop Industrial Estate***

- 9.56 This site comprises a Sevenoaks household recycling centre, highways depot and two light industrial buildings / office buildings one of which is occupied. There are no residential or adjacent uses which would be impacted by noise by B2 or B8 uses. The access into the site and its proximity to the M25/M20 is attractive for the uses allowed. **Colliers' view** is that this is a good employment site.

## **Major Developed Sites in the Green Belt**

### ***Fort Halstead***

- 9.57 This site is currently occupied by the Ministry of Defence and is the largest employment site in the District. The MoD is removing operations of site and the site has been sold for mixed use development which will include employment uses. The employment is not expected to increase jobs on site it will have a net effect in terms of employment figures.



The outline planning consent includes a hotel, retail units, office space and a crèche. B1 office supply in the Sevenoaks area is limited and it is expected that there will be demand for space within the development. It is expected that the demand for B1 space will come from local business. There is little B2 space available in the Sevenoaks area and it is expected that there will be strong demand for space if it is developed. In summary there is likely to be high demand for employment uses on this site especially for large industrial units and from local business requiring an upgrade in office space. **Colliers view** is that this is a good employment site.

***North Downs Business Park***

- 9.58 This is a Major Developed Employment Site in the Green Belt. The site is close to the M25 but the closest junction is c. 3m to the south, there is no public transport links close by. The estate appears to be established and fully occupied. There are no adjacencies currently which would be impacted by traffic or noise from this employment site. This site is suitable for B1 and B8 use. **Colliers view** is that this is a good employment site.

***Chaucer Business Park***

- 9.59 This is an 80's / 90's office and light industrial development set in a rural location. It is a Major Developed Employment Site in the Green Belt. The site is predominantly level. There is a mixture of building construction styles on the site with traditional brick and render offices to steel frame construction units with a mix of one and two storey buildings. The site is landscaped and well maintained. There is no direct or close link to the motorway network however the site is well maintained and well occupied. **Colliers' view** is that this is a good employment site.

**Sites / Locations with potential for development or expansion**

- 9.60 There are few sites which have development or extension potential in the District as the existing employment areas are largely fully developed and occupied.
- 9.61 Land at Broom Hill remains undeveloped. However, although strategically located for the highway network the site has failed to come forward for development. If the site were developed it would deliver c.3 ha of employment land and due to its location be an extension of the established industrial areas of east Swanley.
- 9.62 Colliers consider that Chaucer Business Park - an established Major Employment Site in the Green Belt which is fully occupied and performing well – has potential for expansion. Although being constrained in policy terms by its Green Belt designation, the site benefits from its proximity to Kemsing train station and is not constrained by adjacent users. Expansion of the site would be subject a formal review of the Green Belt, but is considered to be met with strong levels of demand from occupiers seeking office, light industrial (B1) and small scale warehousing and storage (B8) floorspace.
- 9.63 Other areas of the District where new supply would be met with demand include:
- areas close to main arterial roads (including Motorways), where accessibility to the highway network for business operations is quick;
  - areas which are close to public transport nodes or sites which have space for ample car parking for staff and customers will also be met with demand; and

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- areas which have a critical mass of employment uses and amenities. These areas will be attractive to investors and occupiers, as the highway and public transport infrastructure will already be in existence.



## 10. Supply Demand Balance and Policy Recommendations

- 10.1 This section draws together the forecasts of future employment land needs to compare actual levels of available land with anticipated requirements. This is based on estimates of land available across the District's existing and allocated employment sites set out in Section 9, in order to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

### Quantitative need

- 10.2 PPG states that local authorities should develop an idea of future economic needs based on a range of data and forecasts of quantitative and qualitative need. In this respect, planning for employment growth should avoid relying on single sources of data or projections which tend to rely upon a number of different variables which are inevitably subject to change.
- 10.3 The District's objectively assessed needs and future employment land requirements have therefore been established using a range of techniques. The recommended requirements for the District over the periods to 2033 and 2035 are summarised in Table 10.1 below.

**Table 10.1: Recommended Land Requirements 2013-2033/35**

	OAN/ Employment Land Requirement
<b>Land required 2013 – 2033 (ha)</b>	
B1a/b Office	6.8
B1c/B2 Industrial	1.4
B8 Warehouse	3.3
<b>Total B</b>	<b>11.5</b>
<b>Land required 2013 – 2035 (ha)</b>	
B1a/b Office	7.2
B1c/B2 Industrial	1.1
B8 Warehouse	3.3
<b>Total B</b>	<b>11.6</b>

Source: Turley

- 10.4 These approaches generate an objectively assessed need for 11.5ha of employment land over the period from 2013-2033, which increases to 11.6 over the period to 2035. Whilst it would be typical to present a residual requirement - taking into account completions over the period from 2013-2015 - in the case of Sevenoaks, where new floorspace has been created this has been more than offset by losses of floorspace. A similar trend is apparent from the review of pipeline schemes.

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- 10.5 In view of this, no further adjustments are proposed at this stage of the analysis and it is recommended that the Council continues to plan to meet its full objectively assessed need.
- 10.6 As detailed in Section 9, the pipeline supply of employment land (excluding any potential future allocations identified through the Council's Call for Sites exercise) in the District comprises approximately 3 ha (net) of land at Broomhill, Swanley. A broad comparison of estimated demand for B use Class land against the identified site supply is shown in the table below.

**Table 10.2: Supply/demand balance 2013-2033/35**

Employment Land Requirement (Ha)	
<b>Land required 2013 – 2033 (ha)</b>	
B Use Class Land Requirement	11.5
Land Supply	3.0
<b>Total B</b>	<b>-8.5</b>
<b>Land required 2013 – 2035 (ha)</b>	
B Use Class Land Requirement	11.6
Land Supply	3.0
<b>Total B</b>	<b>-8.6</b>

Source: Turley

- 10.7 The above analysis shows that the District has a shortfall of land – equivalent to around 8.6ha - to accommodate future B use Class development over the period to 2035. Given the constrained land supply position this requirement will need to be met through new allocations to complement the remaining allocated site at Broom Hill, Swanley.
- 10.8 It is notable, however, that this land has been allocated for a number of years and has yet to come forward for development. Whilst Colliers have concluded that this is a good employment site, largely due to its strategic location adjacent to the M25 Motorway, in the event that the 3ha allocation does not come forward – either in part or in its entirety – additional sites may need to be identified.

### Qualitative need

- 10.9 The case for new allocations in Sevenoaks is strengthened when considered in the context of recent levels of market demand and other qualitative needs.
- 10.10 The District is characterised by a strong level of demand for both office and industrial floorspace across existing employment areas. Colliers analysis of the relative performance of these areas also serves to highlight their ongoing popularity and sustainability in economic development terms, with some operating at full, or near to full, capacity.
- 10.11 Currently, these issues are being compounded by:
- High levels of occupation within existing employment areas;

- The ageing stock of office and industrial floorspace;
- Permitted Development Rights, coupled with very low vacancy rates within the existing stock of office floorspace;
- Limited residual site capacity for new development - Broomhill is currently the only allocated site suitable for a mix of B1-8 development; and
- Market perceptions regarding the lack of available supply, which act as a disincentive to prospective investors across all sectors.

10.12 There is evidence to suggest that in the absence of suitable sites and premises, demand for floorspace is being met through change of use. In rural areas there is also evidence of new floorspace being created through the conversion of redundant and other agricultural premises. These developments, whilst responding to demand in rural areas, have been comparatively small scale with the nature of development constrained by the setting or type of premises being converted.

10.13 As highlighted through the stakeholder engagement process, the current lack of headroom in the supply of land and floorspace, particularly office, is a key concern. As well as acting as a disincentive for new investors, it also limits the scope for movement and expansion within the existing business base.

10.14 Whilst there is an overriding need to ensure the available land supply is used efficiently, if insufficient land is allocated for future employment yielding uses, then there is a risk that the supply of employment land may become a constraint on growth of local businesses or the ability of the District to realise its full economic potential.

### **Needs across the FEMA**

10.15 As demonstrated within Section 2, it is evident that Sevenoaks District and Tunbridge Wells Borough share important economic linkages which also extend to cover parts of neighbouring Tonbridge and Malling. Although it is not the intention of the authorities to prepare a joint Local Plan, it is nevertheless beneficial - and a requirement of the PPG - for each authority to have an appreciation of economic needs across this wider functional economic geography.

10.16 This report has identified an OAN for at least 11.5ha of employment land across Sevenoaks District over the period to 2033, increasing to 11.6 over the period to 2035. When assessed against the District's remaining allocations and committed schemes there remains a shortfalls of around 8.6ha of employment land to accommodate future B use Class development over the same period.

10.17 The study has identified an OAN for at least XXha of employment land across Tunbridge Wells over the period to 2033, and XXha to 2035. Like Sevenoaks, the supply of land available for new B use class employment development is limited and results in a shortfall of around XXha over the period to 2033 and XXha over the period to 2035.

10.18 Collectively Sevenoaks and Tunbridge Wells have an identified OAN for at least XXha of employment land over the period to 2033, with an overall need to identify XXha of employment land across the two authorities. Over the period to 2035, the identified OAN

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is for XXha of employment land with an identified shortfall of XXha. Given the constrained land supply position, the majority of this requirement will need to be met through new allocations.

- 10.19 The latest assessment of economic needs across Tonbridge and Malling was published in December 2014. This study, prepared by Nathaniel Lichfield & Partners (NLP) considers needs over the period to 2031. Four different scenarios for future employment land were considered as part of the study, the majority of which indicated higher levels of future economic growth in Tonbridge and Malling than the Borough had achieved in the recent past, implying in broad terms a need for between 67.2ha and 92.7ha of employment land over the period to 2031. The study confirms that the majority of this requirement relates to industrial (B1c/B2) and warehouse and storage (B8) uses.
- 10.20 The study concludes that Tonbridge and Malling has a shortfall of employment floorspace to meet future needs up to 2031, although this supply demand balance varies between individual office and industrial uses and by location. Whilst there is sufficient supply to accommodate the Borough's future office needs, there is an identified shortfall of industrial space equivalent to between 3.2ha and 33ha. The study notes that there is scope for Tonbridge to play a greater role in accommodating the Borough's identified economic needs over the longer term, particularly with regards to industrial activity and this may require identifying additional land to accommodate industrial, particularly B8, uses in and around the town, potentially as part of selective extensions to existing industrial estates<sup>109</sup>.
- 10.21 The ENS study process has identified a number of potential areas of search for new allocations within Sevenoaks and Tunbridge Wells. A number of sites have also been identified through the Call for Sites exercises undertaken across each area. Although subject to the Local Plan process, at this stage it is not envisaged that Sevenoaks or Tunbridge Wells will be reliant on each other, or adjoining authorities, to meet their identified OAN. However, the allocation of new sites will represent a key discussion point between the two authorities, and also Tonbridge and Malling Borough Council who are also planning to accommodate growing demand for industrial space.

### Recommendations

- 10.22 The above provides a strong quantitative and qualitative case for retaining existing employment areas and allocating additional land to accommodate the District's future needs. It is therefore recommended that the Council:
- Retains its supply of existing employment sites. Selective release of poorly performing sites following future surveys may be appropriate, but only where it can be demonstrated that there are no other suitable sites for the proposed use and there is scope to substitute any land lost with new allocations in sustainable locations.
  - Assesses the scope for expansion of best performing employment sites including – subject to Green Belt assessment - land adjacent to Chaucer Business Park

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<sup>109</sup> NLP (2014) Tonbridge and Malling Employment Land Review – Final Report, p62

and Vestry Road Industrial Estate, acknowledging environmental constraints and policy designations.

- Maximises the employment growth potential of Swanley through the identification of new strategic allocations in this location.
- Identifies new allocations to accommodate demand, particularly for B1a office and B8 storage and warehouse occupiers, with consideration of sites which may be suitable for a mix to B1-8 uses to accommodate potential demand arising from B1c/B2 occupiers. Areas of the District where new supply would be met with demand include:
  - areas close to main arterial roads, where accessibility to the highway network for business operations is quick;
  - areas which are close to public transport nodes or sites which have space for ample car parking for staff and customers will also be met with demand; and
  - areas which have a critical mass of employment uses and amenities. These areas will be attractive to investors and occupiers, as the highway and public transport infrastructure will already be in existence.

10.23 In addition to the above, Sevenoaks borders a number of other administrative areas, namely Wealden, Tandridge, Bromley, Dartford and Gravesham. It will be important that the Council continues to work collaboratively with these authorities as they take forward their Local Plans, and in line with Duty to Co-operate, ensures the effective coordination of cross boundary issues relating to employment land.

### **Enabling actions**

10.24 The following enabling actions are also recommended:

- Undertaking a survey of start-up, small and rural businesses to understand their needs and location requirements. The study could then be used to inform policy decisions regarding the location of new start-up, incubator and grow on space.
- Continuing to support rural based employment development by responding positively to proposals that encourage the re-use of redundant agricultural buildings.
- The use of Council landholdings to attract inward investment, and where possible, encourage both design and build and speculative office (B1a/b), industrial (B1c/B2) and warehouse (B8) development. This should be supported by ongoing business, investor and umbrella organisation (e.g. Locate in Kent, South East LEP, UKTI) engagement to raise awareness of the District's land and property offer.
- Improvements to digital connectivity to support further growth of the rural economy and homeworking. Whilst this is outside of the Council's direct control,

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there may be opportunities to engage with providers or seek additional funding sources to support local digital infrastructure projects and investments.

### **Monitoring**

- 10.25 It will be imperative that the employment land position is monitored to ensure the District remains responsive should changes in the pattern of supply and demand occur over the plan period. It is therefore recommended that the assessment of sites is kept up-to-date as part of the Council's monitoring report and should be updated yearly. This includes recording both completed floorspace as well as land take up (in hectares) to assist with future monitoring and assessments of need.
- 10.26 It is also prudent to make regular updates to the underlying demand evidence, to reflect any changes in economic market conditions. With this in mind, it is recommended that a comprehensive assessment of economic development need is undertaken every 3-5 years, with an early review in 2017 recommended in this instance to take into account any changes in economic circumstances and forecasts arising from Britain's decision to leave the European Union.









## **Appendix 1: List of Available Office Stock**

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Building	Address	Available space (sq ft Net Internal Area)	Notes
	Oak House, London Road, Sevenoaks	1,500	Self-contained open-plan suite of air-conditioned offices on the upper ground floor of a modern building with private parking. Quoting £26.60 psf
	3rd Floor, Suffolk Way, Sevenoaks	3,457	Town centre refurbished Grade "A" standard with suspended ceilings, fluorescent lighting, on-site parking for 10 cars and a 13-person passenger lift.
	The Old Harpsichord Factory 2 Bradbourne Road, Sevenoaks	1,927	Refurbished self-contained offices with parking. Quoting £9 psf or £500,000 for a freehold sale with vacant possession.
	The Studio, 149 High Street, Sevenoaks	432	Self-contained office building constructed in 2012. Comfort cooled/heated, carpeted, perimeter trunking, multiple-opening rooflight and parking for 2 cars. Quoting £23.00 psf.
	Caxton House, Maidstone Road, Sevenoaks	1,468	Two-storey brick building with pitched, slated roof and parking for approx 10 cars. Quoting £17.00 psf
	71 Dartford Road, Sevenoaks	1,568	Four-storey, semi-detached Victorian building in need of refurbishment. Quoting price on application.
	53-55 High Street, Sevenoaks	3,113	Self-contained first floor office with on site parking. Available to sub-let or by assignment.







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	5 Victoria Road, Sevenoaks	1,200	Open plan, ground floor space with CAT II spec lighting, perimeter trunking and carpeting. Quoting £20.80 psf.
	116 High Street, Sevenoaks	755	First floor self-contained office space in the town centre with 2 parking spaces. Rent on application.
	Wellington Gate, Church Road, Tunbridge Wells	4,000	Modern specification offices with four pipe fan coil air-conditioning, two x 10 person passenger lifts, fully accessible carpeted metal raised floors; marble floored entrance lobby and ample parking. Quoting terms on application.
	Wallside House, 12 Mount Ephraim Road, Tunbridge Wells	7,544	Detached period office building with 34 on site car parking spaces, lifts and modern fit-out. Rent on application.
	Corn Exchange House, The Pantiles, Tunbridge Wells	1,822	Self-contained first and second floor offices in a period office building. Quoting rent £12.00 psf.
	Royal Victoria House, Lower Pantiles, Tunbridge Wells	1,330	Ground floor open plan offices in Grade II listed office building overlooking The Pantiles. Rent on application.
	Prospect House, 11-13 Lonsdale Gardens, Tunbridge Wells	Suites from 335 to 1650	A range of office suites available for £21.50 psf.
	1-3 Nevill Estate Yard, ErIDGE (Tunbridge Wells)	3,675	Period former sawmill having converted to provide open plan offices with basement and sotorage. 20 parking spaces on site. Small rural business park situated directly fronting the A26. Quoting £12.25 psf.

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	Chapman House, Chapman Way, Tunbridge Wells	3,610	Open plan office space arranged two floors with a self-contained entrance. Parking for 16 cars. Quoting £7.50 psf.
	B4 Speldhurst Business Park, Langton Road, Speldhurst (Tunbridge Wells)	700	Fully self-contained open-plan office on rural business park. Quoting £12.85 psf.
	Foundation House, Coach & Horses Passage, Lower Pantiles, Tunbridge Wells	601	Modern open-plan offices with lifts and ample parking. Quoting £15.00 psf.
	86 Mount Pleasant Road, Tunbridge Wells	889	Modern open plan offices arranged over first, second and third floors of a Grade II Listed building situated in the town centre. Quoting £13.50 psf.
	Spa House, 18 Upper Grosvenor Road, Tunbridge Wells	2,504	Detached office building quoting £795,000 for the freehold.
	First & Second Floor Offices, 45 High Street, Tunbridge Wells	1,024	High street offices quoting £14.65 psf.
	Oxford House, Mount Ephraim Road, Tunbridge Wells	1,460	Second floor office Suite in central location with 2 car parking space. Quoting £18.00 psf.

	<p>Bank House, 22-24 Garden Street, Tunbridge Wells</p>	<p>9,200</p>	<p>Town centre office building with Parking quoting £2.2m for the freehold.</p>
	<p>Oakhurst House, Mount Ephraim, Tunbridge Wells</p>	<p>5,400</p>	<p>GF office suite to be refurbished and ready in March 2016. 27 Car Parking Spaces. Rent on application.</p>
	<p>London Road, Southborough, Tunbridge Wells</p>	<p>900</p>	<p>Self-contained office building. Quoting £16.60 psf.</p>
	<p>20-26 St Johns Road, Northfields, Tunbridge Wells</p>	<p>8,000</p>	<p>Open plan offices with on-site parking, near to the town centre. Rent on application.</p>

**Appendix D Current Office Availability in Sevenoaks and Tunbridge Wells<sup>1</sup>**

<sup>1</sup> Local agents Michael Rodgers, Salisbury & Co, Ibbett Moseley, Durlings, Bracketts, Broadlands

## **Appendix 2: List of Recent Office Lettings**

Date	Address	Size (sq ft)	Annual rent (£psf)	Rent Type	Term	Break Date	Review Date	Rent Free
Dec-15	116A High St, Sevenoaks	679	21.18	Effective	5 yrs	03/12/2018		0
Oct-15	Chevening Rd, Sevenoaks	1,748	16.89	Effective	5 yrs			4
Sep-15	8 Pembroke, Sevenoaks	8,906	21.00	Achieved	10 yrs			
Aug-15	50-52 London Rd, Sevenoaks	1,750	20.58	Effective	5 yrs	02/08/2018		4
Jul-15	77 High St, Sevenoaks	526	16.13	Effective	5 yrs	30/07/2017		3
Jul-15	65A London Rd, Sevenoaks	385	18.18	Achieved	10 yrs		19/07/2020	0
Jun-15	Main Rd, Sevenoaks	5,658	21.50	Asking				
May-15	94-94A High St, Sevenoaks	470	21.28	Achieved	5 yrs	30/04/2018		0
Apr-15	26 Market Sq, Westerham	1,230	15.04	Achieved	5 yrs	29/04/2018		1
Mar-15	26 Market Sq, Westerham	922	15.25	Effective	6 yrs	30/03/2018		
Mar-15	7 Oakhill Rd, Sevenoaks	14,006	20.30	Achieved	5 yrs			
Feb-15	4A Brewery Ln, Sevenoaks	1,000	22.50	Asking	5 yrs	26/02/2018		1
Feb-15	26 Market Sq, Westerham	373	16.09	Achieved	4 yrs	31/01/2017	31/01/2017	
Feb-15	1 Suffolk Way, Sevenoaks	3,670	23.00	Asking				
Jan-15	Chevening Rd, Sevenoaks	906	18.76	Achieved	5 yrs			

Jan-15	69C London Rd, Sevenoaks	1,088	16.08	Achieved	10 yrs	14/01/2020	14/01/2020	6
Dec-14	Squerryes, Westerham	1,275	17.25	Asking				
Nov-14	26 Market Sq, Westerham	1,202	14.98	Achieved	6 yrs	18/12/2018	18/12/2018	
Nov-14	Goodley Stock Rd, Westerham	1,845	11.38	Effective	5 yrs			0
Nov-14	Vestry Rd, Sevenoaks	2,100	12.00	Achieved	1 yr 2 mos			
Oct-14	Market Sq, Westerham	1,743	12.47	Achieved	10 yrs	20/10/2019	20/10/2019	
Sep-14	Fircroft Way, Edenbridge	1,435	5.00	Asking				
Sep-14	London Rd, Westerham	2,208	15.00	Asking				
Sep-14	London Rd, Westerham	2,476	19.03	Effective	5 yrs			
Jun-14	1 Suffolk Way, Sevenoaks	4,975	21.00	Asking				
May-14	Chevening Rd, Sevenoaks	1,824	17.54	Achieved	10 yrs	29/05/2019	29/05/2019	3
May-14	160 London Rd, Sevenoaks	5,275	21.50	Achieved	10 yrs	15/05/2019	15/05/2019	12
May-14	Watery Ln, Sevenoaks	986	11.27	Effective	5 yrs	31/05/2017		2
Apr-14	Vestry Rd, Sevenoaks	586	10.00	Achieved	1 yr 8 mos			
Apr-14	1-5 London Rd, Swanley	1,667	8.91	Effective	5 yrs	31/03/2017		9

<i>Date</i>	<i>Address</i>	<i>Size (sq ft)</i>	<i>Annual rent (£psf)</i>	<i>Rent Type</i>	<i>Term</i>	<i>Break Date</i>	<i>Review Date</i>	<i>Expiry Date</i>	<i>Rent Free</i>	<i>Tenant</i>
Dec-15	116A High St, Sevenoaks	679	21.18	Effective	5 yrs	03/12/2018		03/12/2020	0	Liquid Vision Enterprise Ltd
Nov-15	London Rd, Swanley	1,332	13.91	Effective	5 yrs	23/12/2018	23/12/2018	23/12/2020	3	No Letting Go inventory Management Ltd
Oct-15	Chevening Rd, Sevenoaks	1,748	16.89	Effective	5 yrs			29/10/2020	4	Michael Rogers
Oct-15	Hill Hoath Rd, Edenbridge	1,460	11.98	Asking						
Sep-15	8 Pembroke, Sevenoaks	8,906	21.00	Achieved	10 yrs			28/09/2025		Elkington and Fife LLP
Aug-15	50-52 London Rd, Sevenoaks	1,750	20.58	Effective	5 yrs	02/08/2018		02/08/2020	4	Wellers
Jul-15	77 High St, Sevenoaks	526	16.13	Effective	5 yrs	30/07/2017		30/07/2020	3	Rikama Education Ltd
Jul-15	65A London Rd, Sevenoaks	385	18.18	Achieved	10 yrs		19/07/2020	19/07/2025	0	Old Basket Supply Ltd (The)
Jun-15	London Rd, Swanley	840	12.00	Achieved	5 yrs	21/06/2017		21/06/2020	0	Keylon Interiors Ltd
Jun-15	Main Rd, Sevenoaks	5,658	21.50	Asking						
May-15	94-94A High St, Sevenoaks	470	21.28	Achieved	5 yrs	30/04/2018		30/04/2020	0	
Apr-15	26 Market Sq, Westerham	1,230	15.04	Achieved	5 yrs	29/04/2018		29/04/2020	1	Logic Investment Limited
Apr-15	Westerham Rd, Westerham	1,494	11.37	Asking						
Apr-15	Chequers HI, Edenbridge	1,311	18.89	Asking						
Apr-15	Market Sq, Westerham	1,152	12.50	Asking						

Mar-15	26 Market Sq, Westerham	922	15.25	Effective	6 yrs	30/03/2018		30/03/2021		Architects Plus Limited
Mar-15	7 Oakhill Rd, Sevenoaks	14,006	20.30	Achieved	5 yrs			01/06/2020		
Mar-15	London Rd, Swanley	1,326	11.99	Asking						
Feb-15	4A Brewery Ln, Sevenoaks	1,000	22.50	Asking	5 yrs	26/02/2018		26/02/2020	1	Sound Oil PLC
Feb-15	26 Market Sq, Westerham	373	16.09	Achieved	4 yrs	31/01/2017	31/01/2017	01/02/2019		DataWeaver International
Feb-15	1 Suffolk Way, Sevenoaks	3,670	23.00	Asking						Credence Background Screening Ltd
Jan-15	Chevening Rd, Sevenoaks	906	18.76	Achieved	5 yrs			27/01/2020		Frontline Performance UK Ltd
Jan-15	69C London Rd, Sevenoaks	1,088	16.08	Achieved	10 yrs	14/01/2020	14/01/2020	14/01/2025	6	
Dec-14	Squerryes, Westerham	1,275	17.25	Asking						
Nov-14	26 Market Sq, Westerham	1,202	14.98	Achieved	6 yrs	18/12/2018	18/12/2018	18/12/2020		Thornhill Administration Limited
Nov-14	Goodley Stock Rd, Westerham	1,845	11.38	Effective	5 yrs			07/12/2019	0	
Nov-14	Vestry Rd, Sevenoaks	2,100	12.00	Achieved	1 yr 2 mos			31/12/2015		Blue Motor Finance Ltd
Oct-14	Market Sq, Westerham	1,743	12.47	Achieved	10 yrs	20/10/2019	20/10/2019	20/10/2024		Continental Wood Products Ltd
Oct-14	24 Market Sq, Westerham	1,504	12.50	Asking						
Sep-14	Enterprise Way, Edenbridge	2,476								



Sep-14	Fircroft Way, Edenbridge	1,435	5.00	Asking							
Sep-14	London Rd, Westerham	2,208	15.00	Asking							
Sep-14	London Rd, Westerham	2,476	19.03	Effective	5 yrs			05/10/2019			Five Arrows Business Finance Ltd
Jul-14	Main Rd, Edenbridge	1,079	8.34	Asking							
Jun-14	1 Suffolk Way, Sevenoaks	4,975	21.00	Asking							Active Assistance Limited
May-14	Chevening Rd, Sevenoaks	1,824	17.54	Achieved	10 yrs	29/05/2019	29/05/2019	29/05/2024	3		Target Finders Limited
May-14	160 London Rd, Sevenoaks	5,275	21.50	Achieved	10 yrs	15/05/2019	15/05/2019	15/05/2024	12		Trans Global Projects Ltd
May-14	Watery Ln, Sevenoaks	986	11.27	Effective	5 yrs	31/05/2017		31/05/2019	2		Communication Design Partnership Limited
Apr-14	Vestry Rd, Sevenoaks	586	10.00	Achieved	1 yr 8 mos			31/12/2015			LTA Collections Group Limited
Apr-14	1-5 London Rd, Swanley	1,667	8.91	Effective	5 yrs	31/03/2017		31/03/2019	9		Plantinum Solutions Limited

Date	Address	Size (sq ft)	Annual rent (£psf)	Rent Type	Term	Break Date	Review Date	Expiry Date	Rent Free	Tenant
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Jul-15	77 High St, Sevenoaks	526	16.13	Effective	5 yrs	30/07/2017		30/07/2020	3	Rikama Education Ltd
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Jun-15	Main Rd, Sevenoaks	5,658	21.50	Asking						
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Apr-15	26 Market Sq, Westerham	1,230	15.04	Achieved	5 yrs	29/04/2018		29/04/2020	1	Logic Investment Limited
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Feb-15	1 Suffolk Way, Sevenoaks	3,670	23.00	Asking						Credence Background Screening Ltd
Jan-15	Chevening Rd, Sevenoaks	906	18.76	Achieved	5 yrs			27/01/2020		Frontline Performance UK Ltd
Jan-15	69C London Rd, Sevenoaks	1,088	16.08	Achieved	10 yrs	14/01/2020	14/01/2020	14/01/2025	6	
Dec-14	Squerryes, Westerham	1,275	17.25	Asking						

Nov-14	26 Market Sq, Westerham	1,202	14.98	Achieved	6 yrs	18/12/2018	18/12/2018	18/12/2020		Thornhill Administration Limited
Nov-14	Goodley Stock Rd, Westerham	1,845	11.38	Effective	5 yrs			07/12/2019	0	
Nov-14	Vestry Rd, Sevenoaks	2,100	12.00	Achieved	1 yr 2 mos			31/12/2015		Blue Motor Finance Ltd
Oct-14	Market Sq, Westerham	1,743	12.47	Achieved	10 yrs	20/10/2019	20/10/2019	20/10/2024		Continental Wood Products Ltd
Oct-14	24 Market Sq, Westerham	1,504	12.50	Asking						
Sep-14	Enterprise Way, Edenbridge	2,476								
Sep-14	Fircroft Way, Edenbridge	1,435	5.00	Asking						
Sep-14	London Rd, Westerham	2,208	15.00	Asking						
Sep-14	London Rd, Westerham	2,476	19.03	Effective	5 yrs			05/10/2019		Five Arrows Business Finance Ltd
Jul-14	Main Rd, Edenbridge	1,079	8.34	Asking						
Jun-14	1 Suffolk Way, Sevenoaks	4,975	21.00	Asking						Active Assistance Limited
May-14	Chevening Rd, Sevenoaks	1,824	17.54	Achieved	10 yrs	29/05/2019	29/05/2019	29/05/2024	3	Target Finders Limited
May-14	160 London Rd, Sevenoaks	5,275	21.50	Achieved	10 yrs	15/05/2019	15/05/2019	15/05/2024	12	Trans Global Projects Ltd
May-14	Watery Ln, Sevenoaks	986	11.27	Effective	5 yrs	31/05/2017		31/05/2019	2	Communication Design Partnership Limited
Apr-14	Vestry Rd, Sevenoaks	586	10.00	Achieved	1 yr 8 mos			31/12/2015		LTA Collections Group Limited
Apr-14	1-5 London Rd, Swanley	1,667	8.91	Effective	5 yrs	31/03/2017		31/03/2019	9	Plantinum Solutions Limited

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<i>Date</i>	<i>Address</i>	<i>Size (sq ft)</i>	<i>Annual rent (£psf)</i>	<i>Rent Type</i>	<i>Term</i>	<i>Break Date</i>	<i>Review Date</i>	<i>Expiry Date</i>	<i>Rent Free</i>
Jan-16	Coach And Horses Psge, T Wells	1,515	13.20	Asking					
Nov-15	2-6 Lonsdale Gdns, T Wells	1,350							
Nov-15	10-12 Garden St, T Wells	1,278	16.43	Asking					
Jun-15	Lamberhurst Down, T Wells	4,069	11.30	Achieved	5 yrs	21/05/2018		31/05/2020	0
May-15	Lamberhurst Down, T Wells	1,401	11.42	Achieved	10 yrs	21/05/2018		21/05/2025	3
Feb-15	53-55 Calverley Rd, T Wells	2,000	13.00	Achieved	5 yrs 6 mos	31/07/2017		31/07/2020	6
Feb-15	7-9 Church Rd, T Wells	3,900	18.00	Asking					
Feb-15	7-9 Church Rd, T Wells	1,823	18.00	Asking					
Feb-15	7-9 Church Rd, T Wells	2,000	18.00	Asking					
Jan-15	Tong Ln, T Wells	2,146	13.05	Achieved	5 yrs	01/03/2018		01/03/2020	0
Oct-14	The Pantiles, T Wells	1,157	15.99	Asking					
Sep-14	12 Montacute Rd, T Wells	1,144	13.11	Asking					
Jul-14	90 Calverley Rd, T Wells	1,189	9.50	Asking					
Jul-14	90 Calverley Rd, T Wells	2,357	9.50	Asking					
Apr-14	3 Calverley St, T Wells	1,800	15.55	Asking					
Apr-14	72 Grosvenor Rd, T Wells	1,572	11.29	Asking					
Apr-14	19 Mount Ephraim Rd, T Wells	1,670	11.97	Asking					
Apr-14	19 Mount Ephraim Rd, T Wells	4,270	15.92	Asking					
Mar 14	16 Grove Hill Rd, T Wells	1,809	5.53	Achieved	1 yr 9 mos	04/01/2015		04/12/2015	

## **Appendix 3: List of Recent Industrial Lettings**

Date	Address	Size (sq ft)	Annual rent (£psf)	Rent Type	Term	Break Date	Review Date	Rent Free
Aug-15	Old London Rd Sevenoaks	2,100	5.23	Asking				
Aug-15	Old London Rd Sevenoaks	2,170	5.52	Asking				
Jul-15	Fircroft Way Edenbridge	1,531	5.00	Asking				
Jun-15	Gabriel Spring Rd Longfield	1,100	9.27	Effective	3 yrs			
Apr-15	Fircroft Way Edenbridge	1,880	5.00	Asking				
Mar-15	Park Rd Swanley	1,595	8.50	Asking				
Dec-14	London Rd Swanley	11,608	7.25	Asking				
Dec-14	Pilgrims Way Sevenoaks	2,135	7.50	Asking				
Nov-14	Park Rd Swanley	1,728	7.81	Asking				
Nov-14	The Flyers Way Westerham	1,230	10.22	Asking				
Oct-14	Vestry Rd Sevenoaks	4,035	7.54	Effective	5 yrs			3
Sep-14	The Flyers Way Westerham	8,123	5.00	Asking				
Sep-14	The Flyers Way Westerham	8,562	5.00	Asking				
Jul-14	The Flyers Way Westerham	995	12.01	Asking				

Jul-14	The Flyers Way Westerham	1,263	10.05	Asking				
May-14	Noahs Ark Sevenoaks	4,910			10 yrs	15/05/2019	15/05/2019	
May-14	Hodsoll St Sevenoaks	1,063	6.58	Asking				
Mar-14	Old London Rd Sevenoaks	3,200	4.69	Asking				
Mar-14	Old London Rd Sevenoaks	2,100	5.24	Asking				
Mar-14	Park Rd Swanley	1,195	8.50	Asking				
Feb-14	Scratchers Ln Longfield	2,568	8.96	Asking				

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Date	Address	Size (sq ft)	Annual Rent (£psf)	Rent Type	Term	Break Date	Review Date	Rent Free
Jan-16	Eldon Way Paddock Wood	1,607	7.00	Asking				
Dec-15	Eldon Way Paddock Wood	6,400	6.00	Asking				
Dec-15	Eldon Way Paddock Wood	6,400	6.00	Asking				
Dec-15	Paddock Wood	4,650	6.00	Asking				
Dec-15	Kingstanding Way Tunbridge Wells	2,555	9.00	Asking				
Dec-15	Longfield Rd Tunbridge Wells	500	15.00	Asking				
Oct-15	North Farm Rd Tunbridge Wells	6,166	7.30	Asking				
Sep-15	Goudhurst Rd Tunbridge Wells	195	12.30	Asking				
Sep-15	Transfesa Rd Paddock Wood	11,040	6.52	Asking				
Aug-15	North Farm Tunbridge Wells	34,500	4.52	Achieved	25/08/2020	25/08/2020	10 yrs	
Jul-15	Chapman Way Tunbridge Wells	2,264	7.51	Asking				
Jul-15	Longfield Rd Tunbridge Wells	500	13.00	Asking				
Jul-15	Maidstone Rd Tunbridge Wells	1,545	7.11	Asking				
May-15	Eldon Way Paddock Wood	2,370	6.00	Asking			10 yrs	
May-15	6-8 Mereworth Rd Tunbridge Wells	470	12.23	Asking				



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Apr-15	Eldon Way Paddock Wood	4,650	6.00	Effective			10 yrs	
Mar-15	Mount Ephraim Tunbridge Wells	936	7.48	Asking				
Mar-15	Kingstanding Way Tunbridge Wells	2,553	8.81	Asking				
Jan-15	Lamberts Rd Tunbridge Wells	11,238	2.76	Achieved	12/04/2020	12/04/2020	10 yrs	
Jan-15	Longfield Rd Tunbridge Wells	1,170	10.56	Asking				
Nov-14	Eldon Way Paddock Wood	3,300	5.88	Asking				
Oct-14	Eldon Way Paddock Wood	3,223	6.02	Asking				
Oct-14	Cryals Rd Matfield	7,020	5.70	Asking				
Oct-14	Kingstanding Way Tunbridge Wells	2,572	8.75	Asking				
Oct-14	Kingstanding Way Tunbridge Wells	1,865	9.65	Asking				
Oct-14	2 Silverdale Ln Tunbridge Wells	1,650	5.15	Asking				
Aug-14	Transfesa Rd Paddock Wood	12,515	4.95	Achieved	28/09/2016		4 yrs	
Aug-14	Eastlands Ln Paddock Wood	4,627	6.48	Asking			5 yrs 4 mos	
Aug-14	St Johns Rd Tunbridge Wells	647	8.50	Asking				
Aug-14	Transfesa Rd Paddock Wood	7,344	4.95	Achieved	28/02/2017	28/02/2017	7 yrs 7 mos	
Jun-14	Eldon Way Paddock Wood	11,950	6.53	Achieved			10 yrs	

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Mar-14	Longfield Rd Tunbridge Wells	2,314	9.50	Asking				
Mar-14	Longfield Rd Tunbridge Wells	495	13.13	Asking				
Mar-14	1 Stag Rd Tunbridge Wells	4,932	6.49	Asking				
Feb-14	Transfesa Rd Paddock Wood	9,800	3.80	Achieve d			3 yrs	

## **Appendix 4: Stakeholder Workshop Notes**

# Briefing

## Sevenoaks and Tunbridge Wells Economic Needs Study

### Sevenoaks Stakeholder Workshop – Discussion Notes

March 2016

#### **Introduction**

1. This briefing note provides a summary of the key discussion points arising from the Economic Needs Study Stakeholder Workshop held in Sevenoaks district on Friday 18<sup>th</sup> March 2016.
2. The workshop comprised two presentations followed by facilitated discussions focussed around the following questions:

#### **Discussion 1**

- What observations do you have regarding the scope and approach to the research? Do you agree with the emerging findings?
- What, if any, other specific aspects of the economy and commercial market over recent years should be taken into account?
- What do you consider to be the areas main economic strengths?
- Historically, what have been the key weaknesses; factors that have acted as barriers / constraints to growth and business investment?
- What opportunities exist to capture more growth and business investment? What do you consider to be the key drivers of economic growth and development in the future?
- What are the main threats facing the Sevenoaks and wider West Kent economy?

#### **Discussion 2**

- Do you think the scale of growth and key growth sectors identified in the EEFM is representative of the Sevenoaks district economy?
  - What do you consider to be the key drivers of future growth for Sevenoaks district?
  - Are there any other drivers of growth (e.g. other projects and investments) that have the potential to influence the scale of employment change in particular sectors?
  - What supporting infrastructure or other interventions are required to support this level of growth and unlock future economic development?
3. Feedback from the group discussions is summarised below.

## Discussion 1

### Observations of scope / approach

- General agreement that key trends and drivers had been recognised overall in the study.
- Noted that presentation did not contain information on the retail sector, which is seen as a key driver of the local economy.
- Absence of information on how rail connections influence the economy, with view shared that this should be more of a focus given the strong link with London.
- Clarification requested on confidence intervals and suggestion that information not yet captured should be acknowledged.
- Question regarding how businesses have been engaged with study to date.

### Strengths

- Strategic location of Sevenoaks district seen as a key strength, with the proximity to London regularly referenced as a positive driver of the local economy.
- Strong transport infrastructure in place, in relation to both the road and rail networks.
- The district's reputation as an attractive and desirable place to live and work, based on the environment, the quality and value of the housing stock, the area's schools and upgraded retail offer. This can serve to attract both businesses and labour.
- Highly skilled population and labour force supports businesses, while homeworking is also prevalent where communications infrastructure is in place.
- Significant number of micro-businesses in Sevenoaks district suggest that local economy is supportive of businesses of all sizes.

### Weaknesses

- The shortage of commercial sites and premises was highlighted as a key weakness, with low commercial availability.
- While the communications infrastructure is strong in places, attendees felt that there were significant connectivity issues in more rural areas of the district, with broadband reliability, capacity and speed cited as key issues.
- Limited connections to motorway network a weakness, with few access points to the M25 and M26.
- Age demographic of the area skewed by affordability factors, with high house prices limiting the district's attractiveness to working age people. It was noted that this varied throughout Sevenoaks district, with Swanley seen as a more affordable location.
- Comment on perceived imbalance towards Sevenoaks town centre, which is constrained by traffic issues, including congestion and parking. This influences visitors, employees and the local population and is a weakness in the local economy.

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- Environmental designations such as Green Belt have historically acted as a barrier to grow and business investment.
- Skills shortage in some jobs, particularly in relation to nursing homes, health and dentistry.
- Some attendees of the view that the rural economy was not sufficiently supported.
- Sevenoaks town lacking tourist accommodation and a night-time economy, restricting economic growth in these sectors.

### **Opportunities**

- Improvements to public transport connectivity, with the expansion of the Oyster to Swanley connecting parts of the district to the Transport for London network. There is also a further opportunity to exploit north-south rail connections in Sevenoaks district and the area's proximity to the Channel Tunnel.
- The relative affordability of commercial space in Sevenoaks district could attract businesses from other more expensive locations such as London.
- A potential review of the Green Belt could unlock new development sites, with some attendees feeling that a positive approach needs to be taken to understand what can be done in the Green Belt, rather than what cannot. There is also an opportunity to upgrade buildings in the Green Belt.
- Wider growth in sectors where Sevenoaks district is perceived to be well-positioned to capitalise, such as logistics, energy and renewables, tourism and tech start-ups.
- Development of new commercial stock to north presents opportunity, with further development opportunities at motorway junctions.
- Opportunity for growth of micro-businesses to increase contribution to local economy.
- Potential diversification of rural economy and provision of more live-work units.
- Opportunity for wealth creation in Swanley, based on the area's relative affordability.

### **Threats**

- Substantial need for housing, resulting in competing demands for space between housing and commercial uses. This is particularly important in the context of permitted development rights to change offices to residential use, with the high housing land values often pricing businesses out of the market and creating pressure on existing employment sites.
- Demographic factors, including the ageing population which can reduce the size of the local labour force, coupled with a further loss of younger working age people. Some felt that there was only a limited capacity for population growth, with the worsening affordability of housing an ongoing threat.
- Finite supply of land for employment uses due to constraints such as AONB, heritage assets and Green Belt.

- Significant competition between different locations, with a risk that ‘doing nothing’ would see the local economy fall behind its competitors.
- National policy changes could impact upon the supply of employment land in the district.
- The public and business perception of different locations can threaten the development of local economies within Sevenoaks.
- Development viability and vitality can be an issue in rural areas.

### **Discussion 2**

#### **Scale and drivers of growth**

- Many attendees felt that the district was well-positioned to secure future job growth which is higher than achieved historically, and there was therefore some surprise that the forecasts presented fell below historic trends. Clarity was sought on why this is the case, recognising that such forecasts can be open to scrutiny.
- View that stronger level of ‘transformational’ growth was needed in the local economy.
- Observations on the specific contribution of different sectors, with an apparent disconnect between the historic performance of sectors and their forecast change. The forecast decline in health and care was highlighted and questioned in light of the district’s ageing population.
- Growth in the population of Sevenoaks district could drive demand for health and education sectors, although this could be tempered by the scale of public sector spending at a national level.
- Professional services could grow as a result of increased flexible working, presenting an opportunity for future growth in this sector. Other wider trends could also influence economic growth in Sevenoaks district, including increased automation and a growth in homeworking, which reduces the space required to accommodate employees.
- The construction sector could be boosted if the rate of housing development increases in line with the objectively assessed need for housing in the district. However, some felt that the forecast contribution of this sector appeared high.
- Limited locations for large offices in Kent in response to latent demand.
- Development in specific locations can drive economic growth in Sevenoaks. Fort Halstead was specifically referenced as a location potentially suitable for research and development uses, with clarity sought on the future role of other major developed sites within the Green Belt. There is also a growth opportunity in Swanley, with a masterplan assessing the potential for growth and opportunities related to logistics, for example, while there is also potential for a rural employment hub.
- Perceived market appetite for industrial uses in the area.
- Acknowledgement that Sevenoaks district currently has perceived strengths and weaknesses in relation to specific sectors, resulting in the development of clusters which can shape future demand and self-perpetuate.

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- Instances of businesses upskilling staff to ensure that their business requirements can be met in their preferred locations.
- Economic development in Sevenoaks influenced by growth in neighbouring areas, recognising that the district operates within a competitive economy.

### **Supporting infrastructure and other interventions**

- Need for additional sites and premises in response to latent demand from both small and large businesses – potential locations outside of Sevenoaks town could be considered including Swanley, Edenbridge and Westerham.
- Investment in transport would be welcomed, including additional parking facilities, motorway access and wider roads to accommodate heavy goods vehicles. This can increase the attractiveness of the district as a business location and unlock sectors and locations within the district.
- Future decision on airport expansion cited as an intervention which could influence the Sevenoaks economy, and the future Thames crossing could also have an effect, particularly in reducing congestion.
- Need to improve digital connectivity, with broadband regularly cited by attendees as infrastructure necessary to support the local economy.
- Education and skills, with the limited further education opportunities in the district potentially restricting the extent to which labour can support higher end growth in Sevenoaks.
- Continued investment in schools would also be welcomed.
- Availability of affordable housing in district a key factor in growing the labour force and supporting growth in the working age population.

#### **Contact**

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March 2016

SEVP3001



## Appendix 5: SIC Sector to Use Class Assumptions

In assigning SIC sectors to use classes, consideration has been given to the employment land module inbuilt within the EEFM 2014, which applies assumptions on employment in B and non-B uses based on a detailed review of individual SIC codes and analysis of employment by sector in the East of England based on BRES data<sup>110</sup>.

This does, however, highlight that there is no exact science to allocating forecast jobs to types of employment space, and this assessment has therefore drawn upon the EEFM assumptions with adjustments to reflect the local context of Sevenoaks and Tunbridge Wells. This is primarily based on analysis of BRES 2014 data for the two authorities, which provides further detail on the weighting of employment within Oxford Economics' broad sectors and the implications for the type of jobs likely to be created over the plan period, and the subsequent type of employment space required.

	SIC	B1a/b	B1c/B2	B8	Non-B
Agriculture	01 – 03	0%	0%	0%	100%
Mining and quarrying	05 – 09	0%	0%	0%	100%
Food manufacturing	10 – 12	0%	100%	0%	0%
General manufacturing	13 – 18, 31 – 33	0%	100%	0%	0%
Chemicals exc pharma	19, 20, 22, 23	0%	100%	0%	0%
Pharmaceuticals	21	0%	100%	0%	0%
Metals manufacturing	24, 25	0%	100%	0%	0%
Transport equipment & machinery	28 – 30	0%	100%	0%	0%
Electronics	26, 27	0%	0%	100%	0%
Utilities	35 – 37	0%	0%	0%	100%
Waste and remediation	38, 39	0%	97%	0%	3%
Construction	41 – 43	0%	0%	5%	95%
Wholesale	45, 46	10%	30%	60%	0%
Retail	47	0%	0%	0%	100%
Land transport	49, 52, 53	0%	0%	75%	25%
Water and air transport	50, 51	0%	0%	0%	100%
Hotels and restaurants	55, 56	0%	0%	0%	100%
Publishing and broadcasting	58 – 60	62%	15%	23%	0%
Telecoms	61	40%	20%	20%	20%

<sup>110</sup> Oxford Economics (2015) East of England Forecasting Model – Technical Report

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	SIC	B1a/b	B1c/B2	B8	Non-B
Computer related activity	62, 63	95%	0%	5%	0%
Finance	64 – 66	100%	0%	0%	0%
Real estate	68	80%	0%	0%	20%
Professional services	69 – 71, 73 – 75	100%	0%	0%	0%
Research and development	72	100%	0%	0%	0%
Business services	77, 79 – 82	50%	0%	0%	50%
Employment activities	78	23%	25%	10%	42%
Public administration	84	61%	0%	0%	39%
Education	85	0%	0%	0%	100%
Health and care	86 – 88	0%	0%	0%	100%
Arts and entertainment	90 – 93	0%	0%	0%	100%
Other services	94 – 99	0%	0%	0%	100%

# Appendix 6: Employment Site Location Plans



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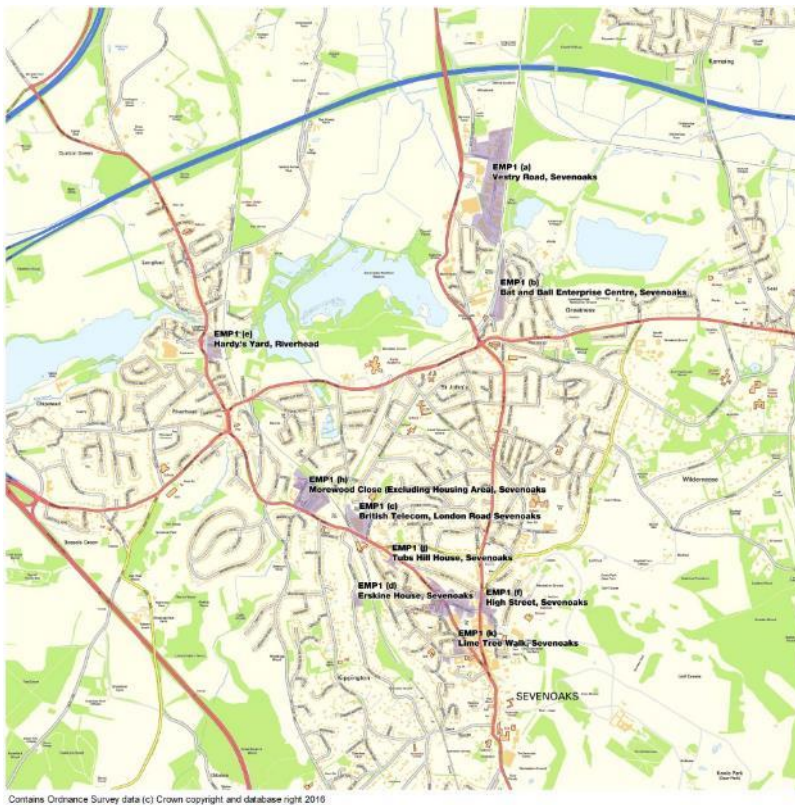
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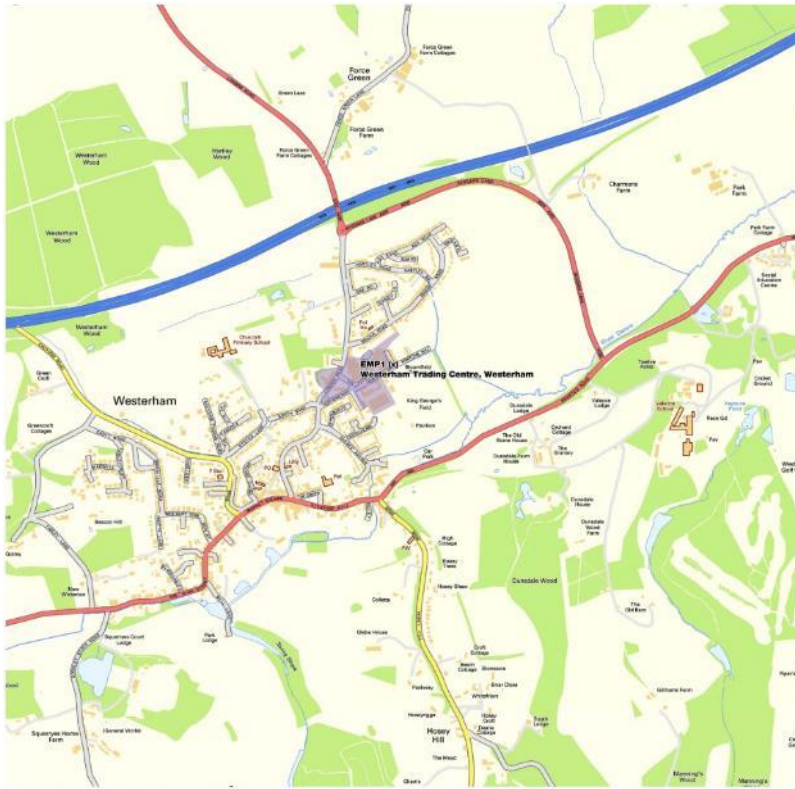
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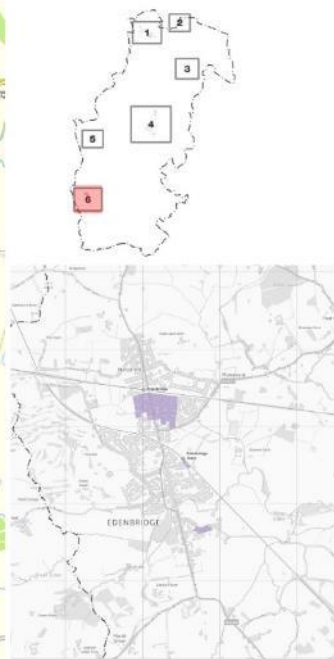
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## **Appendix 7: Site Appraisal Proformas**

These proformas can be found in a separate document

## **Appendix 8: Site Scoring Matrix**



Type	Policy Ref	Turley/Colliers Reference	Settlement	Site name	Postcode	Site Area	Suitability and Market Attractiveness Factors												Score	Overall Quality and Attractiveness Rating (good, adequate, poor)	Recommendation (Allocate, Retain, Monitor, Consider for Release)	Suitable uses	
							1. Location	2. Strategic access	3. Site/premises condition	4. Availability	5. Land ownership	6. Market activity / developer interest	7. Suitability for growth	8. Development constraints	9. Need for investment	10. Viability	11. Neighbouring uses	12. Importance to Economic Development Activities					
Employment Allocation		S_EA1	Sevenoaks	British Telecom, London Road Sevenoaks	TN13 1BT	1.76	5	5	5	5	3	1	3	3	5	5	3	5	44	Good	Retain	B1	
Employment Allocation		S_EA2	Sevenoaks	Tubs Hill House, Sevenoaks	TN13 1BL	0.41	Conversion to residential ongoing												0				
Employment Allocation		S_EA3	Sevenoaks	Erskine House, Sevenoaks	TN13 1NW	0.46	5	3	5	3	3	1	3	3	3	5	5	3	3	42	Adequate	Retain	B1
Employment Allocation		S_EA4	Sevenoaks	High Street, Sevenoaks	TN13 1HU	1.45	5	5	5	5	3	3	3	3	5	5	3	5	50	Good	Retain	B1	
Employment Allocation		S_EA5	Sevenoaks	South Park, Sevenoaks	TN13 1EW	0.18	5	5	5	5	3	3	3	3	5	3	3	3	46	Good	Retain	B1	
Employment Allocation		S_EA6	Sevenoaks	Lime Tree Walk, Sevenoaks	TN13 1YH	0.00	5	3	5	1	3	5	3	3	3	5	3	3	42	Good	Retain	B1	
Employment Allocation		S_EA7	Swanley	The Technology Centre, Swanley	BR8 7AG	1.77	5	3	5	1	3	1	5	5	5	5	3	5	46	Good	Retain	B1, B2, B8	
Employment Allocation		S_EA8	Swanley	Swanley Town Council Offices, Swanley	BR8 7BU	0.35	5	3	3	3	5	1	3	3	3	1	3	1	34	Adequate	Retain	B1	
Employment Allocation		S_EA9	Swanley	Park Road Industrial Estate, Swanley	BR8 8AH	1.33	5	3	3	3	3	1	3	3	3	3	3	5	38	Adequate	Retain	B1, B2	
Employment Allocation		S_EA10	Edenbridge	Station Approach North, Edenbridge	TN8 5LS	0.45	5	1	3	5	3	3	3	1	1	3	5	1	34	Adequate	Monitor	B1, B2	
Employment Allocation		S_EA11	Swanley	Media House, Swanley	BR8 8HU	0.29	5	3	5	3	3	5	3	5	5	3	3	3	46	Good	Retain	B1	
Employment Allocation		S_EA12	Swanley	Horizon House, Swanley	BR8 8HY	0.33	Conversion to residential ongoing												0				
Employment Allocation		S_EA13	Swanley	Swan Mill, Goldsel Road, Swanley	BR8 8EU	2.62	5	3	5	1	3	1	3	3	5	5	3	5	42	Good	Retain	B1, B2	
Employment Allocation		S_EA14	Edenbridge	Station Road, Edenbridge	TN8 5ND	18.78	5	1	5	1	3	5	5	3	2	5	3	5	43	Good	Retain	B1, B2, B8	
Employment Allocation		S_EA15	Edenbridge	Edenbridge Trading Centre/ Warsop Trading Centre	TN8 5LD	1.64	5	1	1	5	3	1	1	3	1	1	3	1	26	Adequate	Monitor	B1, B2	
Employment Allocation		S_EA16	Riverhead	Hardy's Yard, Riverhead	TN13 2XP	1.25	5	3	5	3	3	3	3	5	1	1	5	1	38	Good	Retain	B1, B2	
Employment Allocation		S_EA17	Sevenoaks	Vestry Road, Sevenoaks	TN14 5EL	11.37	5	5	5	3	3	3	5	5	1	5	3	5	48	Good	Retain	B1, B2, B8	
Employment Allocation		S_EA18	Sevenoaks	Bat and Ball Enterprise Centre, Sevenoaks	TN14 5LJ	1.80	5	5	5	3	3	3	5	3	3	5	3	5	48	Good	Retain	B1, B2, B8	
Employment Allocation		S_EA19	Sevenoaks	Morewood Close (Excluding Housing Area), Sevenoaks	TN13 2HU	3.66	5	5	5	3	3	3	3	3	5	3	3	3	44	Good	Retain	B1, B2	
Employment Allocation		S_EA20	Swanley	Southern Cross Industrial Estate	BR8 8EE	1.89	5	5	3	3	3	3	5	3	3	5	5	5	48	Good	Retain	B1, B2, B8	
Employment Allocation		S_EA21	Swanley	Land at Broom Hill, Swanley	BR8 8DR	8.12	3	1	3	5	3	5	5	1	1	5	3	5	40	Good	Retain	B1, B8, C3	
Employment Allocation		S_EA22	West Kingsdown	West Kingsdown Industrial Estate, London Road, West Kingsdown	TN15 6EL	0.47	5	5	3	3	3	3	5	5	5	3	3	3	46	Good	Retain	B1, B2	
Employment Allocation		S_EA23	West Kingsdown	Blue Chalet Industrial Park, West Kingsdown	TN15 6BQ	0.88	5	5	3	3	3	3	5	5	5	3	3	3	46	Good	Retain	B1	
Employment Allocation		S_EA24	Westerham	Westerham Trading Centre, Westerham	TN16 1DE	3.70	5	5	5	1	3	3	5	3	5	3	3	5	46	Good	Retain	B1, B8	
Employment Allocation		S_EA25	South Darent	Horton Kirby Trading Estate, South Darent	DA4 9BD	0.81	3	3	5	3	3	3	3	3	5	3	3	5	42	Good	Retain	B1, B8	
Employment Allocation		S_EA26	Sevenoaks	London Road, Sevenoaks	TN13 1BH	3.97	5	5	5	1	2	3	3	5	5	5	5	5	49	Good	Retain	B1	
Employment Allocation		S_EA27	Swanley	Moreton Industrial Estate, Swanley	BR8 8DE	1.84	5	3	3	3	3	3	3	5	3	5	3	5	44	Good	Retain	B1, B8	
Employment Allocation		S_EA28	Swanley	Wested Lane Industrial Estate, Swanley	BR8 8TE	8.21	5	3	1	3	3	3	3	5	3	3	3	3	5	40	Good	Retain	B1, B2, B8
Employment Allocation		S_EA29	Swanley	Teardrop Industrial Estate	BR8 8TS	3.40	5	5	3	3	4	5	5	3	3	5	5	5	51	Good	Retain	B1, B2, B8	
Major Developed Employment Site		S_MDES1	Halstead	Fort Halstead	TN14 7BT	40.14	1	3	5	3	3	5	5	5	2	5	5	5	47	Good	Retain	B1, B2, B8	
Major Developed Employment Site		S_MDES2	Dunton Green	North Downs Business Park	TN13 2TL	6.07	1	3	5	3	3	3	5	3	5	5	5	5	46	Good	Retain	B1, B2, B8	
Major Developed Employment Site		S_MDES3	Kemsing	Chaucer Business Park	TN15 6NR	4.45	1	1	5	1	3	5	3	3	5	5	5	5	42	Good	Retain	B1, B2	



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Use Class	Description
A1	<b>Shops</b> e.g. Shops, retail warehouses, hairdressers, undertakers, travel agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes.
A2	<b>Financial and professional services</b> - Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices.
A3	<b>Restaurants and cafés</b> - For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.
A4	<b>Drinking establishments</b> - Public houses, wine bars or other drinking establishments (but not night clubs).
A5	<b>Hot food takeaways</b> - For the sale of hot food for consumption off the premises.
B1	<b>Business</b> (a) Offices (other than those that fall within A2), (b) research and development of products and processes, (c) light industry appropriate in a residential area.
B2	<b>General industrial</b> - Use for industrial process other than within class B1
B8	<b>Storage or distribution</b> - This class includes open air storage.
C1	<b>Hotels</b> - Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels).
C2	<b>Residential institutions</b> - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
C2a	<b>Secure Residential Institution</b> - Use for a provision of secure residential accommodation, including use as a prison, young offender's institution, detention centre, or use as a military barracks.
C3	<b>Dwellinghouses</b>
C4	<b>Houses in multiple occupation</b> - small shared dwelling houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.
D1	<b>D1 Non-residential institutions</b> - Clinics, health centres, day nurseries, day centres, schools, art galleries museums, libraries, halls, places of worship, church halls, law court. Non residential education and training centres.
D2	<b>Assembly and leisure</b> - Cinemas, music and concert halls, bingo and dance halls (but not night clubs), swimming baths, skating rinks, gymnasiums or area for indoor or outdoor sports and recreations
Sui Generis	<b>Sui Generis</b> - Certain uses do not fall within any use class and are considered 'sui generis'. Such uses include: theatres, scrap yards. Petrol filling stations and shops selling and/or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi businesses, amusement centres and casinos.

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**SEVENOAKS DISTRICT RETAIL STUDY**

**Planning Advisory Committee - 22 September 2016**

Report of Chief Planning Officer

Status: For Consideration

Key Decision: No

**Executive Summary:** The emerging Local Plan requires a new evidence base that will support the formation of new local planning policy. The Council first commissioned a Retail Study in 2007, and published an update in 2009. The Council has commissioned a new Retail Study for 2016, to understand the current position of town/neighbourhood centres, and how town/neighbourhood centres will evolve over the course of the new Plan period (up to 2035).

**Portfolio Holder** Cllr. Piper

**Contact Officer** Simon Taylor, Ext. 7134

**Recommendation to Planning Advisory Committee:**

To note the Retail Study as part of the evidence base for the new Local Plan.

**Reason for recommendation:** In order to produce appropriate town/neighbourhood centre and retail policies as part of the emerging Local Plan.

**Introduction and Background**

- 1 The Allocations and Development Management Plan (ADMP) was adopted in February 2015, and, together with the Core Strategy (adopted 2011), makes up the current Development Plan for the District. The Core Strategy was adopted prior to the Government’s National Planning Policy Framework (NPPF) being introduced and as such now contains some policies that are not consistent with the NPPF (i.e. the Council’s housing target and affordable housing policies).
- 2 The Council is therefore required to review its planning policies and the intention is to combine the two documents into a single Local Plan that contains up to date policies consistent with the NPPF.
- 3 The ADMP currently has policies relating to retail, town and neighbourhood centres which were found to be consistent with the NPPF. However, the last update to the Retail Study was undertaken in 2009, at the time of the Core Strategy examination (2010). This updated the 2007 Retail Study. As the

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Council has now committed to producing a new Local Plan, it is important that all evidence bases to support new local planning policy are updated, as it is widely accepted that Local Plans should be reviewed every five years, either in whole or in part (Local Plans Planning Practice Guidance and NPPF para. 158). This five year review is typically linked to a Local Authority's five year housing land supply (NPPF para 47). It must be noted that failure to update evidence whilst preparing a new Local Plan may compromise the robustness of the Plan when it is examined before a Government appointed Planning Inspector.

- 4 The findings of the 2007 Retail Study indicated that the District required approximately 11,000 sq. m of non-food floorspace and 5,140 sq. m of food floorspace for the period 2011-2026. The subsequent 2009 update concluded that the food floorspace require would remain unchanged, but non-food floorspace was reduced to 2,285 sq.m. The 2009 Update concluded that the reduction in non-food floorspace was due to the economic climate following the financial recession in 2008.

### **Procurement of the Retail Study and Methodology**

- 5 Firstly, it is important to note that subject to any further minor amendments, the reports presented in Appendices A to D in this report, is the final draft of the 2016 Retail Study.
- 6 The scope of the Retail Study 2016 was to identify the current and future provision for retail space within the District's town and neighbourhood centres. The Study would also take into account the impact of leisure and tourism on retail, as well as out-of-centre retail areas and national shopping trends (i.e. internet shopping, "click and collect"). In addition, the study has to ensure that the methodology and recommendations are consistent with the NPPF and Planning Practice Guidance to ensure that local planning policy is formulated to be in line with the principles and guidance of national retail planning policy (i.e. NPPF paragraphs 23 to 27).
- 7 A number of consultants were invited to tender for the Study. The Council commissioned consultants, GVA Bilfinger, to undertake the Retail Study in March 2016.
- 8 The methodology for the Retail Study included a number of telephone household surveys were carried out in May, as well as in-centre (face to face) surveys in specific centres that are defined within the Core Strategy:
  - Sevenoaks Town (Principal Town)
  - Swanley (Secondary Town)
  - Edenbridge (Rural Service Centre)
  - New Ash Green, Otford and Westerham (Local Service Centres)

- Service Villages (Brasted, Crockenhill, Eynsford, Farningham, Halstead, Hartley, Hextable, Horton Kirby, Kemsing, Knockholt Pound, Leigh, Seal, Sevenoaks Weald, Shoreham, South Darenth, Sundridge and West Kingsdown)
- 9 In total 1600 phone surveys were carried out across the survey area, as well as 200 in-centre surveys within the top six settlements within the District. Site visits to towns and villages were conducted as well as a desktop study of smaller villages and their retail provision.
- 10 GVA has extensive experience in providing recommendations for additional floorspace for both food and non-food uses. The methodology used to calculating the quantitative need includes:
- Using the latest population and expenditure forecasts to model projections over the study period;
  - Examining the existing retail supply from the household surveys and the market shares captured;
  - Factoring expected sales growth and existing commitments to retail floorspace within the District;
  - Consider whether overtrading of existing floorspace represents an additional source of quantitative need;

Further details of the methodology can be found in the Study's main report (Appendix A Chapter 6).

### **The Findings of the Retail Study**

- 11 Firstly, the publication of the Retail Study provides a starting point based on the latest statistics on population and expenditure used to work out the indicative floorspace requirements for the new Plan period, up to 2035. As an evidence base, the Retail Study will be examined in relation to other evidence bases gathered to determine the appropriate distribution and scale of retail floorspace required across the Sevenoaks District.
- 12 It is anticipated that the distribution of additional retail floorspace will reflect the current order of the existing Settlement Hierarchy (as set out in paragraph 7). However, any future planning policies will have to take into account market activity and viability, both independently and as a whole, and will be subject to public consultation before being submitted to the Government's Planning Inspectorate for examination.
- 13 National and sub-regional context
- a) The Retail Study provides a commentary on national and sub-regional market retail trends with a number of factors discussed. Evidence suggests that market confidence has been returning to the High Street

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since the national recession in 2008, with a particular strong economic “upswing” from 2013.

- b) As a result, retailers have had to change business plans for expansion by utilising different technologies to capture and grow their enterprise. The study highlights that while the influence of online/“click and collect” shopping is increasing year on year, there appears to be a national trend of large businesses removing their need for stores within every town centre, as national coverage can be achieved through strong internet coverage. This is prominent in “anchor” stores such as Waitrose and Sainsburys as well as smaller concession stores (e.g. Argos), where the offer of “click and collect” is strong. However, analysis shows that the national trend of internet shopping (i.e. delivery to the door) looks set to plateau over the study period.
- c) The purpose and role of a town centre has been changing to accommodate changing shopping patterns. This poses challenges to town centres who want to be competitive with other retail centres. Therefore, there has been a recent trend to allow a broad range of uses in appropriate locations to market a town centre as a place of social and leisure activity, as well as traditional retail practices. This can include dedicated health/leisure centres and gyms, bars, restaurants, community spaces and facilities.
- d) Both comparison (non-food) and convenience (food) retail is performing well within the District but the study highlights the retail offer to the District is polarised with expenditure being drawn to retail locations outside of the District (i.e. Bluewater to the north, and Royal Tunbridge Wells to the south). Other out-of-District locations such as Orpington, Maidstone, Dartford and Bromley have been included for comparative analysis, but data shows that these retail locations do not have a significant impact on the District, unlike Bluewater and Royal Tunbridge Wells (Appendix B & C).
- e) Overall, the Study suggests that despite the unsettled economic outlook in recent years, retail in the Sevenoaks District has performed rather well. A mix of independent and chain stores, as well as services, within the District’s town and local centres has kept vacant unit rates low and minimised opportunities for “low-end” retail opportunities.

### 14 Comparison Goods (Non-food)

- a) A combined comparison goods spend of approximately £504 million from the Retail Study survey area (not District) is spent in Bluewater (£362.5m) and Royal Tunbridge Wells (£141.1m). Sevenoaks Town Centre has a comparison goods spend of £122.3m, Swanley has £23.1m and Edenbridge £15.7m available from the survey area.
- b) Data from the household and in-centre surveys suggests that Sevenoaks Town (Zone 1) and Edenbridge (Zone 8) has retained a significant amount of comparison goods spend from the District, while Swanley



(Zone 14) has a lower market share of comparison goods. Data collected shows that Bluewater is drawing over 40% of expenditure from the north of the District (Zones 13, 14 and 15) and as much as 20-30% from Sevenoaks Town. There is no comparative draw from the south of District (Zones 8 and 11) to Bluewater as a majority of comparison goods spend is being drawn to Royal Tunbridge Wells (Appendix B).

- c) The Study recommends that the District requires **21,700 sq.m additional comparison goods floorspace** by the end of the new Local Plan period (2035). It must be noted that these are indicative figures and will have to be periodically reviewed during the Local Plan. The allocation of retail floorspace shall be considered in conjunction with other evidence gathered by the Council, which allows some flexibility for distribution.

<i>Comparison Goods (Non-food)</i>	<i>2020</i>	<i>2025</i>	<i>2030 (indicative)</i>	<i>2035 (indicative)</i>
<b>Sevenoaks</b>	3,100	7,200	12,100	17,100
<b>Swanley</b>	400	800	1,400	2,000
<b>Edenbridge</b>	300	600	1,000	1,400
<b>Local Service Centres</b>	200	500	900	1,200
<b>Total</b>	<b>3,900</b>	<b>9,100</b>	<b>15,300</b>	<b>21,700</b>

*Please note that the figures in this table have been rounded and therefore may not add up correctly. Please refer to the Retail Study report and appendices for more information.*

- d) As the forecasts for additional floorspace show, it is anticipated that a majority of the need identified will be located in Sevenoaks. This is due to its status as the District’s primary town centre, as well as the location where a majority of comparison stores are currently located.
- e) The comparison goods floorspace requirements set out in the previous Retail Studies have not been met during the current Local Plan period (up to 2026). This has allowed the growth of convenience floorspace, as well as leisure town centre uses. To ensure that Sevenoaks Town remains a viable and diverse centre, additional comparison floor will have to be considered.

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### 15 Convenience Goods (Food)

- a) The District has a strong convenience goods offering, with at least one foodstore operating in Sevenoaks Town, Swanley, Edenbridge, New Ash Green, Otford and Westerham. Data from the household and in-centre surveys suggests that a majority of residents visit one of these six centres for food shopping, indicating that local retention levels are good within Sevenoaks Town, Swanley and Edenbridge.
- b) Within the Study's survey area (not District) there is approximately £902m of convenience goods spending available, which is expected to increase to £1,036m by 2036. A majority of foodstores operating in the District are over-trading against the company's baseline performance, including Lidl in Sevenoaks which is operating 5 times over the company's average.
- c) The following table sets out the recommended convenience goods floorspace (sq.m.) required over the course of the new Plan period. Like earlier recommendations made on non-food floorspace, these recommendations will be considered alongside other evidence bases to determine the appropriate levels and distribution of development:

<b>Convenience Goods (Food)</b>	<b>2020</b>	<b>2025</b>	<b>2030 (indicative)</b>	<b>2035 (indicative)</b>
<b>Sevenoaks Town</b>	5,200	5,700	6,200	6,500
<b>Swanley</b>	1,100	1,300	1,400	1,600
<b>Edenbridge</b>	800	900	1,000	1,000
<b>Local Service Centres</b>	1,100	1,200	1,200	1,300
<b>Total</b>	<b>8,200</b>	<b>9,100</b>	<b>9,800</b>	<b>10,400</b>

*Please note that the figures in this table have been rounded and therefore may not add up correctly. Please refer to the Retail Study report and appendices for more information.*

### 16 Key Recommendations for the Local Plan

- a) There have been a number of **Districtwide** recommendations to deliver, improve and retain retail provision within the District including:

- Direct all developments of new retail & town centre uses to town centres as prescribed in the NPPF. Main town centre uses could include retail, leisure entertainment and recreational facilities (including cinemas, nightclubs, bars, restaurants, health and fitness centres), arts, culture and tourism developments (NPPF Annex 2);
  - Introduce a local impact assessment threshold of 500 sq. m for retail developments within the District to ensure town and neighbourhood centre viability;
  - Focus new non-food development in Sevenoaks and Swanley town centres; and
  - No out-of-centre allocations and resist open A1 use outside of defined centres.
- b) The Study makes a number of **Sevenoaks Town** recommendations that could be considered as part of the new Local Plan:
- Focus on the provision of non-food floor space, but recognise that there is no requirement for additional convenience goods floorspace;
  - Develop robust frontage policies to ensure active shopping frontages, while developing other town centre uses in secondary areas (i.e. leisure);
  - Enhance the linkages with tourist attractions and the town centre; and
  - Continued investment in the town's public realm and environment.
- c) The Study makes a number of recommendations for **Swanley** including:
- Support proposals that could regenerate the town centre;
  - Develop robust frontage policies to ensure active shopping frontages, while developing other town centre uses in secondary areas (i.e. leisure); and
  - Improve the environmental quality and public realm of the town centre.
- d) Recommendations for **Edenbridge** include:
- The role and function of Edenbridge as a rural service centre should be protected and enhanced over the new Local Plan period;
  - The day to day shopping needs of the town should be maintained through robust primary frontage policies; and
  - A qualitative need for additional supermarket provision should be provided in the town centre, at an appropriate scale and location.

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- e) A number of recommendations have been drawn for the District's **Neighbourhood Centres**, which play a important role for local communities:
- Protect the function and role that the local service centres provide to local communities;
  - The day to day shopping needs of the town are maintained, where possible;
  - Look to enhancing the unique selling points of local centres to ensure viable centres to meet the requirements of local communities.

### Presentation of Findings

- 17 The draft report and findings were circulated to the Planning Portfolio Holder and the Economic and Community Portfolio Holder and their deputies the week commencing 15<sup>th</sup> August.
- 18 A briefing was held on 23<sup>rd</sup> August by GVA Bilfinger at the Council Offices to discuss the outcomes of the Retail Study, the data used and any questions/issues that had arisen for Members and Officers. Both the Planning, and Economic and Community Development Portfolio Holders and deputies were invited. Both Portfolio Holders were in attendance for the briefing. Members were optimistic by the findings of the study but sought further clarification with regards to the calculated need for comparison and convenience good floorspace and the data used. Members also asked that the study examines the impact of leisure use and “coffee culture” has upon town centres.

### Next Steps

- 19 The Retail Study will be used to inform and develop local planning policies which are appropriate and proportionate for the District's town and neighbourhood centres within the emerging Local Plan. This will be considered in accordance with other evidence gathered by the Council as well as ensuring that any policy and guidance is consistent with the NPPF and Planning Practice Guidance.

### Other Options Considered and/or Rejected

Members may wish to consider the option not to endorse an up-to-date Retail Study for the purposes of the new Local Plan. It should be noted that, if a sound evidence base is not produced for the purposes of the new Local Plan, the soundness of the Local Plan could be compromised at public examination.

### Key Implications

#### Financial

The Retail Study is funded through the LDF budget.

Legal Implications and Risk Assessment Statement.

There are no legal implications as a result of this report.

Equality Assessment

The decisions recommended through this paper have a remote or low relevance to the substance of the Equality Act. There is no perceived impact on end users.

**Conclusions**

The Council is currently preparing its new Local Plan, following the revision of the District's housing need for the period, up to 2035. As such, the Council is required to update its evidence base to ensure that it has local planning policy which is consistent with the NPPF. The Retail Study is an evidence base which will be used by the Council to inform and develop its local planning policies for town and neighbourhood centres. GVA Bilfinger was appointed by the Council to undertake a new Retail Study, which updates the previous studies from 2007 and 2009 respectively. The calculated need for both comparison and convenience goods floorspace is calculated on the estimated population and spend per head within the study's survey area. The figures presented in the Study's final report should be treated as indicative up to 2035, as market requirements and viability will have an effect on retail floorspace delivery. In addition, the scale and distribution of retail floorspace will be tested against additional evidence gathered by the Council, before public consultation and submission to the Government's Planning Inspectorate. This report highlights the findings of the Retail Study and the full study is attached at Appendix A to D.

**Appendices**

Appendix A - Sevenoaks District Retail Study (2016): Volume 1 Main Report

Appendix B - Sevenoaks District Retail Study (2016): Volume 2 Plans and Appendices

Appendix C - Sevenoaks District Retail Study (2016): Volume 3 Household Survey Results (NEMS Market Research) **[Not printed on website only]**

Appendix D - Sevenoaks District Retail Study (2016): Volume 4 In Centre Survey Results (NEMS Market Research) **[Not printed on website only]**

**Background Papers:**

[Sevenoaks Local Development Scheme \(LDS\) August 2016](#)

[National Planning Policy Framework \(NPPF\) Paragraphs 23 to 27](#)

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[Local Plans Planning Practice Guidance Para. 8](#)

[NPPF Paragraph 47](#)

[NPPF Paragraph 158](#)

[NPPF Annex 2 Glossary](#)

**Richard Morris**  
**Chief Officer for Planning**

# Sevenoaks District Retail Study

Volume One — Main Report | September 2016



on behalf of



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**For and on behalf of GVA Grimley Ltd**



# 1. INTRODUCTION

1.1 Bilfinger GVA has been instructed by Sevenoaks District Council to undertake the **Sevenoaks District Retail Assessment 2016**. The aim of the study is to provide the Council with an up-to-date evidence base on the existing and future roles and performance of the District's Town, and Service Centres and assess future demand for retail floorspace in the District over the period to 2035. The study has full regard to the expected levels of growth in Sevenoaks and neighbouring authorities, as well as recent and emerging changes in consumer behaviour. Our report provides the Council with a strategy to ensure its network of centres remain vibrant, attractive destinations over the course of the Council's new Local Plan period. It is fully compliant with the requirements of the National Planning Policy Framework (NPPF), and will be able to be used by the Council to inform policies and land use allocations, including the preparation of the aforementioned Local Plan.

1.2 Our study has been informed by on-site and desk-based information-gathering, including site visits to each of the 'Town Centres and Service Centres' in Sevenoaks District. We have also undertaken a desk-based analysis of the Council's network of Service Villages.

Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across Sevenoaks District, and adjacent surrounding areas in which residents may look towards facilities in Sevenoaks District to meet their shopping and leisure needs within the survey area. The extent of the survey area was agreed with the Council at the initial stage of preparation of this study, and the results of the survey can also be used to understand the extent to which surrounding centres and shopping destinations outside the District (such as Bluewater, Royal Tunbridge Wells, Dartford and Orpington) compete with the network of centres within the study area, and define the amount of expenditure 'leakage' taking place to locations outside the District. Additionally in-centre surveys were also instructed as part of this study; these were undertaken in the centres of Sevenoaks, Swanley, Edenbridge, New Ash Green, Westerham and Otford.

1.4 The study acts as a full update to the Council's previous evidence base studies in respect of retail and town centres, namely the Sevenoaks Retail Study (2005) and Sevenoaks District Council Retail Study Update (2009). The last household survey of shopping patterns of residents in Sevenoaks District was undertaken as part of the Sevenoaks Retail Study in 2005.

1.5 Our report refers to different types of retail and commercial leisure floorspace, as follows:

- **'Convenience'** goods refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on;
- **'Comparison'** goods refers to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music
- **'Services'** uses refers to commercial leisure services such as restaurants and cafes, retail services such as hairdressers, beauty salons, banks, building societies and estate agents, as well as non-retail uses such as cinemas and arts centres.

1.6 Our report is split into four volumes. This report forms Volume 1 to the study; Volume 2 sets out supporting plans and appendices; Volume 3 provides the household telephone survey data, prepared by NEMS Market Research; and Volume 4 provides the in-centre survey results. The remainder of this report (Volume 1) is structured as follows:

- **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and town centre planning;
- **Section 3** considers recent national trends in the retail sector, and in particular the implications of recent economic growth and technological advances which are impacting on shopping habits;
- **Section 4** considers the wider study context, identifying the key competing centres surrounding the District, and the extent to which they influence the shopping patterns of residents, as well as providing a summary of their current retail and commercial leisure offer, and proposals for future enhancement of this;
- **Section 5** reviews the composition, role and function of current shopping provision in the Town and Service Centres in Sevenoaks District through 'health check' assessments, as well as reviewing out-of-centre shopping provision;
- **Section 6** sets out our approach to calculating retail capacity, including definition of the household telephone survey area and discussion of approach to the household telephone survey;
- **Section 7** sets out the quantitative 'need' for additional comparison goods retail floorspace in Sevenoaks District over the study period to 2035, with the convenience goods quantitative 'need' assessment provided in **Section 8**;
- **Section 9** draws our analysis together and set out conclusions, strategic guidance and recommendations on future change and growth in Sevenoaks's network of centres.

## 2. PLANNING POLICY CONEXT

2.1 In this section we summarise the key features of national and local planning policy guidance which provide the context and framework for this study.

### NATIONAL POLICY FRAMEWORK

#### National Planning Policy Framework (NPPF), 2012

2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012 sets out the Government's planning policies for England and replaces the suite of National Planning Policy Statements, Planning Policy Guidance and Circulars with a single document.

2.3 The NPPF continues to recognise that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

2.4 The NPPF maintains the general thrust of previous policy set out in PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

- Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

2.5 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia;

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.6 Consistent with transitional arrangements, the Local Plan will be examined by an independent inspector whose role it is to assess whether the plan is sound. In order to be found sound the Plan should be:

- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
- Justified i.e. the most appropriate strategy, when considered against the alternatives;
- Effective i.e. deliverable over its plan period and based on effective joint working; and
- Consistent with national policy i.e. enable the delivery of sustainable development

2.7 Overall, the NPPF adopts a positive approach, with a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless

material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

## National Planning Policy Guidance (NPPG) (2014)

- 2.8 In March 2014 the Department for Communities and Local Government (DCLG) launched the online planning practice guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

## LOCAL POLICY FRAMEWORK FOR SEVENOAKS DISTRICT

### Sevenoaks Core Strategy (March 2011)

- 2.9 The Sevenoaks Core Strategy (February 2011) sets out the vision and policies for future development in the District over the period to 2026. It sets out how sustainable growth will be accommodated largely within existing urban settlements, how the natural environment of the area will be protected and the requirements that proposed new development must meet.

- 2.10 The spatial vision states that Sevenoaks District will deliver up to 3,300 additional dwellings over the plan period 2006-2026. The spatial vision sets out that the majority of new housing will be focused upon the urban areas of Sevenoaks and Swanley. The vision sets out that Sevenoaks urban area will combine new retail, tourism and housing development to support its role as the principal town centre within West Kent. It is stated that Swanley will be regenerated to create a town centre that better meets the needs of the community and supports the economy through the development of new shops, offices, hotel and residential. Finally, it is stated that Edenbridge will retain its role as a service centre serving the surrounding villages. New Ash Green Local Service Centre is identified as being a location for regeneration.

- 2.11 Paragraph 4.1.6 of the Core Strategy identifies the settlement hierarchy within Sevenoaks District. As has previously been noted, Sevenoaks is the principal town, Swanley is identified as the secondary town, Edenbridge is identified as the rural service centre, and New Ash Green, Otford, and Westerham are identified as local service centres. It is these six centres which form the basis of the assessment set out in the study.

**Table 2.1: Settlement Hierarchy in Sevenoaks District**

Centre Hierarchy	Centre
Principal Town Centre	Sevenoaks
Secondary Town Centre	Swanley
Rural Service Centre	Edenbridge
Local Service Centres	Westerham, New Ash Green and Otford
Service Villages	Brasted, Crockenhill, Eynsford, Farningham, Halstead, Hartley, Hextable, Horton Kirby, Kemsing, Knockholt Pound, Leigh, Seal, Sevenoaks Weald, Shoreham, South Darenth, Sundringe and West Kingsdown.

Source: Sevenoaks Core Strategy (adopted February 2011)

- 2.12 In terms of the potential for growth, Table 2.1 of the Core Strategy identifies that Sevenoaks urban area will support 1,331 housing units, Swanley 660 housing units and Edenbridge 411 units. Policy LO1 of the Core Strategy states that development will be focused within the Sevenoaks urban area. Additionally this policy states that Swanley will be the secondary focus for development to aide regeneration, and development within Edenbridge will be appropriate to the scale of the centre.
- 2.13 Policy LO2 states that the emphasis of development within the Sevenoaks urban area should be located within the town centre, within easy walking distance of the town centre and/or stations.
- 2.14 In relation to Sevenoaks town centre, paragraph 4.2.19 identifies potential sites for new development:
- West of Bligh's Meadow on the north western side of the town centre (mixed use development to include retail and café/restaurant use (this development has been implemented).
  - East of the High Street adjoining Buckhurst Way (this area is owned by the Council and offers scope for retail development with related town centre uses closely linked to the High Street)
- 2.15 Policy LO3 further elaborates on development potential in Sevenoaks town centre and states that the town centre can accommodate approximately 4,000 sq.m of new shopping floorspace (1,700 sq.m of convenience and 2,300 sq.m of comparison) will be provided within

the town centre up to 2026. It should be noted that these findings were informed by the Council's previous retail evidence base study (Sevenoaks District Council Retail Study Update, GVA, June 2009), which this study updates.

2.16 Section 4.3 sets out the development strategy in Swanley. Policy LO4 suggests that Swanley could accommodate up to 660 dwellings, and states that the emphasis for development will be on the town centre and adjoining areas. The supporting text of this policy states that the Council has been working with landowners to promote a regeneration scheme for the town centre. It is stated that *'the enhancement of the centre can act as a catalyst for enhancing the town'*. Paragraph 4.3.21 states that the town centre would benefit from a hotel development which would assist with regeneration in the town centre and widen the range of activity provided within the centre. A planning application for the redevelopment of Swanley Square, which forms the main retail area in Swanley town centre, has recently been submitted to the Council.

2.17 Policy LO5 relates specifically to Swanley town centre and states that the town centre will be regenerated so that it better meets the needs of the population it serves. The regeneration scheme will contain a mix of uses including retail, and the provision of a hotel will be supported.

Policy LO6 relates to development in Edenbridge. This states that in Edenbridge, provision will be made for 410 dwellings between 2006 and 2026 on a range of sites within the urban area. It goes on to state that the *'mix of retail and service uses that contribute to the vitality and viability of the town centre will be maintained'*.

### Allocations and Development Management Plan (adopted February 2015)

2.19 The Sevenoaks Allocations and Development Management Plan (ADMP) provides the policy to implement and build upon the policies contained within the Core Strategy. Section 5 of the Sevenoaks Allocations and Development Management Plan focuses on Town and Service Centres. This section reiterates the settlement hierarchy set out in Policy LO1 of the Core Strategy.

2.20 The text box on page 48 relates to town and local centre definitions. This states that a town centre is a 'defined area, including the primary shopping area and areas predominately occupied by main town centre uses within or adjacent to the primary shopping area'. Primary Shopping Frontage is defined as being 'likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary Shopping Frontage is defined as being likely to include a diversity of uses such as retail, restaurants, cinemas and businesses.

2.21 Paragraph 5.7 states that applicants will be expected to show that proposals for change of use away from retail uses will need to meet the tests set out within the National Planning Policy Framework.

2.22 Policy TLC1- Sevenoaks Town Centre states that within the town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b), c) and d) (listed below the bullet points):

- *'outside the Primary Retail Frontages and the area defined in Policy EMP1(g) for B1 Business Use, and*
- *on the upper floors of units within Sevenoaks Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.*

*b) within the Sevenoaks Primary Retail Frontage, at least 70% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the predominant retail function and not lead to a dead town centre frontage during regular shopping hours.*

*c) within the Sevenoaks Secondary Retail Frontage, proposals for the use of ground floor premises for retail and other A Class uses will be permitted where they would not lead to a dead town centre frontage. Ground floor A Class uses will be maintained except where evidence is provided by the applicant to show that these uses are no longer financially viable. In such circumstances, non-residential town centre uses at ground floor level would be permitted.*

*d) within the areas defined in Policy EMP1, Business Uses will be retained or permitted'.*

2.23 Policy TLC2 relates to Swanley town centre. This policy states the following:

*'a) within Swanley Town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b), and c):*

- *outside the Primary Retail Frontages, and*
- *on the upper floors of units within Swanley Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.*

*b) within the Swanley Primary Retail Frontage, at least 70% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the*

predominant retail function and not lead to a dead town centre frontage during regular shopping hours. Proposals resulting in the change of use of existing nonA1 uses within the Primary Frontage to retail and other A class uses will be permitted where this would be complementary to the predominant retail function.

c) within the Swanley Secondary Retail Frontage, proposals for the use of ground floor premises for retail and other A Class uses will be permitted where they would not lead to a dead town centre frontage. Ground floor A Class uses will be maintained except where evidence is provided by the applicant to show that these uses are no longer financially viable units in these uses. In such circumstances, non-residential town centre uses at ground floor level would be permitted'.

2.24 Policy TLC3 relates to Edenbridge town centre and states that:

'a) within Edenbridge town centre, residential, business, leisure, entertainment, arts, culture, tourism or community facility uses will be permitted where consistent with criteria b) and c)

- outside the Primary Retail Frontage, and
- on the upper floors of units within Edenbridge Primary Retail Frontages where there will be no adverse impact on the functioning of the ground floor use.

b) within the Edenbridge Primary Retail Frontage, at least 45% of the ground floor frontage will be maintained in A1 use. Where proposals would not lead to the percentage of A1 frontage falling below this level, A Class uses will be permitted where they would complement the predominant retail function and not lead to a dead town centre frontage during regular shopping hours. Proposals resulting in the change of use of existing nonA1 uses within the Primary Frontage to retail and other A class uses will be permitted where this would be complementary to the predominant retail function.

c) in the Northern and Southern Areas of Edenbridge town centre, the balance between shops, services and community facilities and residential uses should be maintained, except where evidence is provided by the applicant to show that these non-residential uses are no longer financially viable. In such circumstances, residential redevelopment will be acceptable. Proposals that would result in changes between town centre uses in these areas will be permitted'.

2.25 Policy TCL4 sets the policy for Neighbourhood and Village Centres. This policy states that:

'Within neighbourhood and village centres, as defined in Appendix 8, a range of shops (including Use Class A1) and services (including Use Classes A2, A3, A4 and A5) will be maintained.

Changes of use between shopping and service uses within neighbourhood and village centres will be permitted where this would not lead to the loss of A1 units serving the day to day needs of the community or required to ensure that the centre is capable of meeting the day to day needs of the community during the plan period. Proposals resulting in a net loss of shopping or service uses will not be permitted unless evidence is provided to the Council to show that the operation of the facility is no longer financially viable and where there are no other realistic proposals for retail or service uses on the site, including through Community Right to Buy.

Appropriately located additional retail or service units in neighbourhood and village centres will be permitted where the proposal is of a scale appropriate to the centre and would not materially undermine the existing balance of uses.

Residential, business or community uses of the upper floors of units within neighbourhood and village centres will be encouraged where there will be no adverse impact on the functioning of the ground floor retail or community use'.

## Sevenoaks District new Local Plan (2015-2035)

2.26 Sevenoaks District Council is in the process of preparing a new Local Plan for the District which will cover the period 2015-2035. It is anticipated that consultation on the Issues and Options Local Plan will take place in spring/summer 2017.

### Evidence Base for the new Local Plan

2.27 In addition to the preparation of this Retail Study, a number of other documents are currently being prepared to form part of the new evidence base for the new local plan, including new Strategic Housing Market Assessment (SHMA) and Economic Needs Study (ENS).

2.28 The SHMA states that Sevenoaks District is within the West Kent Housing Market Area and identifies cross boundary interactions between Swanley and Dartford and Swanley and London. The SHMA states that Sevenoaks District has an average annual need of 620 units per annum between the years 2013-2033. At the time of preparation of this study, the Council have not made a final decision on strategic locations where this growth will be accommodated.

2.29 The ENS is a joint study for Sevenoaks District and Tunbridge Wells Borough Council. The study identifies that Swanley town centre, New Ash Green village centre, Edenbridge and Sevenoaks



town are locations for potential growth within Sevenoaks District. The ENS is currently being finalised and we have had regard to its key conclusions in the preparation of this study.

2.30 As part of the development of the new Local Plan, a vision for Swanley and Hextable is being developed. It is understood that a draft version will be published in Autumn 2016 and that an update briefing was taken to committee in the early part of August 2016. The vision includes improvements to retail, residential development and infrastructure improvements. The Vision looks at different scenarios for growth over the plan period. A key recommendation of the vision is that regardless as to the growth scenario that is applied to the town centre, improvements to the train station are key to providing the supporting infrastructure to support the regeneration of Swanley. It is also recognised that U+1, main landowner, has submitted its own planning application for the town centre, running alongside the Vision process.

2.31 A number of other evidence base documents have been prepared or are in the process of being prepared including:

- Sevenoaks District Tourist Accommodation Study (September 2015)
- Strategic Housing Land / Economic Land Availability Assessment (SHLAA/ELAA in preparation 2016)
- Open Space, Sports & Leisure Study (in preparation 2016)
- Strategic Flood Risk Assessment (in preparation 2016)
- Swanley and Hextable Vision (in preparation 2016)
- Green Belt Assessment (in preparation 2016/17)
- Landscape Character and Capacity Study (in preparation 2016/17)
- Affordable Housing / Commercial Viability update (in preparation 2016/17)
- Infrastructure Plan / Transport Update (in preparation 2016/17)
- Settlement Hierarchy update (in preparation 2016/17)
- A Sustainability Appraisal / Strategic Environmental Assessment (SA/SEA) is being prepared concurrently with the Local Plan.

## Changes in legislation

2.32 The Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. Of particular relevance, the amendments allow permitted change from retail

premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities which restrict the amount of non-A1 units in a retail centre or frontage, such as those set out above in the ADMP.

## Summary

- **The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national Planning Policy Statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period.**
- **The Council's development plan is chiefly formed of the Sevenoaks Core Strategy (March 2011) and the Allocations and Development Management Plan (February 2015). Together, these documents confirm that town and service centres will continue to be the focus for new development. New development will be delivered in accordance with a clear spatial strategy, which provides the most sustainable way to accommodate growth supported by high quality infrastructure, whilst respecting the unique character of the District and the local distinctiveness of individual settlements. Main settlement areas including Sevenoaks and Swanley have been identified as the most sustainable locations for new development within Sevenoaks District.**
- **A vision for Swanley is currently being developed, and it is understood that this will be published in Autumn 2015.**

## 3. STUDY AREA AND CONTEXT

- 3.1 In this section we set out a summary of current national trends in respect of the retail and commercial leisure sectors, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in Sevenoaks District.

### A return to growth

- 3.2 Analysis published by Experian (Retail Planner 2015) identified that following several years of subdued performance, including a period of recession; a 'strong economic upswing' took place in early 2013, driven by increases in consumer spending and business investment. Experian expect the UK economic upswing to continue, although at a slower pace than seen in recent years. In the short-to-medium term, Experian expect progress to be 'restrained' due to government finances remaining under pressure, and weaker exports to the Eurozone.
- 3.3 Experian also point to the fact whilst retail sales have prospered between 2013 and 2016 due to the 'exceptional buoyancy' of consumer spending (because of low inflation and stronger earnings growth), this buoyancy is only true in terms of volumes of sales. Experian state that the value of goods has 'been depressed by heavy discounting and persistent deflation of goods prices'. This has been particularly noticeable in the convenience (food) goods sector.
- 3.4 There has therefore been a return in confidence to consumer spending since 2013, which offers potential for strongly-performing town centres to capitalise on, although this is tempered by other changes in the retail sector which we discuss below.
- 3.5 The implications of the UK's decision to leave the European Union on 22<sup>nd</sup> June 2016 may also provide a further restraint on future levels of expenditure growth, given the uncertainty over the nature and format of the country's future relationship with Europe will be. However, data providers such as Experian have confirmed that it is too early to speculate on the extent to which this decision may influence economic growth in either the short to medium term, but this will need to be monitored carefully over the course of the Council's new Local Plan period by way of regular updating of the Council's retail capacity forecasts.

### Changing Retailer Space Requirements

- 3.6 During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing

their development programmes on the provision of large flagship stores in strategic locations (such as Bluewater for example), supported by smaller satellite stores and transactional websites. Many operators are continuing to close stores in less-profitable, smaller locations as leases expire.

- 3.7 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, often supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats, and can pose a particular challenge to smaller and medium-sized centres, where there are higher order centres in close proximity.
- 3.8 An often inevitable consequence of the above trend is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Primark and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates. Sevenoaks town centre appears to have been relatively resilient post-recession, whilst the centre has representation from more value orientated retailers such as Poundland, it has retained and indeed attracted some more 'mainstream' operators such as Marks & Spencer. Indeed through the Bligh's Meadow development, Sevenoaks town centre has attracted brands that specifically target market towns – these brands include Mint Velvet, Fat Face and Crew Clothing.
- 3.9 Consequently, Sevenoaks has successfully developed an upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. Examples of other centres that have successfully developed a more upmarket offer include Royal Tunbridge Wells, Horsham and Guildford which have continued to perform strongly throughout the economic downturn, by offering a curated, specialist retail offer often centred on upmarket clothing, homewares, and casual dining offer. Typically these centres also offer a strong historical setting and environmental quality which increases their attractiveness as 'destinations' (a point we discuss further below).

### Internet Growth & Multichannel Retailing

- 3.10 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised

concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.

- 3.11 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5bn (Verdict 2014). Verdict comment that 'the importance of click & collect should not be underestimated. Maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement'. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.

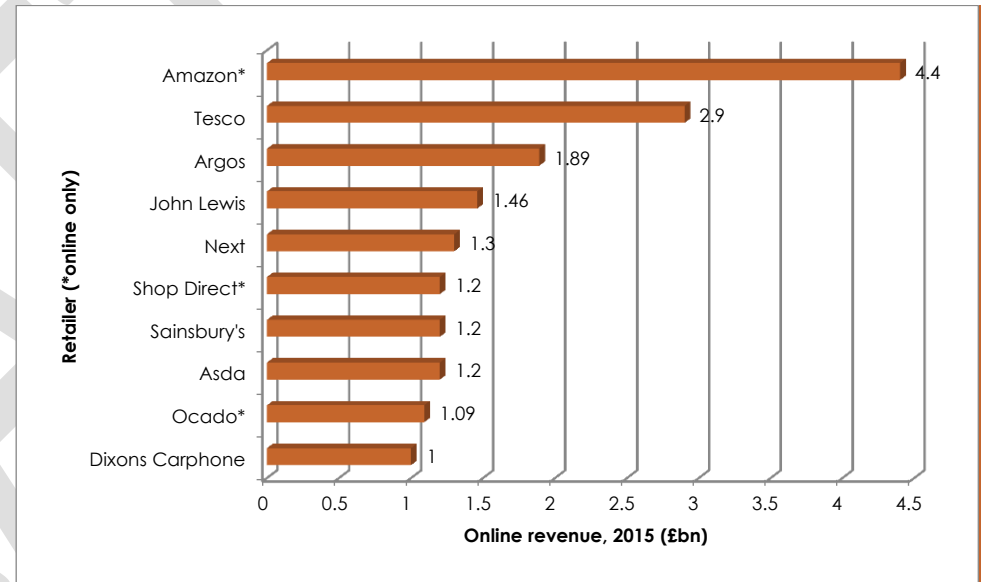


Westerham Green

- 3.12 Many national retailers now operate 'Click & Collect' facilities, with examples in Sevenoaks District including Marks & Spencer, Tesco, and Boots. It is noteworthy that of the top ten online retailers in 2015, seven have a physical presence on the UK High Street, and all of these offer 'Click & Collect' facilities (Figure 3.1). Of these seven, two are currently trading in Sevenoaks town centre (Tesco and Waitrose (for John Lewis) and Sainsbury's, Argos and Asda also have a trading presence elsewhere in Sevenoaks District. Despite being a relatively new concept for the retail sector to embrace, click & collect is therefore affirming that physical stores can

continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition. The Click & Collect phenomenon can be expected to drive an occupier desire to maintain a representation of physical store units across town centres.

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. \*denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores

### The role of the town centre

- 3.13 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the final



quarter of 2015<sup>1</sup>, emphasising the need for centres to offer as broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.

- 3.14 Our health check assessment of Sevenoaks town centre (Section 5) confirms that there is a good level of provision of bars, restaurants and food outlets within the town centre, which means that footfall, particularly outside of retail trading hours, is relatively strong. There is clearly potential to further integrate the retail and leisure offer within the town centre. We discuss this further in the following sections of this report.
- 3.15 Centres which offer a unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly; such examples in Sevenoaks District include Edenbridge, Otford and Westerham. Enhancing the non-retail offer so town and district centres function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness — in Sevenoaks town centre there is potential to further enhance its links with heritage assets such as Knole, and in Westerham Chartwell and its links with Winston Churchill, is a unique selling point few other locations can capitalise on. Sevenoaks and Westerham represent an important example of how place marketing can be used to raise the image and profile of a location.

To ensure that town and district centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives. Many of the centres in Sevenoaks District are already performing well in this respect and this should remain an important element of the Council's strategy for the development and enhancement of its centres.

- 3.17 A number of town centres have sought to establish partnerships which seek to develop, support and promote their town centres. Quite often, these take the form of Business Improvement Districts (BIDs). Examples of successful BIDs which have been established in centres comparable to those in Sevenoaks District include Ulverston, Kendal, Camberley and Oxted.
- 3.18 Typically, BIDs levy an additional charge on top of business rates which fund events and schemes within town centres to enhance their attractiveness as shopping destinations. The

levies typically range between 1-1.5%, of the rateable value of businesses in the area. There are currently no BIDs in Sevenoaks District and there may be potential for the establishment of these providing sufficient local buy in can be secured, however many town centres are small with limited capacity to create enough momentum and support to ensure a successful BID.

## The convenience sector

- 3.19 The convenience goods market has witnessed a fundamental change in shopping patterns in recent years, as people increasingly prefer to shop more frequently in smaller-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016. Sainsbury's gained planning consent in March 2014 for a new store on Fircroft Way, Edenbridge. However, in May 2015, Sainsbury's announced that it would not be bringing the site forward, citing that the scheme was no longer viable.



Asda store in Swanley town centre

<sup>1</sup> Source: British Retail Consortium, January 2016

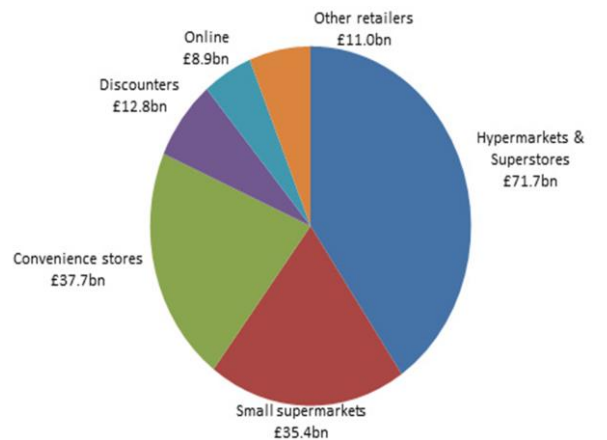
3.20 The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and are pursuing ambitious development programme of opening new stores as well as refurbishing older stores. There has also been growth at the 'premium' end of the convenience goods market, with both Waitrose and M&S Food growing store numbers (with both retailers being represented within Sevenoaks town centre), with Waitrose having invested in redeveloping their store in recent years.

3.21 The chart below (**Figure 3.2**) shows the composition of the convenience goods sector in 2015, based on data collected by The Institute of Grocery Distribution (IGD). IGD estimate that the UK grocery market was worth £177.5bn in 2015, and of this 'convenience stores' (defined by IGD as stores under 3,000 sq.ft net) claiming £37.7bn of this (21.2%). However, as Figure 3.2 shows, notwithstanding the unquestionable growth in the popularity of 'convenience' stores, most of the food shopping spend is still accounted for by larger-format stores — £71.7bn was spent in 'hypermarkets and superstores' (stores over 25,000 sq.ft net) in 2015, and a further £35.4bn in 'small supermarkets' (stores between 3,000 and 25,000 sq.ft net).

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3.22 There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, and indeed these remain the principle format of convenience goods shopping for the District, but more widely speaking operators are opening more, smaller format stores than was the case at the time of the Council's previous evidence base studies. Operators with 'hyper-market' format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, some branches of Sainsbury's are trialling Argos concessions, and branches of Tesco Extra include either concessions from retailers such as Holland and Barrett, Dorothy Perkins and Burton.

**Figure 3.2: UK grocery market spending, 2015**



Source: IGD UK Grocery Market and channel forecasts 2015-20.

3.23 These examples confirm that there remains appetite from foodstore operators to open new stores where suitable opportunities arise, although the size of foodstores being committed to is generally less than has previously been the case. We expect the 'big four' retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

## Out-of-Centre Retailing

3.24 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

3.25 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M. In Sevenoaks District there is a small concentration of out-of-centre retail warehousing at the Otford Road Retail Park and Aisher Way. Whilst many of the stores are 'bulky goods' in nature, there are examples outside of the district in locations such as Orpington and Royal Tunbridge Wells of units being occupied by 'high street' retailers, and these can be expected to compete with centres in Sevenoaks town centre for comparison goods spending.

3.26 Additionally, the impact upon Sevenoaks town and the wider district of Bluewater Shopping Centre should not be underestimated. The role and nature of Bluewater reflects a wider trend which has, in recent years, seen the evolution of the traditional mall, expanding the product offer, and developing beyond just retail to introduce food and beverage, and other leisure uses such as cinemas, encouraging longer dwell times. The offer of large shopping malls such as Bluewater has now developed into creating a 'destination' that provides retail, leisure uses (such as cinema, and urban golf) and food and beverage. We discuss the influence of Bluewater on shopping patterns within the district in Section 4.

## Commercial Leisure

- 3.27 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres.
- 3.28 Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns, such as Swanley which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.
- 3.29 The recession brought mixed fortunes for the restaurant sector. The main casualties were from the more exclusive end of the market, as well as smaller companies with less established brands. Many companies owning multiple brands expanded throughout the economic downturn and continue to trade well, often by offering heavy promotions and discounts. In recent years, expansion in the restaurant sector has been driven by 'casual dining' operators such as Byron, Giraffe, GBK, Wagamama, Carluccios, Pizza Express and so on – although as mentioned above, whilst Sevenoaks town centre has attracted a number of these operators, there are still gaps within this sector. It is also clear that in terms of food and beverage, the smaller centres within Sevenoaks District have successfully retained a number of independent operators.
- 3.30 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers, albeit more slowly outside of London. A number of independent shops operate in Sevenoaks town centre.
- 3.31 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that *'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub'* (our emphasis). The report goes on to identify *'the need to improve the leisure and food and beverage offer, and to develop the evening economy through restaurants and in-town cinemas'*

- 3.32 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline has continued at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon (operator of The Sennockian in Sevenoaks) have achieved sales growth in recent years and continue to expand. In London, the popularity of specialist pubs offering craft beers and local ales also remains strong, and this is a trend which is now becoming popular in other urban areas. This is an area of potential growth that could be developed within some of the centres in the District.
- 3.33 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym (none of which currently have a facility within Sevenoaks District). This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.
- 3.34 The cinema market is also continuing to perform strongly, and in recent years has overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK.
- 3.35 Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate complementary 'family dining' restaurants such as Nando's, Pizza Express and so on, as well as coffee shops, enabling them to act as leisure 'destinations' in their own right. For example, Cineworld has opened eight new sites since 2015, including in market towns such as Loughborough and Hinckley; Odeon has opened fewer new sites (six since 2012) but also continues to open in smaller centres, such as Llanelli and Trowbridge. Everyman and Curzon cinemas offer a more 'boutique' cinema experience and are located in towns of a similar size to Sevenoaks — Everyman have recently opened in Harrogate.

## Summary

- **The 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. Whilst confidence is**

now returning to consumer spending — particularly in terms of comparison goods spending — the growth in online shopping, including multi-channel retailing, acts as tough competition for the high street. It also however presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'click & collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences.

- Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Many retail parks are seeking to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.
- Town centre strategies which support the continued evolution of the high street are therefore considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets including cinemas, arts venues, cafés, bars and restaurants to increase length of stay and spend.
- It will be important, therefore, for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place. Many of the centres in Sevenoaks District are already placed well in this respect of having a diverse offer and role of the town centre, but continued enhancement and promotion of these uses will be necessary over the course of the Council's Local Plan period.

## 4. THE SUB-REGIONAL CONTEXT

- 4.1 In this section, we first set out the sub-regional context within which the Town and District Centres in Sevenoaks operate in. This is an important consideration as patterns of retail and leisure visits are not 'closed' systems, and increasingly residents are willing to travel longer distances, particularly for comparison goods shopping and leisure. Therefore, it is natural to expect a degree of expenditure 'leakage', and this is particularly applicable in the case of Sevenoaks given that (i) the centres in the District are in some cases relatively small and (ii) the District is surrounded by a number of 'heavyweight' retail destinations such as Bluewater, which both have a retail offer of a scale which enables them to draw trade from wide catchment areas, particularly in the case of Bluewater.
- 4.2 In order to establish where residents in the District are currently undertaking their shopping and leisure visits, a household telephone survey of shopping patterns was undertaken in support of this study. Further details of this, including the definition of the 'survey area' which has formed the basis of our assessment, is provided in Section 6. To summarise, the household survey identified that the destinations shown in Table 4.1 represent the key competitors for centres in Sevenoaks District, in respect of comparison goods spending:

- **Bluewater** (claims £362.5m of comparison goods spending available to survey area);
- **Royal Tunbridge Wells** (claims £141.1m of comparison goods spending available to survey area)
- **Orpington** (claims £129.5m of comparison goods spending available to survey area);
- **Dartford** (claims £85.4m of comparison goods spending available to survey area);
- **Bromley** (claims £69.9m of comparison goods spending available to survey area); and
- **Maidstone** (claims £60.6m of comparison goods spending available to survey area);

### Bluewater

- **Venuescore Retail Ranking: 26**
- **Trade draw from survey area: £362.5m**

- 4.3 Bluewater Shopping Centre is approximately 18 miles from Sevenoaks. Bluewater is a major 155,700 sq.m out of town shopping and leisure complex situated in the borough of Dartford, northwest Kent, owned 30% by its developer Land Securities, 10% by Hermes, 25% by Lend

Lease Group and 35% by Prudential Plc. It is built over three floors and anchored by large John Lewis, Marks and Spencer and House of Fraser alongside 327 other retail, eating or drinking outlets, of which 40 are restaurants. The centre also comprises a 13 screen cinema, events venue Glow and an adventure golf course.

- 4.4 Since its opening the centre has undergone numerous refurbishments, upgrades and extensions to maintain its position as a shopping centre of regional importance and further improve its offer to visitors. Venuescore ranks Bluewater at 26th position in its 2014-15 Index, and identifies the 'market position' as being 'Middle'.

### Planned Development

- 4.5 A planning application has recently been submitted to Dartford Borough Council (August 2016) for the redevelopment of Bluewater's West Village, which if permitted will increase the size of the complex by approximately 30,000 sq.m of additional retail floorspace and could create 2,300 jobs.

### Royal Tunbridge Wells

- **Venuescore Retail Ranking: 52**
- **Trade draw from survey area: £141.1m**

- 4.6 Royal Tunbridge Wells is approximately 11.6 miles from the town centre. Royal Tunbridge Wells town centre provides a mix of retail, leisure, cultural and civic facilities. It is an affluent town with very low unemployment. Venuescore<sup>2</sup> ranks Royal Tunbridge Wells in 52nd position in its 2014-15 Index. Venuescore identify the 'market position' of Royal Tunbridge Wells as being 'Upper Middle' (see footnote 2). The Experian Goad category report for Royal Tunbridge Wells identifies a total of 65,635 sq.m of ground floorspace for retail and service units, comprising 494 outlets.

<sup>2</sup> Venuescore is an annual survey compiled by Javelin Group, which ranks the UK's top 3,500+ retail venues (town centres, stand-alone malls, retail warehouse parks and factory outlet centres), based on a number of factors including scale of offer, presence of key attractors/ 'anchor' stores and market positioning (a 'lower' market position indicates a value/discount-orientated retail offer, whilst an 'upper' market positioning indicates an upmarket/quality/exclusive retail offer). In reality, most centres fall within the 'upper middle', 'middle' or 'lower middle' market positions, depending on how diverse the quality of their retail mix is.



4.7 The centre has a number of different character areas each with a different retail/leisure mix, and this variety in its offer is an important factor in its generally strong vitality and viability. National retailer representation is focused in and around recent Royal Victoria Place, including representation from Marks & Spencer and Fenwick, plus clothing operators such as Topshop/Topman, Next, Gap, and River Island. The closure of the BHS store in the town centre as a result of the company entering administration will release a prime retail site onto the market. Higher-end retail and restaurants located on Mount Pleasant Road (which links the town centre with the town's railway station), and beyond this on High Street, and representation in this area includes more specialist operators such as Joules, Cath Kidston and Jigsaw. Beyond this, the historic Pantiles and the Corn Exchange areas offer a range of quality upmarket boutiques and cafes, where the offer is more focused towards independent retailers.

4.8 Royal Tunbridge Wells Together is a recently formed town centre management organisation for Royal Tunbridge Wells. Its aim is to provide effective leadership, co-ordination and resources to make Royal Tunbridge Wells a high quality destination for business, retail, culture and leisure and to maintain its competitive edge within the south east region by increasing vitality and viability across the town centre. Royal Tunbridge Wells Together is a partnership organisation between Royal Tunbridge Wells Borough Council and a wide variety of businesses operating in the town centre. It is now being considered whether the organisation should become a full Business Improvement District.

#### Out of Centre Retail in Royal Tunbridge Wells

Royal Tunbridge Wells has a substantial amount of out-of-town retail floorspace in the North Farm / Longfield Road area, approximately 4km to the north-east of the town centre. The offer here is a mixture of 'bulky goods' and 'high street', but has in recent years increasingly moved towards the latter, with representation from John Lewis at Home, Marks & Spencer Food & Home, TK Maxx and so on. An Asda supermarket also opened on Longfield Road in 2012.

#### Planned Development

4.10 Royal Tunbridge Wells town centre has a number of opportunity sites for development which are expected to come forward for a mixture of town centre uses in the short to medium term:

- Royal Tunbridge Wells Borough Council, Kent County Council and Royal Tunbridge Wells Museum & Art Gallery are currently planning a combined Learning & Culture Hub for the town which will move together the Museum, Art Gallery, Library, Adult Education Services, Visitor Information Centre and Gateway (Royal Tunbridge Wells Borough Council's public service centre) into one combined complex. The project is being funded by the Heritage Lottery Fund and will involve the restoration, refurbishment and

joining of two existing buildings. An architect for the project has recently been procured.

- Royal Tunbridge Wells Borough Council are seeking the redevelopment of the former cinema site on the corner of Mount Pleasant Road and Church Road, to come forward with development proposals for the brownfield site, following which discussions are now taking place with the its Planning Team. Planning permission, which has now expired, was granted to construct a hotel, restaurants and retail units on the site before the 2008 financial crisis, however this proposal fell through and the site was sold to its current owners. Following the subsequent granting of Conservation Area Consent the derelict cinema has been demolished leaving the site vacant without further development proposals until recent talks began. The site has been allocated for ground floor retail use alongside residential, hotel and conferencing uses, in the Submission Draft Site Allocations DPD.
- An extension to the existing Royal Victoria Place was approved in March 2016. The will involve the provision of 140,000 sq.ft of new retail, food and beverage and a 30,000 sq.ft cinema. The corner of Calverley Road and Camden Road will be redeveloped with new buildings and a new entrance. The former Friendly Society building on Camden Road will be totally refurbished, retaining its original features.

#### Orpington

- Venuescore Retail Ranking: 290
- Trade draw from survey area: £129.5m

4.11 The Experian Goad category report for Orpington (April 2015) identifies a total of 34,188 square metres of ground floorspace for retail and service units, comprising 270 with 36 units vacant. Venuescore ranks Orpington in 290th position in its 2014-15 Index. Venuescore identify the 'market position' of Orpington as being 'lower middle', suggesting that it has a lower quality retail offer. Retail provision in Orpington is centred upon the Walnuts Shopping Centre off of the High Street, which provides convenience and some lower end comparison multiples like Wilkinson, Argos, M&Co, Peacocks, Poundland, 99p Stores and WH Smith, in addition to independents and eateries like Bella Italia, Creams and Dean's Dinner. The centre also includes an Odeon cinema and adjoins a new library, market space, Sainsbury's foodstore, Orpington College and Walnuts Leisure Centre. A new Premier Inn is also opening soon. Orpington High Street also includes a variety of independent and some other key multiples; however form an offer aimed mainly at local needs.

### Out of Centre Retail in Orpington

- 4.12 Nugent Retail Park in Orpington is a retail park with some major comparison 'high street' retail names often not found outside town centres rather than supermarkets and bulky goods outlets. It is anchored by Debenhams and features Clarks, Cotswold Outdoors, Game, Early Learning Centre, Waterstones, Marks & Spencer, Next, Laura Ashley, Maplin, Hobbycraft, Mothercare, Pets at Home and others, alongside Nandos, Costa Coffee and Pizza 1889. Across the road there are also two other retail warehousing units – Magnet, Carpet Right and TK Maxx. The 2,200 sq.m Orpington Retail Park, also accommodates a branch of Sports Direct and Dreams such as nearby Springvale Retail Park includes more conventional 'bulky goods' retailers featuring Currys PC World, Furniture Village, Wren Kitchens & Bathrooms, Harveys, Bensons for Beds and Paul Simon.

### Dartford

- Venuescore Retail Ranking: 261
- Trade draw from survey area: £85.4m

- 4.13 The Experian Goad category report for Dartford (April 2015) identifies a total of 38,266 square metres of ground floorspace for retail and service units, comprising 344 units of which 65 were vacant. Venuescore ranks Dartford in 261st position in its 2014-15 Index. Venuescore identify the 'market position' of Dartford as being 'lower Middle'. Dartford performs in line with the national average for comparison retail, however underperforms, suggesting its retail offer is towards the down market end relatively compared to other centres of similar size and catchment with strong competition from nearby from Bluewater and Lakeside and underperforms in convenience retail provision compared to the national average. Dartford does however benefit from excellent connectivity close to the M25 (approximately 5 miles from Swanley) and with fast rail links into London and Kent.
- 4.14 The opening of Bluewater in 1999 had a major positive impact on job creation and retail provision in the district more broadly, however compounded decline in Dartford town centre's retail offer, with cheaper stores such as Primark, Wilkinson and Aldi not on offer at Bluewater replacing higher order retailers. The withdrawal of Tesco from developing a new major store in Dartford in January 2015 due to its own financial difficulties have held back retail led regeneration in the town, with a large parcel of land purchased and assembled for the development still left derelict in Lowford Road. Tesco has since sold all its surplus land holdings where new stores will now not be developed to developer Meyer Bergman, who are now beginning discussions with Dartford planning officers.

- 4.15 However, Dartford does retain two shopping centres, which are now moving positively forward (see below). The Priory has evolved to offer a mixture of lower end comparison and convenience multiples like Poundland and Wilkinson, eateries and takeaways, independent retailers and retail service providers, alongside a Sainsbury's supermarket. The Orchards Shopping Centre is anchored by Primark and Aldi, and also provides a mixture of convenience and some comparison multiples including New Look, Peacocks and Carphone Warehouse in addition to a number of independent businesses. Further retail and services extends along the historic high street and surrounding streets, where markets take place on Thursday and Saturday. Leisure provision in Dartford includes the successful Orchards Theatre, community arts facility The Mick Jagger Centre and Dartford Borough Museum.

### Out of Centre Retail in Dartford

- 4.16 Prospect Place is a major retail park on the edge of Dartford town centre which includes Asda Living, B&Q, Bathstore, Bensons for Beds, Carpet Right, M&S Simply Food, Matalan, Next Home, ScS and TK Maxx alongside Pizza Hut and Costa Coffee and can be expected to be a key competitor to the town centre. The smaller Dartford Heath Retail Park, Heath Lane provides a Dunelm, Jollyes and Halfords. Tower Hill Retail Park (located on the outskirts of Dartford, within the London Borough of Bexley) is a large retail park featuring a Hobbycraft, Currys PC World, Sports Direct, and Greggs.

### Planned Development

- 4.17 Dartford Borough Council has worked with local businesses to establish a Town Team which has produced a High Street Revival Plan for Dartford with the objective of not competing with Bluewater's regional comparison offer but to develop Dartford's USP as a historic market town with a locally focused offer, supporting the survival and growth of small retail businesses, markets and events in partnership with the community. They recognise the need to tackle littering, anti-social behaviour and the cost of car parking, and support the opportunity for residential development in the outlying town centre streets to improve vitality. The third phase of the refurbishment of the Orchards Shopping Centre has just been completed, with the vacant Waitrose store being converted into three smaller units to be occupied by a gym, Aldi and Poundworld. The Priory Shopping Centre has also just been purchased for £30 million by Ellandi, who plan to bring forward further investment.

## Bromley

- Venuescore Retail Ranking: 39
- Trade draw from survey area: £69.9m

4.18 Bromley town centre, recognised as a metropolitan centre in the London Plan, is located in the south east London Borough of Bromley. Venuescore ranks Bromley 39<sup>th</sup> position in its 2014-15 Index, and identifies the 'market position' of Bromley as being 'Middle'. The Experian Goad category report for Bromley identifies a total of 99,900 sq.m of ground floorspace for retail and service units, comprising 493 outlets. Bromley acts foremost as a comparison goods centre with The Glades shopping centre (now known as intuBromley) built in 1991, forming the centre of the retail offer, anchored by H&M, Debenhams and Marks & Spencer alongside a wide range of multiple stores including high end brands like Apple, Kurt Geiger and Massimo Dutti and a variety of high street brands. The centre has lost two of its anchor department store retailers in recent years including House of Fraser, reducing its appeal to shoppers travelling from longer distances like Sevenoaks.

### Planned Development

The London Borough of Bromley has recently completed phase one of a town centre public realm renewal programme. Works in Bromley North Village – East Street, Market Square and the upper part of the High Street was completed in 2014 at a cost of £5.5 million. Further works are being planned for the rest of the pedestrianized High Street to provide new paving design, seating, lighting and landscaping to improve the visitor experience and attract investment to redevelop surrounding buildings.

- 4.20 A Public Private Partnership between the London Borough of Bromley and Cathedral Group is currently developing Bromley South Central, a new mixed use residential and leisure quarter. It will include 4900 sq.m of landscaped public square, a 2,700 sq.m multiplex cinema, 2,600 sq.m of cafes and restaurants, a hotel, private and affordable apartments and underground car parking – with a key focus on quality of the public realm and the inclusion of public art.
- 4.21 LB Bromley has also prepared an Area Action Plan for Bromley town centre, adopted in October 2010 provides wider policies and proposals. There are also very initial proposals being considered by Transport for London for an extension of the Bakerloo Underground line to Bromley Town Centre.

## Maidstone

- Venuescore Retail Ranking: 51
- Trade draw from survey area: £60.6m

4.22 Maidstone is the county town of Kent and is a major centre for the surrounding rural county and smaller towns. Venuescore ranks Maidstone's position as 51<sup>st</sup> in its 2014-15 Index, and identifies the 'market position' of Maidstone as being 'Middle'. The Experian Goad category report for Maidstone identifies a total of 83,200 sq.m of ground floorspace for retail and service units, comprising 560 outlets. Maidstone acts foremost as a comparison goods centre and performs above average in its provision of comparison outlets, although below average for convenience retail – which is common for more major centres, as we have set out above. Fremlin Walk is the major comparison focused shopping centre featuring around 50 major brands, anchored by House of Fraser and featuring FatFace, Laura Ashley, H&M, River Island, Schuh and Zara. It also features eateries such as Patisserie Valerie, Bills, Pret and Chimichanga.

4.23 A large secondary shopping centre called The Mall provides a wider mix of convenience and comparison retailers including independents to meet more local needs, with brands including Sports Direct, Poundland, The Entertainer, Next and Hawkins Bazaar. Week Street, from which Fremlin Walk can be accessed, is the main pedestrianized shopping street and includes a variety of other independent and multiple retailers – High Street and King Street are two other key shopping streets. Gabriel's Hill, Union Street, Market Buildings and the Royal Star Arcade are all destinations for well-established independent retailers.

4.24 A High Street Regeneration Project was completed by Kent County Council and Maidstone Borough Council from 2012 to 2013 costing £3.1 million. High quality granite paving and street furniture was used in the design to create a pedestrianized environment with only access for buses. Maidstone also has a Town Team, a partnership between Maidstone Borough Council, Maidstone Town Centre Management and local businesses which is engaged in regeneration, culture, events and marketing.

4.25 St Peter's Wharf Retail Park is also situated on the edge of centre next to the River Medway, and includes branches of Wickes, Asda Living, Hobbycraft, TK Maxx and Homebase. Also on the edge of centre next to the River Medway is the successful Lockmeadow Centre, which uniquely combines Maidstone Market with Gravity Trampoline Park, David Lloyd Leisure, Odeon cinema and Hollywood Bowl, alongside eateries Burger King, Fogo Chophouse, Frankie & Benny's, Harry's Kitchen and The Feathers pub.



### Out of Centre Retail in Maidstone

- 4.26 Maidstone Retail Park, includes Argos Extra and Dunelm Mill. The larger South Aylesford Retail Park comprises 15,000 sq.m of retail floorspace and features Homebase, Harveys, Currys PC World, Smyths Toys, Costa Coffee, M&S Simply Food and Oak Furniture Land, adjacent to a 5,016 sq.m Sainsbury's supermarket. London Road Retail Park (7060 sq.m) includes branches of Dreams, Dunelm, Jollyes, Argos and Family Bargains stores.

### Summary

- In this section we have established the key centres which compete for comparison goods expenditure with centres in Sevenoaks District. This has been confirmed through a household telephone survey of shopping patterns, which has been undertaken in support of this study.
- Bluewater Shopping Centre and Royal Tunbridge Wells town centre are the two principal competing destinations, claiming £362.5m and £141.1m respectively of comparison goods spending from the survey area which we have defined for the purposes of this study. The Bluewater Shopping Centre is one of the strongest retail locations in the UK and its proximity to the District is such that loss of spending to this location is entirely to be expected. Bluewater contains flagship stores and international retailers which would not typically be expected to locate in centres in the District. Other key competing centres are Orpington, Dartford, Bromley and Maidstone, although these do not all draw trade from across the entire district, but have a more balanced influence on shopping patterns. We discuss this further later in the report.
- Whilst it is not surprising that many residents in Sevenoaks District undertake their spending at larger/higher-order centres surrounding the District, many of these competing centres are advancing plans to further develop and enhance their retail and leisure offer in the short to medium term. These proposals are likely to further influence the shopping patterns of residents in the District and give added impetus to the need for the District's own Town and Service centres – which we review in the following section – develop and enhance their own offer in order to remain diverse, vital and viable, over the course of the Council's new Local Plan period.

## 5. ASSESSMENT OF CENTRES IN SEVENOAKS DISTRICT

5.1 In this section, we define the role and function of current shopping provision in the Town and Service Centres in Sevenoaks District. Our assessment focuses on the Principal Town Centre of Sevenoaks, the Secondary Town Centre of Swanley, the Rural Service Centre of Edenbridge and the Local Service Centres of Westerham, New Ash Green and Otford, (as defined in the adopted Sevenoaks Core Strategy). We also review the out-of-centre retail provision in the District. Finally, we undertake a high level analysis of provision of the network of Local Service Centres across Sevenoaks, to establish the extent to which they are currently meeting the day-to-day shopping needs of their local communities — this exercise is shown in **Table 5.1**.

5.2 Following this, we set out summaries of the performance of the Town and Service Centres in the District against the 'health check' indicators which National Planning Practice Guidance states should be used to access the vitality and viability of town centres.

Table 5.1 shows key statistics for the centres in Sevenoaks District in terms of number of units, total comparison goods floorspace and Venuescore rankings and market position data. This information is also provided for the key surrounding competing centres, building on the analysis set out in the previous sections.

**Table 5.1: Statistics for centres in Sevenoaks District and key competing centres**

Centre	Position in Sevenoaks Retail Hierarchy	Total number of units	Total comparison floorspace (sq.m net, estimated)	Venuescore Retail Ranking 2014-15	Venuescore Market Position 2014-15
<b>Centres in Sevenoaks</b>					
<b>Sevenoaks</b>	Principal Town	230	12,839	388	Upper Middle
<b>Swanley</b>	Secondary Town	86	4,747	1,096	Lower
<b>Edenbridge</b>	Rural Service Centre	89	2,583	2,306	Upper Middle
<b>Westerham</b>	Local Service Centre	72	2,861	-	-
<b>New Ash Green</b>	Local Service Centre	-	-	-	-

Offord	Local Service Centre	-	-	-	-
<b>Competing Centres</b>					
<b>Bluewater</b>	-	340	155,7011	26	Upper Middle
<b>Royal Tunbridge Wells</b>	-	696	65,635	243	Upper Middle
<b>Orpington</b>	-	270	34,188	290	Lower Middle
<b>Dartford</b>	-	344	38,266	261	Middle
<b>Bromley</b>	-	493	99,898	290	Upper Middle
<b>Maidstone</b>	-	560	83,231	51	Middle

Source: Sevenoaks Core Strategy (2011)/Experian Good Category Reports/Venuescore 2014

### Sevenoaks (principal town centre)

5.4 Sevenoaks is the highest order town centre within Sevenoaks District. It is a historic and cultural market town with a strong mix of shopping, leisure and service uses. Sevenoaks is approximately 14 miles from Royal Tunbridge Wells, 17 miles from Dartford and Bluewater and 30 miles from Central London. Sevenoaks has a Venuescore of 388 in the 2014 rankings and is identified as providing a 'upper middle' retail offer. Examples of similarly ranked centres in the South East include Bognor Regis, Fleet, Dorking and Petersfield.

### Diversity of uses and retailer representation

5.5 The focus of the retail offer in Sevenoaks is centred upon Bligh's Meadow, London Road and the High Street which form a triangle in the centre of Sevenoaks, with a number of small roads and alleyways connecting the main shopping areas. Uses are generally spread throughout the centre, with no clearly identifiable 'quarters' within the town centre. National retailers are found mainly on the High Street with independent retailers focussed on London Road.

5.6 Food and beverage outlets are well distributed throughout the centre. In terms of the quality of the food and beverage offer, there are a range of coffee shops including Costa and Caffé Nero, a café within Marks and Spencer, and one within Waitrose in addition to a good range of independents. In terms of restaurants there is a good range of higher quality national chains including Cote Brassiere, and Loch Fyne, again supported by a good independent offer. There is also a strong mid-range restaurant offer, with national chains such as Wagamama, Pizza Express, Prezzo and Zizzi located within the centre. A new Nando's restaurant is opening in Bligh's Meadow later this year.

- 5.7 In terms of the fashion retail offer within Sevenoaks town centre, there are a number of higher quality fashion retailers including Crew Clothing, Fat Face, Mint Velvet and Phase Eight. The main fashion retailer within the centre is Marks and Spencer other retailers present in centre include; M&Co, White Stuff, Monsoon and Laura Ashley, The centre is lacking mens fashion retailers. In addition to fashion, Sevenoaks has a good homeware offer for the size of the centre, with a number of outlets such as Robert Dyas, Leicht, Waitrose home and The Hardware Centre.



Sevenoaks town centre

- 5.8 Sevenoaks is not overly dominated by charity shops, there are a few on the High Street such as Cancer Research, The Children's Trust and Oxfam, however these appear to contribute positively to the High Street, with relatively attractive shop fronts.
- 5.9 Sevenoaks has retained a good representation of services. Estate Agents are well distributed throughout the town centre; there is also a good range of banks located within the town centre, with Natwest, HSBC, Barclays, Nationwide and Halifax all with centre branches in centre.

- 5.10 In terms of food stores, Sevenoaks has a large Waitrose store (2,208 sq.m net) located off the High Street, with fish, cheese, delicatessen, olive, rotisserie, butcher and bakery counters. The Waitrose store has a dedicated kitchen/homewares shop, in store café and its own car park. The store also offers additional services such as glass and fish kettle loan and dry cleaning and laundry services.
- 5.11 The other major town centre food store is the Tesco Metro (1,897 sq.m) located on High Street. This is a relatively large format Tesco Metro with a small clothing range which occupies the entire width of the store's frontage to the High Street. Marks and Spencer also has a food hall. There are a small number of other food outlets within Sevenoaks including Cook, and health food stores.
- 5.12 In terms of leisure, the offer within Sevenoaks appears proportionate to the size of the centre. Whilst the night time economy was not assessed as part of this study, it could be assumed, that it is relatively strong, given the number of public house and restaurants that are distributed throughout the centre. The Stag Cinema is a community arts centre, cinema, theatre and live entertainment which includes two digital screens and shows new releases. However, there is not a solely dedicated cinema facility located within Sevenoaks town centre, and this represents a gap in the purpose built offer of the centre.

#### Vacancy Rates

- 5.13 The Experian Goad Category Report for Sevenoaks (June 2015) identifies the centre as having a vacancy rate of 7.8%<sup>3</sup>, below the current national average of 11.2%. There are no concentrations of vacant units within the centre. Experian data (June 2015) suggests that there is a total of 1,858 sq.m vacant floorspace within the town centre, of an estimated 41,313 sq. m of floorspace, equivalent to 4.4% of the floorspace in the centre. Again, this total is below the current UK average of 11.2%.

#### Customer's views and behaviour

- 5.14 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research in June 2016. The survey was undertaken in three different locations (between Wagamama and Tesco Metro on High Street, Bligh's Meadow (Laura Ashley area) and Halifax/Lloyds Bank/Chequers Pub (High Street area) within Sevenoaks town centre with a sample size of 100. The key findings from this exercise were as follows:

<sup>3</sup> Based on the Experian Goad definition of the town centre boundary. It should be noted that these boundaries do not always reflect local planning policy boundaries.

- The survey found that 95.0% of visitors to Sevenoaks come from home.
- There is a good mix of activities being undertaken within the town centre including food shopping (37.0%), non-food shopping (33.0%), general browsing (15.0%) and those that work within the area (18.0%).
- The main stores visited include Tesco (45.8%), Marks and Spencer (27.1%), Waitrose (18.6%) and Boots (11.9%).
- In terms of car parking, Bligh's Meadow is the most popular choice with 22% of respondents stating that they parked here. When questioned regarding whether they could park in their preferred car park, 68.4% stated that they could park in their preferred location, suggesting that provision is, for the most part, adequate.
- When questioned about what they liked about the town centre, 28.0% stated that they liked the attractive/pleasant environment in Sevenoaks town centre, whilst 24.0% stated that they liked Sevenoaks because it is close to home. Other aspects of the town centre which scored highly include the good layout/shops being close together (11.0%), good range of smaller independent specialist retailers (11.0%), good quality shops (11.0%) and the centre having good places to eat (11.0%).
- In terms of dislikes about the town centre, very positively 49.0% of respondents stated very little, with a further 22% stating the cost of parking. A further 9.0% stated traffic congestion and 4% a lack of parking. The above findings suggest generally high levels of satisfaction with the town centre amongst its users.
- Looking to what respondents felt could be improved in the town centre, again, positively, 34.0% stated nothing in particular, whilst 11.0% stated a better choice of shops. A further 9.0% stated that they didn't know what could be improved within the centre, with a further 6% stating that there was no need to improve the centre and 8.0% stated that there needed to be more car parking in Sevenoaks town centre. Again, the relatively low percentage identified here indicates that most users of the centre are satisfied.

#### Pedestrian flows

- 5.15 The highest pedestrian flows were observed within the lower levels of Bligh's Meadow development (specifically the Marks and Spencer end of the development) and a number of the side streets which run between London Road and the High Street. The lowest pedestrian flows were observed on London Road; this may have been due to the time of day of the site visit and the nature of the offer on this side of the town centre being mostly centred upon less well-known brands, and a number of restaurants/evening economy use.

#### Accessibility

- 5.16 Sevenoaks town centre is relatively constrained due to its development between London Road and the High Street. As a consequence car parking is limited within the town centre to Bligh's Meadow, the Leisure Centre, Buckhurst Car Park and Waitrose. Whilst the town centre is relatively accessible, it would appear that at peak times it suffers from congestion on the main arteries from the A25 (London Road and A225).
- 5.17 Sevenoaks town centre is approximately a 15 minute walk from the train station, however the route is easily navigable as it follows London Road. There is scope to improve directional sign posting between the station and town centre.
- 5.18 The town centre is well served by buses, with the bus interchange located on Buckhurst Lane, off the High Street in Sevenoaks town centre. The town centre is served by ten bus routes. Buses provide connections to the surrounding urban area, as well as nearby centres such as Tonbridge, Bluewater (evening service only), Kemsing, Westerham and Farningham.

#### Perception of safety and occurrence of crime

- 5.19 The town centre is well integrated with the rest of the town; there is an element of residential use within the centre and its immediate surroundings. The town centre is well maintained, and there is no feeling within the centre that it particularly needs investment, or that there are pockets with poor natural surveillance that attract crime or anti-social behaviour, at least during daylight hours.

#### State of town centre environmental quality

- 5.20 Sevenoaks is a historic town centre, and as such the street design and layout reflects the age of the town centre. Much of the town centre is located within the Sevenoaks High Street Conservation Area. Pavement widths, particularly on London Road are quite narrow, reflective of the age of the town centre. The attractive triangular space between London Road, Bligh's Meadow and the High Street acts as a pedestrianised centre. The pavement width on the High Street is wider in most places than that on London Road, and feels more accessible.
- 5.21 The environmental quality of the town centre is good, there are a number of attractive shop fronts, and hanging baskets distributed throughout the town centre. The town centre would benefit from a more unified approach to the public realm – the approach to paving has not been consistent throughout the town centre, neither has the approach to street furniture and bollards. Bligh's Meadow currently feels slightly disjointed from the rest of the town centre, mainly due to the development being centred around the car park.



## Swanley (secondary town centre)

- 5.22 Swanley is the secondary town in Sevenoaks District and is located close to the edge of Greater London, in close proximity to Dartford (approximately 5 miles away). Swanley is ranked in 1,096th position in the Venuescore Retail Rankings (2015), with a 'lower' market position, indicating that the overall quality of the retail offer is relatively downmarket.
- 5.23 One of the largest land owners in Swanley, U+I PLC have recently submitted a planning application for the redevelopment of Swanley Square, which forms the principle shopping area of Swanley town centre. The proposed redevelopment will be a phased redevelopment of part of the Swanley Shopping Centre to provide 340 residential units and 4, 346 sq.m retail floorspace. The application is under determination at the time of writing.



Swanley Square Shopping Centre

### Diversity of Uses and Retailer Representation

- 5.24 As noted above, the focus of the retail offer in Swanley is centred upon Swanley Square. This is a purpose built, pedestrianised 1960's shopping centre. There is a further retail offer on High Street and Station Road, however, the quality of this diminishes from that of Swanley Square, and it feels detached from its main pedestrianised centre.
- 5.25 Anchored by a large Asda store (5,460 sq. m net), the Swanley Square has a good range of lower quality retailers including Wilko, the Card Factory, Poundland, Superdrug and Iceland. The centre also offers banks, chemists and a range of food and beverage outlets most fast food and hot food takeaways. There is also an Aldi (650 sq.m), located slightly outside of the Swanley Square. Swanley also has an outdoor market held within Swanley Square every Wednesday between 8am- 3pm. The retail offer on High Street and Station Road is largely dominated by take-aways and beauty salons, and is for the most part poor quality.

### Vacancy Rates

- 5.26 Experian Goad data suggests that Swanley has a low vacancy rate at 2.3%, 8.9% below the national average of 11.2% (Goad, September 2015). There are no concentrations of vacant floorspace, of the total floorspace in Swanley (24,712 sq.m), there was only 241 sq.m vacant at the time of the Experian Goad survey. Our own conclusions from visiting the centre suggest that the vacancy rate remains low.

### Customer's views and behaviours

- 5.27 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in two different locations (Costa/Swanley Square/Asda entrance area, and High Street) within Swanley town centre with a sample size of 50. The key findings from this survey were as follows:

- The in centre survey results for Swanley indicate that the majority of respondents visit the centre from home (96.0%), with 4.0% visiting from work.
- It would appear that the main draw is Asda, with 80.0% of respondents stating that the main purpose of their visit to Swanley was for food shopping. 38.0% of respondents stated that their main purpose for visiting the centre was for non-food shopping, 16.0% for general browsing and 14% for financial services.
- A core of five stores provide the main draw for Swanley with 85.7% of respondents stating that they would visit Asda, 21.4% Wilkinsons, 16.7% Poundland, 9.5% Iceland and 7.1% Aldi during their visit to the centre.

- The majority of visitors arrive at the most popular centre via car/van as the driver (66.0%) with 22.0% arriving on foot. Asda has the most popular car park; with 87.9% of visitors in Swanley using this car park our own observations confirmed this car park to be noticeably busy at the time of our visit. 72.7% of respondents could park in their preferred car park.
- In terms of what respondents like about the town centre, 34.0% of respondents stated that they liked that Swanley was located close to home, followed by 26.0% stating that it was compact/easy to get around. 20.0% of respondents stated that they liked the layout of the centre and that the shops were close together. 22.0% of respondents stated that they like shopping in Swanley because it is easy to park, with a further 14.0% of respondents stating that they liked the markets held at Swanley.
- In terms of dislikes, 32.0% of respondents stated that they disliked nothing/very little about the centre, whilst 22.0% stated that there are not enough shops in Swanley. 16.0% of respondents stated that they disliked the amount of litter within the centre, and that it was dirty, with a further 10.0% mentioning vandals and hooligans. 10% of respondents stated that there are not enough clothes shops in Swanley. Accordingly, these represent areas for potential qualitative improvements in the centre.
- When making suggestions for improvements, 34.0% stated nothing. 22.0% of respondents stated that it would be improved by a better choice of shops, with 6.0% of respondents stating that the centre would benefit from larger shops and department stores, with another 6.0% suggesting that Swanley could be improved from better maintenance/cleanliness and more pubs and restaurants respectively.

#### Pedestrian Flows

- 5.28 The health check was undertaken on a Wednesday, on market day. Pedestrian footfall observed indicated that the centre was crowded and the shops appeared to be busy. We have however also undertaken visits to the centre on a non-market day and there is a noticeably reduced level of activity. We are not aware of any footfall data for the centre. It is clear that the market makes an important contribution to the vitality and viability of the centre and is a major driver of footfall. Footfall around the entrances to Asda was also found to be strong, reflecting the store's role as the clear anchor store within the centre.

#### Accessibility

- 5.29 Swanley is well connected to the surrounding area via the A20 and M25, however it is clear that the centre suffers from parking issues, particularly on market day, within the Asda car park. This is most likely due to free parking being available within the Asda car park, with the Swanley Shopping Centre Car Park also being relatively cheap for short stay at 25p per hour. A more

coordinated approach to parking across the centre which allows for free short –stay parking (up to one hour) might be beneficial.

- 5.30 The location of bus stops was reviewed as part of the health check – Swanley is served by buses from locations such as Tonbridge, Bluewater, Eltham, Dartford, Gravesend, Maidstone, Sidcup and Orpington. The centre is well served by rail connections, with Swanley station being located within a 10 minute walk of the town centre, connecting to Sevenoaks, Canterbury (via Maidstone East and Ashford), and Central London.

#### Perception of safety and occurrence of crime

- 5.31 Following the review of the in centre survey results, it is clear that crime and anti-social behaviour within the Swanley Shopping Centre is of concern to visitors, this particularly appears to be an issue in the Swanley Centre. As the shopping centre dates from the 1960's and is rather inward facing and lacks natural surveillance, which could be an issue at night.

#### State of town centre environmental quality

- 5.32 It is clear that particularly on market day, litter is a problem within the centre. Additionally, the market makes legibility within the centre problematic and restricts pedestrian flows. This said the market appears to be a significant footfall driver. Due to the age of the centre, the environmental quality is relatively harsh in nature and could be softened through urban greening and improvements to the design of the public realm, and the Council should seek to ensure improvements to this as part of any redevelopment of the centre.

#### Edenbridge (rural service centre)

- 5.33 Edenbridge is identified as a rural service centre within the Sevenoaks Core Strategy (2011), and is the main centre in the south of the District. The centre is a small, traditional linear town centre, focused mainly upon the High Street. In the 2014 Venuescore rankings, Edenbridge was ranked in 2,306th position, with a market position classification of 'upper middle', suggesting it has a high quality retail offer.

#### Diversity of uses and retailer representation

- 5.34 Edenbridge has a good range of services for the size of the settlement. Whilst it would appear that a number of banks have closed in recent years, the centre has retained a Lloyds Bank branch. There are a number of public houses, a post office and some charity shops located within the centre. There are a number of antiques shops, particularly located around Church

Street. The centre is lacking in its range of comparison goods offer but this reflects the relatively small size of the centre.

- 5.35 In terms of convenience goods, there is a Tesco Express (412 sq.m) located off High Street, and a medium sized Waitrose (1,151 sq.m) whilst being disconnected from the centre, appears to act as the 'anchor store'. It is also noteworthy that the store provides 2 hours free parking.

#### Vacancy Rates

- 5.36 The most recent Experian Goad Survey of Edenbridge town centre was undertaken in December 2013. At the time of the Experian Goad Survey, the vacancy rate was identified as being 14.6% above the national average of 11.2%. Positively it would appear that subsequent a number of units identified as vacant on the Goad Plans (December 2013) have since been filled where existing businesses have expanded into adjacent vacant units.

#### Customer views and behaviour

- 5.37 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS market research in the centre in June 2016. The survey was undertaken in two different locations within Edenbridge town centre (Waitrose and outside Tesco Express on the High Street) with a sample size of 50. The key findings from the survey are as follows:

- 84.0% of respondents stated that they visited the town centre from home, whilst 12.0% of respondents stated that they visited the centre from work, with 4% having visited the centre from friends/family homes.
- With regards to the purpose of the visit to the town centre, 66.0% of respondents stated that they were visiting the centre to undertake food shopping, 26.0% to undertake non-food shopping, and 18.0% general browsing. Reflective of the food and beverage offer within the centre, 10% of respondents stated that their main purpose was to go to a café/restaurant, whilst 12% stated that they worked within Edenbridge.
- In terms of the main stores which visitors to the centre were planning to use, 44.4% of respondents stated that they were visiting Waitrose, 41.7% stated Tesco, 11.1% stated the Post Office, and 22.2% stated Boots. This confirms the important role the supermarkets play as an attraction of footfall.
- With regards to parking, 79.3% of respondents could park in their preferred car park.
- Turning to likes and dislikes, 18% of respondents stated that they liked the attractive and pleasant environment in Edenbridge, 16.0% stated nothing/very little. 8.0% of respondents stated that they liked the free/cheap parking, with a further 6% stating a

good range of smaller independent/specialist retailers. 22.0% of respondents stated that they did not think that there was a big enough choice of shops, whilst 18.0% stated nothing/very little.



Edenbridge town centre

#### Pedestrian flows

- 5.38 In terms of pedestrian flows, the health check was undertaken mid-morning, which may have impacted upon observations. The High Street itself appeared relatively quiet, although towards midday the centre became significantly busier appearing to attract passing trade. This was particularly true of observations at the Waitrose store. The highest levels of footfall were observed in the vicinity of the Waitrose store, confirming the role of this store (along with the smaller Tesco Express) as the centre's anchor.



**Accessibility**

- 5.39 Edenbridge is centred upon the High Street which is on the B2026. As the centre is a linear settlement there is not much on street parking. There is however a good level of parking provision within the Waitrose car park, which is free for 2 hours regardless as to whether the car driver is a Waitrose customer. As this car park appears to provide the majority of the car parking within the centre, links could be improved through a walkway from the High Street.
- 5.40 In terms of public transport, Edenbridge town centre is a short walk from the train station. The centre is served by buses that go to Tonbridge, Royal Tunbridge Wells, Oxted, East Grinstead, Sevenoaks and Hever.

**Perception of safety and occurrence of crime**

- 5.41 As Edenbridge is a linear centre, it has good natural surveillance. There are a few side streets, however again these appear to be adjoining residential properties. There are no signs of graffiti or vandalism.

**State of town centre environmental quality**

- 5.42 Edenbridge is a historic centre, with a number of attractive buildings. The centre could benefit from some improvements to shop fronts, however, most are in generally good repair. The centre could also benefit from more planting, and unified street furniture, a number of food and beverage operators have outside eating areas, which could be developed more to create a 'café culture' environment.

**Offord (local service centre)**

- 5.43 Offord is identified as being a local service centre within the Sevenoaks Core Strategy (2011). It is a historic and attractive village centred upon an attractive duck pond.

**Diversity of uses and retailer representation**

- 5.44 The centre has a good food and beverage offering in the form of café and tea rooms and public houses. For the size of the settlement there is a relatively limited convenience offer, however this may be due to the close proximity of a large Sainsbury's (on Offord Road approximately 1 mile from the centre, on the edge of Sevenoaks urban area. Having said this there is still a post office, pharmacy and One Stop convenience store located within the centre.

- 5.45 There are a number of antique shops located within Offord, in a similar way to Edenbridge, there is potential for the specialist offer of vintage/antique goods in Offord to be developed. There are also a few boutique/fashion retailers within the centre. The retail offer is good in terms of specialist items, but lacking in day to day items. Offord has retained a Post Office, but is lacking in other services such as banks.

**Customer's views and behaviours**

- 5.46 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within Offord town centre with a sample size of 25. The key findings from the survey are as follows:
- The purpose of the visit to the centre ranged from 32.0% visiting to undertake food shopping, 12.0% undertaking non-food shopping, and 36% using financial services.
  - The main stores respondents had visited include Post Office (45.5%), Charity Shops (27.3%), and Lloyds Bank (9.1%).
  - In terms of how respondents travelled to the centre, 56.0% arrived by car, 8.0% cycled and 36.0% walked. Of those respondents who parked within the centre, 78.6% of respondents parked on Sevenoaks Road, 14.3% on the High Street, and 7.1% in the Warham Road Car Park. Respondents stated that they parked in their preferred car park, indicating that car parking provision in the centre is likely to be sufficient.
  - Turning to what respondents liked about the centre, 68.0% of respondents stated that they liked the attractive and pleasant environment within the centre, 24% stated that it was easily accessible on foot/or by bike. 20% stated everything and 20% stated the historic environment.
  - In terms of dislikes, 56% stated nothing/very little 12.0% traffic congestion, 12.0% lack of parking, 16.0% stated that it was difficult to cross the street and 12.0% stated that there were few traffic free areas.
  - Positively, 56.0% of respondents stated that there was nothing that could be improved within the centre, 12.0% stated that the centre would benefit from more car parking, with a further 8.0% stating that the centre would benefit from more traffic free areas. Levels of satisfaction amongst users of the centre are therefore for the most part quite high when considering the locations role and function which the centre plays.





Otford

### Vacancy Rates

- 5.47 There is not any Experian Goad data available relating to vacancy rates in Otford. A vacancy check was undertaken as part of the health check visit, and no units were found to be vacant.

### Pedestrian Flows

- 5.48 There appeared to be a constant flow of visitors parking in Otford Village Car Park. There also appeared to be a good flow of people going to the food and beverage outlets in the centre. For the size of the centre, we consider pedestrian flows to be generally good.

### Accessibility

- 5.49 Otford has good amenities, centred upon a cricket club, childrens play park, tennis courts and grass area, where there is a large car park with free parking for an hour. The centre is within close proximity to Sevenoaks, located off the A225. Otford train station is located within a 10

minute walk of the village centre. The centre is served by buses that go to destinations including East Grinstead, Reigate, Oxted, Caterham, Westerham and Biggin Hill.

### Perception of safety and occurrence of crime

- 5.50 Due to the linear nature of the centre, it would appear that the centre is relatively safe and that the occurrence of crime is low. It is possible that the area around the Post Office may be more susceptible to crime, as natural surveillance is rather low in comparison to other areas of the town centre.

### State of town centre environmental quality

- 5.51 Otford is an attractive, historic centre. The row of shops including the Post Office appears to be a more modern addition to the centre. A main road bisects the centre, meaning that accessibility between the two sides of the road is quite difficult. Additionally the pavement is quite narrow in places meaning that pedestrian comfort is limited.

### Westerham (local service centre)

- 5.52 Westerham is identified as being a Local Service Centre in the Sevenoaks Core Strategy. Westerham is recorded as early as the 9th Century and is known for being the largest settlement within close proximity to Chartwell, the principle residence of Sir Winston Churchill.

### Diversity of uses and retailer representation

- 5.53 Westerham's convenience goods offer comprises the Co-op, a small branch of Nisa and Westerham Village Stores and a number of smaller independent stores such as greengrocers and butchers. The comparison goods offer in Westerham is largely centred upon independent fashion retailers, interior design companies and gift shops and there are no national comparison goods retailers present in the centre. Its retail offer is therefore relatively specialist, which helps the centre to have a relatively unique feel and sets it apart from some the higher order centres.

- 5.54 In terms of the food and beverage offer in Westerham, this is centred upon a number of independent tea rooms in addition to a branch of Costa. There are also a number of public houses and independent restaurants located within the centre. The food and beverage offer of the centre is clearly a big attraction of the centre, with 28.0% of respondents stating that they had visited a café/restaurant for lunch in the in centre survey (discussed below further) – the most popular reason for visiting the centre.

### Customer's views and behaviours

- 5.55 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within Westerham town centre with a sample size of 25. The key findings from the survey are as follows:
- The in centre survey indicates that the majority of visitors to the centre come from home, with 96.0% of respondents stating this, with 4.0% travelling from work.
  - The most popular responses to the question regarding the main purpose of the visit to Westerham varies from going to cafes/restaurants for lunch (28.0%), non-food shopping (24.0%) and food shopping (24.0%).
  - The main stores visited within the centre range from the Co-op (27.3%), Fringe Benefits (hairdressers) (9.1%), Nisa (54.5%) and The Chocolate Shop (9.1%).
  - In terms of how they travelled to the centre, 40.0% of respondents indicated that they had driven by car to the centre, 16.0% as a car passenger, and 44.0% of respondents walked to the centre. There were a range of locations for car parking, with 14.3% of respondents parking with friends and family, 21.4% of respondents using the Lower Car Park, 42.9% of respondents using on street parking, 14.3% of respondents using the Vicarage Hall Car Park and 7.1% getting dropped off at the centre. 84.6% of respondents stated that they parked in their preferred car park, with a further 15.4% of respondents stating that they did not have a preferred car park.
  - With regards to what respondents liked about the centre, 20.0% stated that they liked that it was close to home, with 48.0% stating that it was an attractive and pleasant environment. 16.0% of respondents stated that the centre was compact/easy to get around, another 16.0% stated that there was a good layout, and a further 16% stated that they liked that there were good quality shops. These are all positive reflections of the vitality and viability of the centre and suggest many local residents enjoy the experience of visiting the centre.
  - Turning to dislikes, 32.0% of respondents stated nothing, 8.0% the cost of parking and 8.0% traffic congestion. A further 16.0% stated that they thought there was a lack of parking, with another 16.0% stated that there was a problem with commercial traffic.

### Vacancy rates

- 5.56 Experian Goad data (September 2014) indicates that the vacancy rate in Westerham is 2.8%, well below the national average of 11.2%. No vacant units were noted during our visit to the centre.

### Pedestrian flows

- 5.57 The centre appeared to be very quiet during the health check visit; however, this could have been due to the time of day of the visit and weather. The centre is an easily accessible size, and easy to navigate around for pedestrians.

### Accessibility

- 5.58 The centre is not particularly easy to access with limited on street car parking. There is however a large car park off Brasted Road, which is a short walk from the centre of Westerham. Westerham is accessible from the M25, however it doesn't have a train station. Buses that service the centre include destinations such as Tonbridge, East Grinstead, Sevenoaks, Redhill and Oxted.



Westerham

### Perception of safety and occurrence of crime

- 5.59 The centre is largely a linear centre and as such benefits from good levels of natural surveillance.

### State of town centre environmental quality

- 5.60 Nearly 50% of respondents to the in centre survey stated that they liked the environmental quality of the centre. The state of the town centre is good, however there is room for improvement. A more unified public realm strategy would improve the centre aesthetically, although the central green is an attractive space at present. Coordinated benches, street lamps and bollards could further improve the environmental quality of the centre.

## New Ash Green (local service centre)

- 5.61 New Ash Green is a purpose built 1960's shopping centre – it was an innovative development project for its time, however it would appear to have suffered from lack of investment in recent years and the centre now suffers from a generally poor environmental quality. New Ash Green is identified as being a Local Service Centre within the Core Strategy.



New Ash Green Village Centre

### Diversity of uses and retailer representation

- 5.62 The retail offer in New Ash Green is mainly convenience based with a good sized Co-op anchoring the centre. The centre has a Lloyds Bank branch, Vintage Barn (gift shop) and Post Office. In terms of a food and beverage offer, the centre has a number of cafes, take aways and a public house.

### Customer's views and behaviours

- 5.63 To further inform the findings of our study, an in centre visitor's survey was undertaken by NEMS Market Research. The survey was undertaken in three different locations within New Ash Green town centre with a sample size of 25. The key findings from the surveys were that:
- In terms of reasons why respondents were visiting the centre, 80.0% were planning to undertake food shopping, 24.0% non-food shopping (presumably gift shopping), 8.0% financial, and a further 8.0% visiting the leisure centre. The main stores visited amongst respondents include the chemist (5.0%), the Co-op (90.0%), Oxfam (10.0%) and the Pet Pantry (15.0%).
  - 64.0% of respondents stated that they all travelled to the centre as a car driver, with 36.0% stating that they arrived on foot. 100.0% of those who drove to the centre stated that they used the Centre Road Car Park, which was their preferred car park.
  - In terms of what respondents like about the centre, 60.0% stated that it was close to home, 12.0% stated nothing/very little. The next most popular responses included easy to park (8.0%), good quality shops (8.0%), not too busy (8.0%), clean/litter free (8.0%), everything I need is here (8.0%), and good leisure facilities (8.0%).
  - Turning to dislikes, 52.0% stated that the centre was run down, 24.0% stated that they felt as though it was unsafe/dangerous, 24.0% stated that they felt that there were not enough shops, and a further 24.0% stated that there was litter/dirty/dogs problem. These are the highest levels of dissatisfaction observed of any of the centres within Sevenoaks District and point to a number of areas where improvement in the centre is clearly required.
  - It is clear that there are suggestions as to how the centre could be improved, 24.0% of respondents stated that there could be a better range of shops, with a further 24% suggesting that the entire centre should be refurbished. 16.0% stated that security should be improved within the centre, 12.0% stated better youth facilities, 12.0% stated better maintenance/cleanliness, and a further 12.0% stated that they felt that the centre would be improved if there were local landlords. Again, this points to a clear need to improve a number of aspects of the centre in order to improve its attractiveness to and satisfaction from the local residential community.

### Vacancy rates

- 5.64 Vacancy data is not available from Goad for this centre, so precise vacancy figures cannot be derived. A vacant unit check was undertaken as part of the health check, it would appear that the centre is struggling to retain retailers, as there are a number of vacant units at present – our data would suggest that approximately one third of units are currently vacant.



**Pedestrian flows**

- 5.65 A good level of pedestrian activity was observed within the centre, although this may have been due to the health check being undertaken during the lunchtime period.

**Accessibility**

- 5.66 The centre of New Ash Green has largely been designed to cater for the needs of the local community, and as such is not easily accessible by car from anywhere other than New Ash Green. The shopping centre is located within the centre of the village and is inward facing, typical of many 1960's shopping centres.
- 5.67 New Ash Green is connected to Dartford and Bluewater by the 423 bus, which provides a regular service. There are additionally a number of other services, including Meopham, Gravesend, Borough Green, Sevenoaks and Maidstone. New Ash Green does not have a rail link; however, New Ash Green is located within easy driving distance of Longfield, Meopham and Sole Street Railway Stations.

**Perception of safety and occurrence of crime**

- 5.68 Due to the number of vacant units within New Ash Green, the centre does not feel as though it benefits from good levels of natural surveillance. The layout is irregular, and could lend itself to anti-social behaviour, due to the inward nature of the centre. It is clear from reviewing the in centre survey that security within the village centre is a concern – 8.0% of respondents stated that vandals/hooligans were a concern, with a further 8.0% stating that they felt that the centre was unsafe, has poor security and is dangerous. A further 16.0% of respondents stated that gangs of children within the centre were of concern. Further reiterating concerns regarding safety and the occurrence of crime, when suggesting improvements to the centre, 16% of respondents stated that the centre should improve security/improve CCTV. These therefore point to a number of concerns about the safety of the centre from its users and it is agreed that, particularly outside of retail trading hours this may be an area of concern for the centre.

**State of town centre environmental quality**

- 5.69 The centre does not appear to be well maintained, a number of the units appear dated. The provision of street furniture could be improved, particularly through increasing the number of bins and benches within the centre. The centre has a good level of planting, giving the centre a sense of being in woodland. The centre would benefit from an aligned public realm strategy. Indeed, it is clear from the results of the in centre survey that many respondents feel that the town centre environmental quality of the centre needs to be improved, with 48% stating that it

is run down. In terms of improving the appearance and environment of the centre, 12% of respondents suggested that this is necessary. A further 24% suggested a complete refurbishment of the centre, which it is understood that the Council are currently looking into.

**Service Villages & the rural economy**

- 5.70 We have also undertaken a high-level assessment of the next tier of centres in the District's retail hierarchy, which are 'Service Villages' (see Table 2.1 for a full schedule of the network of Service Villages in the District). For these centres we have undertaken a desk-based assessment which considers the presence/availability of 14 key local facilities within each settlement – for example a supermarket/small convenience store, newsagent, post office, pharmacy, ATM, café, public house, take-away, doctors surgery and library – in order to establish the extent to which the Service Villages are meeting local residents' day to day needs.
- 5.71 At Appendix I (Volume 2) we set out a matrix assessment of the provision of these facilities within each of the Service Villages. The key conclusions from this assessment are:
- The majority of Service Villages have a relatively limited range of facilities, with between 2 and 4 of the 14 key facilities present in any one centre.
  - The Service Village with the most facilities is West Kingsdown, where six facilities are present – a small convenience store, a newsagent/off licence, pharmacy, dry cleaners, public house and take-away. The centres of Kemsing and Sundridge have 5 of the 14 key facilities present.
  - Some Service Villages are much more poorly provided for, with Leigh having none of the key facilities present and Horton Kirby just one (a public house).
  - The centres of Horton Kirby, Leigh and Shoreham do not have any form of local shopping provision, e.g. a small-format convenience store or a newsagent/off licence.
- 5.72 In addition, there are a number of small farm shops within the area, with the four largest being Chart Farm (Seal Chart), Polhill Farm (Badgers Mount), Stonepitts Farm (Seal Chart) and The Hop Shop (Shoreham). Of these, the Hop Shop appears to be the most destination style location, with the Hop Shop, offering a range of food, gifts and even tours. These locations, whilst not such defined centres, also make an important contribution to the variety of the retail offer available within the district, and can also act as attractions in their own right.

## 6. SURVEY AREA, SHOPPING PATTERNS AND POPULATION & EXPENDITURE GROWTH

6.1 In this section we introduce the key inputs which form the basis of our assessment of the 'need' for new comparison and convenience goods retail floorspace in Sevenoaks District. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the survey area are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs below, and the findings are subsequently set out in Sections 7 and 8 (for comparison goods and convenience goods capacity forecasts respectively). The findings of this section should be read in association with the capacity tabulations at Appendix II (for comparison goods) and Appendix III (for convenience goods) in Volume 2.

### Calculation of quantitative 'need'

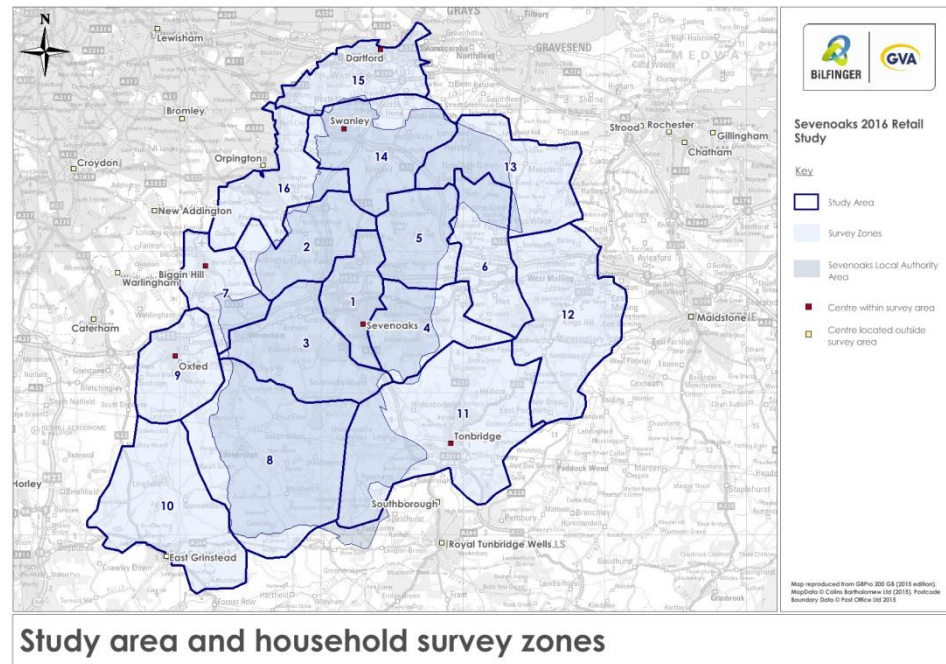
The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. The key stages of the quantitative need assessment are set out in the diagram on the opposite page.



## Survey Area and Household Survey

6.3 As noted above, in order to determine the 'need' for new floorspace, a household telephone survey is required to establish the current shopping patterns of residents. In order to determine this, we have established a 'survey area', which covers Sevenoaks District in its entirety, as well as parts of adjacent authorities in instances where these authorities' own evidence base studies have identified that some residents look towards centres in Sevenoaks for some of their shopping needs. A plan of the survey area is shown in **Figure 6.1** (a larger version is reproduced in Volume 2). A total of 1,600 household telephone surveys were undertaken by NEMS Market Research during June 2016. In order for detailed analysis of shopping patterns at the local scale to be undertaken, the overall survey area has been split into sixteen survey zones.

Figure 6.1: Survey area



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6.4 The Sevenoaks District boundary is also shown on Figure 6.1, and it can be seen that zones 1, 2, 3, 4, 5, 8 and 14 fall wholly or mostly within Sevenoaks District. Survey zone boundaries have

been defined by postcode sectors, and each of the Town and District Centres in Sevenoaks is sited within a different zone, as follows:

Zone	Town/District Centre
Zone 1	Sevenoaks
Zone 2	Shoreham
Zone 3	Westerham
Zone 4	Seal
Zone 5	West Kingsdown
Zone 8	Edenbridge
Zone 14	Swanley

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6.5 In order to maintain consistency with the Council's previous evidence base studies, the boundaries of the overall survey area, and the subdivision into survey zones, are both unchanged.

## Estimates of Population in the Survey Area

6.6 For the purposes of our quantitative needs assessment, we have utilised population forecasts provided by Experian. These are past trends-based population forecasts (applied to Office of National Statistics population and National Population Projections), and are consistent with equivalent inputs into other Local Plan evidence base studies which the Council has commissioned. Table 1 in Appendix II shows the current and projected population for each of the zones which together comprise the survey area shown in Figure 6.1. The total current population (at 2016) in the survey area is 406,923 persons. Based on population projections provided by Experian, this will increase to 474,442 persons by 2035 (the end of the study period). This represents a growth in population of 67,519 persons.

## Available Expenditure in the Survey Area

6.7 Experian identify a 'per capita' spend on comparison and convenience goods on a zone by zone basis, and these are shown in Table 2 of Appendix II for comparison goods, and Table 2 of Appendix III for convenience goods.

- comparison goods per head spend ranges from £3,760 in zone 15 (Dartford) to £5,430 in zone 2 (Shoreham). The average spend per head across the survey area is £4,600. These are high levels of spend per head (the UK average spend per head on comparison goods is £3,353) and confirm the survey area is, taken as a whole, an affluent area (all figures 2016 in 2014 prices)
- convenience goods per head spend ranges from £2,157 in zone 15 to £2,654 in zone 2 (Shoreham) compared to a UK average convenience goods spend per head of £1,981 (all figures 2016 in 2014 prices).

6.8 It is expected that spend per head on comparison and convenience goods will increase over the course of the study period, although growth in convenience goods is expected to be relatively limited. Therefore, we apply an annual growth rate to the 2016 baseline figures (as summarised above), which reflects expenditure growth rate projections set out in Experian's Retail Briefing Note 13 (October 2015). These are shown in Table 2 of Appendix II and III.

6.9 The figures set out in Table 2 of Appendix II and III have also been discounted to include allowance for 'special forms of trading' (SFT), such as online shopping. Experian forecast that this currently (2015) accounts for 11.7% of comparison goods spending, and 2.8% of convenience goods spending, and expect this to increase over the course of the study period to 14.3% for comparison goods by 2035, and 6.4% for convenience goods by 2035<sup>4</sup>. Experian forecast that comparison goods SFT will peak at 15.2% of comparison goods spending in 2022, before decreasing over the period to 2035 as the market reaches saturation, that is to say, everyone who can participate in online shopping will, by this point be doing so. Experian forecast that convenience goods SFT will increase incrementally over the period to 2035. Table 2 of Appendix II and Appendix III summarise the 'with' and 'without' expenditure figures, and also shows the deductions we have made for SFT over the duration of the study period based on Experian's guidance.

6.10 By applying the population forecasts to the per capita expenditure forecasts, we can gain an understanding of the total amount of spending on comparison and convenience goods which is currently available to residents of the survey area, and how much this is expected to increase over the course of the study period:

- There is currently £1,543.5m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £3,224.6m by the end of the study period (i.e. 2035), equivalent to a growth in comparison goods spending of £1,681.2m; and

- There is currently £902.5m of convenience goods expenditure available to residents of the survey area, which is expected to increase to £1,036.3m by the end of the study period, equivalent to a growth in convenience goods spending of £133.8m.

## Shopping patterns in the Survey Area (Step 2)

6.11 The household telephone survey results identify shopping habits of households for both convenience and comparison goods, as well as commercial leisure spending. For convenience goods, the household telephone survey included questions on 'main food' and 'top-up food' shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% 'main' food / 30% 'top-up' food<sup>5</sup>). This forms a 'composite' pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

6.12 For comparison goods, the household telephone survey included questions on where respondents normally undertake shopping for the following types of comparison goods shopping:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

6.13 Shopping patterns for each of these types of comparison goods are then combined to produce a 'composite' set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type base on the proportion of personal spending ('expenditure per capita') available to residents in the survey area.

## Comparison goods shopping patterns

6.14 Shopping patterns derived from the household telephone survey allow us to calculate the amount of comparison goods expenditure spent in each centre within and surrounding the study area which forms the basis of our assessment. This indicator is a good reflection of both

<sup>4</sup> Experian Retail Planner 13, October 2015, Figure 5

<sup>5</sup> Based on our experience elsewhere, this represents a suitable split between 'main' and 'top up' food shopping.

the strength of the retail offer in a centre, as well as its accessibility, and overall quality of experience.

- 6.15 The total amount of expenditure which is retained within a study area is known as its 'retention rate'; the remaining expenditure which flows to destinations outside the study area is known as 'leakage'. **Table 6.1** shows the amount of comparison goods expenditure retained within the study area (including that retained within Sevenoaks District), and the amount of expenditure 'leakage'.

**Table 6.1: Comparison goods expenditure retention in Sevenoaks District**

	£m	% of total
Total amount of comparison goods spend available to study area (2016), of which:	1,543.5	100.0%
— Comparison goods trade draw to centres in Sevenoaks (Town centres, District Centres, out-of-centre and non-food floorspace in foodstores)	253.5	16.4%
— Comparison goods trade draw to other survey area centres (e.g. Orpington/Dartford)	334.3	21.7%
— Comparison goods trade draw to locations outside survey area (e.g. Bluewater, Royal Tunbridge Wells)	929.2	60.2%
— Comparison goods spending in local shops in survey area	26.5	1.7%

Source: Table 5, Appendix II

- 6.16 Our assessment has identified that there is a total of £1,543.5m of comparison goods expenditure which is available to residents of the study area. Of this, £253.5m is retained by centres and stores in Sevenoaks District, equivalent to a 'retention rate' of 16.4%. In the context of the competition for comparison goods spending which surrounds the District (which we discuss further below), we consider this to be a relatively good performance.
- 6.17 **Table 6.2** sets out the most popular destinations for comparison goods spending in the survey area, identifying the extent to which facilities outside the District compete for expenditure with the network of centres in Sevenoaks (building on the analysis previously set out at paragraph 4.2). The centres in Sevenoaks are shown in bold.

**Table 6.2: Study area comparison goods trade draw by centre**

Centre	LPA	Comparison goods trade draw (£m)	% of total comparison goods expenditure available to survey area
Bluewater	Dartford	362.5	23.5%
Royal Tunbridge Wells	Tunbridge Wells	141.1	9.1%
Orpington	Bromley	129.5	8.4%
<b>Sevenoaks town centre</b>	<b>Sevenoaks</b>	<b>122.3</b>	<b>7.9%</b>
Dartford	Dartford	85.4	5.5%
Tonbridge	Tonbridge and Malling	65.9	4.3%
Oxted	Tandridge	37.0	2.4%
<b>Swanley</b>	<b>Sevenoaks</b>	<b>23.1</b>	<b>1.1%</b>
West Malling/Kings Hill	Tonbridge and Malling	16.5	1.1%
<b>Edenbridge</b>	<b>Sevenoaks</b>	<b>15.7</b>	<b>1.0%</b>

Source: Table 5, Appendix II. All comparison goods destinations with turnovers in excess of £10.0m shown.

- 6.18 Table 6.2 shows that Bluewater is, by some margin, the most popular comparison goods shopping destination for residents in the survey area, drawing £362.5m of comparison goods expenditure, equivalent to 23.5% of total available comparison goods expenditure. Bluewater draws trade from across the survey area but its influence over shopping patterns in the western part of the survey area (Edenbridge, Oxted, and East Grinstead) is more limited.
- 6.19 Behind this, three centres — Royal Tunbridge Wells, Orpington and Sevenoaks town centre — draw similar amounts of comparison goods spend, of between £122.3m and £141.1m. Sevenoaks town centre's attractiveness as a comparison goods shopping destination has been enhanced in recent years through the opening of the Bligh's Meadow development, and in particular we expect the opening of the Marks & Spencer store to have had a positive impact on the overall comparison goods turnover of the town centre.
- 6.20 As suggested by the Sevenoaks District retail hierarchy in the Council's adopted Core Strategy, the remaining centres draw a far less significant market share than Sevenoaks town centre. After Sevenoaks town centre, the location in Sevenoaks District which draws the second-highest amount of comparison goods spend is Swanley (£23.1m), followed by Edenbridge



(£15.7m). The remaining centres in the District attract a comparison goods turnover of under £10m, confirming our 'health check' assessments that they have limited roles as comparison goods shopping destinations especially in some specialist sectors.

## Convenience goods shopping patterns

6.21 Convenience goods shopping is a more localised activity and people are generally less willing to travel significant distances to undertake this type of shopping. Our assessment has identified that there is £902.5m of convenience goods expenditure available to residents of the survey area; as set out previously, of this, £278.1m is spent at stores and centres in Sevenoaks District, which are located both in foodstores in Town/Service Centres (e.g. Waitrose stores in Sevenoaks and Edenbridge town centres, and Asda in Swanley) and standalone foodstores in out-of-centre locations (e.g. Sainsbury's at Otford Road, Sevenoaks or Tesco, Riverhead, Sevenoaks).

6.22 From our qualitative assessment, we consider that the District can generally be considered adequately provided for in terms of foodstores, because each of the Town/Service Centres contains at least one foodstore which, in many cases, acts as an important 'anchor' store to the wider offer of the centre. This is particularly the case in respect of the smaller centres such as Swanley and Edenbridge. The District's smaller Centres also in many cases have a convenience goods anchor – for example Co-op stores in Westerham, New Ash Green and Borough Green all play important roles in supporting the wider vitality and viability of these centres.

Sevenoaks urban area also has the largest number of edge and out-of-centre stores, most of which were constructed in the 1990s. The Sainsbury's, Otford Road Sevenoaks (3,814 sq.m) is the largest foodstore in the District, and is also the most popular destination for convenience shopping, drawing a convenience goods turnover of £64.0m from the survey area (Table 6.3).

**Table 6.3: Turnover of main foodstores in Sevenoaks District**

Foodstore	Total net floorspace (sq.m)	Turnover from survey area (£m)	Sequential location (in/ edge/ out-of-centre)
Sainsbury's, Otford Road, Sevenoaks	3,814	64.0	Out-of-centre
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	3,198	46.8	Out-of-centre
Asda, London Road, Swanley	5,460	49.9	In-centre

Waitrose, Mont St Aignan Way, Edenbridge	1,152	21.0	Out-of-centre
Waitrose, High Street, Sevenoaks	2,208	21.0	In-centre
Lidl, London Road, Sevenoaks	1,286	21.9	In-centre

Source: Table 7, Appendix III.

## Other inputs into the quantitative need assessment

### Sales Efficiency

6.24 It is also necessary to factor in changes in respect of 'sales efficiencies'. These represent the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail capacity studies. Although Experian (who are the data providers for the other technical inputs into this study) do not provide clear guidance on sales densities, it is fair to assume that as Experian anticipate that personal spending on both comparison and convenience goods will increase over the study period, so will sales efficiency. Informed by Experian's expenditure growth forecasts<sup>6</sup>, we have therefore adopted the following sales efficiency growth rates:

- **Comparison goods:** 1.75%, per annum (50% of average per capita expenditure growth on comparison goods between 2016 and 2035 of 3.5%);
- **Convenience goods:** 0.04%, per annum (50% of per capita expenditure growth on convenience goods between 2016 and 2035 rate of 0.08% per annum)

### Floorspace Data

6.25 The comparison and convenience goods floorspace data which we incorporate into our model has been drawn from a range of data sources, including the Institute of Grocery Distribution (IGD), Experian Goad, the Trevor Wood Retail Warehouse Database, and the Council's own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

<sup>6</sup> Experian Retail Planner 13, October 2015, Figure 1a

## Summary

- In this section we have set out the methodology behind the calculation of quantitative 'need' for new comparison (non-food) and convenience (food) goods, which we undertake in the following section. The need assessment is informed by an assessment of shopping patterns over the study area shown in Figure 6.1, which covers Sevenoaks District in its entirety, as well as parts of neighbouring authorities where Sevenoaks's catchment extends into.
- The total current population (at 2016) in the survey area is 406,923 persons. Based on population projections provided by data provider Experian, this will increase to 474,442 persons by 2035 (the end of the study period). This represents a growth in population of 67,519 persons.
- There is currently £1,543.5m of comparison goods expenditure available to residents of the survey area, which is expected to increase to £3,224.6m by the end of the study period (i.e. 2035), equivalent to a growth in comparison goods spending of £1,681.2m.
- Of the £1,543.5m comparison goods expenditure currently available to the study area, £253.5m (16.4%) is retained by centres and stores in Sevenoaks District. In light of the strength of the retail offer in surrounding centres (as discussed in the previous section), we consider this to represent a reasonably good performance. Of the £253.5m retained in the District, £200.3m is spent within Sevenoaks (including £122.3m in Sevenoaks town centre), £23.1m in Swanley, £15.7m in Edenbridge. Offord, New Ash Green and Westerham each achieve a comparison goods turnover of under £10m.
- There is currently £902.5m of convenience goods expenditure available to residents of the study area, which is expected to increase to £1036.3m by the end of the study period, equivalent to a growth in convenience goods spending of £133.8m.
- Of the £902.5m convenience goods expenditure currently available to the study area, £278.1m is retained by centres and stores in Sevenoaks District. It is apparent that the District is generally well-provided for in terms of foodstores, with each Town/Service centre containing at least one foodstore, which in many cases acts as the 'anchor' to the retail offer. There are also large out-of-centre foodstores in Sevenoaks, with a Tesco Superstore and Sainsbury's store located at Aisher Way and Offord Road Retail Park respectively. The most popular foodstore (in terms of turnover) is the Sainsbury's store at the Offord Road Retail Park, which has a convenience goods turnover of £64.0m.
- 'Special forms of trading' – which is mostly accounted for by online shopping – is expected to account for a maximum of 15.2% of total comparison goods spending and 6.4% of convenience goods spending over the course of the study period to 2035. The expenditure growth figures set out above take the most recent SFT forecasts (also provided by Experian) into account.

## 7. COMPARISON GOODS CAPACITY FORECASTS

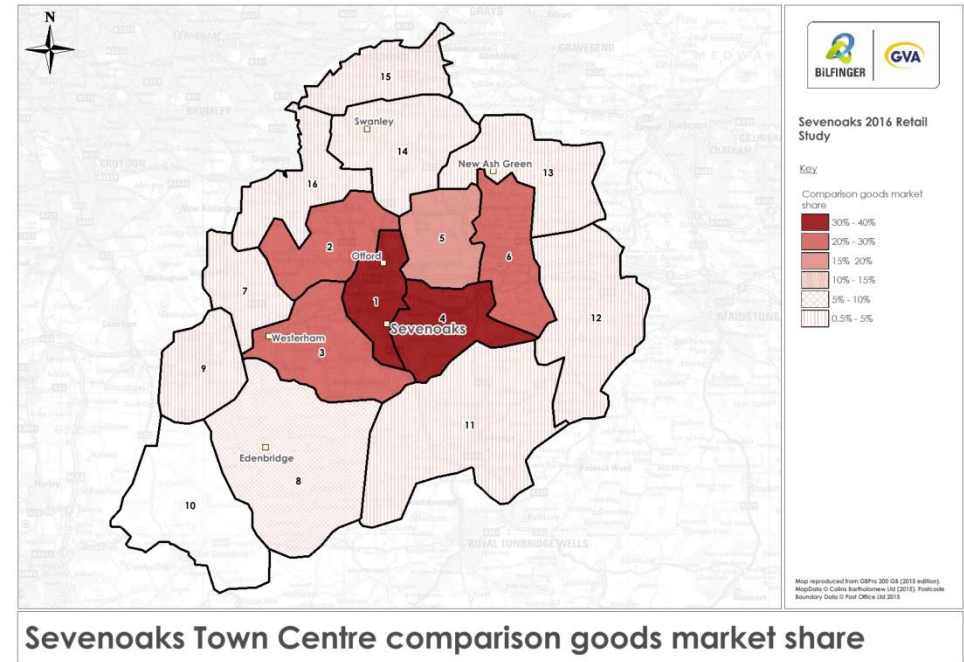
7.1 Having introduced the key inputs into our quantitative 'need' assessment in the previous section, here we progress to identify the quantitative comparison (non-food) capacity forecasts for Sevenoaks District – that is, the 'need' for new floorspace which we recommend the Council should plan for in its emerging Local Plan, based on the methodology which we have set out in Section 6. The convenience goods capacity forecasts follow in Section 8. The discussion in this section should be read in conjunction with the data tables in Appendix II of Volume 2 to the study.

### Sevenoaks (principal town centre)

7.2 As identified in the previous section, Sevenoaks town centre has, the highest comparison goods turnover of any of the centres in the District, drawing £122.3m of spend from the survey area, equivalent to 7.9% of the total comparison goods expenditure available to the survey area. Analysis of Table 4 (Appendix II) shows that Sevenoaks draws a comparison goods market share from fifteen of the sixteen survey zones (Figure 7.1).

Sevenoaks town centre draws a market share of 38.9% from its 'local' zone, zone 1, and we consider this to represent a reasonable performance, albeit one which the Council should aspire to improve over the course of its new Local Plan period. It also draws a market share of 34.2% from zone 4, and together these zones can be considered to form Sevenoaks town centre's 'primary catchment area'. Beyond this, as can be seen from Figure 7.1, there is a clear (almost) concentric ring of zones from which Sevenoaks town centre captures a more limited but nevertheless still significant market share — zones 2, 3, 5 and 6 — and these zones can be considered to form Sevenoaks town centre's secondary catchment area. Beyond this, the market shares drawn to Sevenoaks town centre become more limited, as the influence of competing centres over comparison goods shopping patterns become more pronounced.

Figure 7.1: Sevenoaks comparison goods market share by zone



Source: Table 4, Appendix II

7.4 Because the overall survey area and sub-division into survey zones is unchanged from that of the previous household telephone survey (which was undertaken in 2005), it is possible to undertake an analysis of how the market share of Sevenoaks town centre has changed over the past decade, during which time there has been enhancement of the retail offer in Sevenoaks town centre, including the opening of Bligh's Meadow a new Marks and Spencer store and an enlarged Waitrose store.

7.5 In **Table 7.1** we set out an analysis of the comparison goods market share of Sevenoaks town centre by zone, and how this has changed since the 2005 survey. Positively, Table 7.1 shows that Sevenoaks town centre has increased its market share from 14 of the 16 survey zones. Most notably, the town centre has increased its market share by 5.9% from its 'local' zone, zone 1, indicating that the town centre is doing a stronger job of retaining market share from immediate catchment area. A similar increase can be observed from zone 2, and a 7.2% increase from zone 4 can also be seen — as we have set out above zones 1 and 4 effectively

forms the primary catchment area for Sevenoaks town centre. The most notable change in shopping patterns has come from zone 6, where Sevenoaks town centre has managed to increase its market share by 13.4%. The change in market share from each of the zones which comprise the primary and secondary catchment area is also shown visually in **Figure 7.2**.

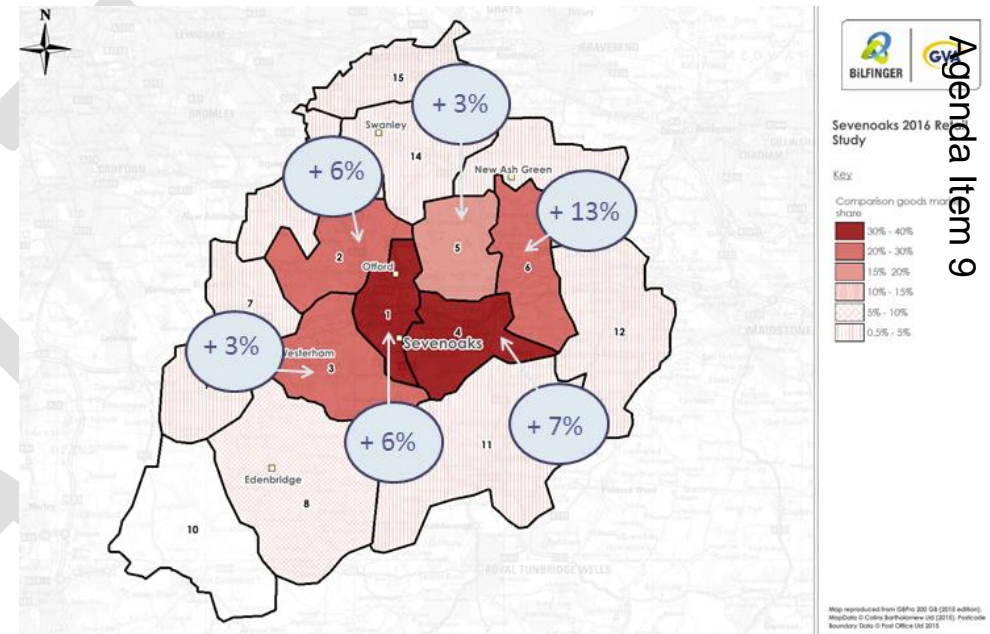
7.6 It can be seen from Table 7.1 that Zone 7 is the only location where the market share has decreased, with a decrease of 3.2%. Sevenoaks continues to have little influence over Zone 10, possibly due to the proximity of the zone to East Grinstead.

**Table 7.1: Sevenoaks town centre change in comparison goods market share, 2005-2016**

Survey Zone	Comparison goods market share (%) 2005	Comparison goods market share (%) 2016	Change in comparison goods market share (%) 2009 to 2017
Zone 1	33.0%	38.9%	+5.9%
Zone 2	16.0%	21.9%	+5.9%
Zone 3	22.0%	25.2%	+3.2%
Zone 4	27.0%	34.2%	+7.2%
Zone 5	15.0%	18.2%	+3.2%
Zone 6	7.0%	20.4%	+13.4%
Zone 7	7.0%	3.8%	-3.2%
Zone 8	1.0%	7.4%	+6.4%
Zone 9	0.0%	2.2%	+2.2%
Zone 10	0.0%	0.0%	0%
Zone 11	1.0%	4.5%	+3.5%
Zone 12	0.0%	2.1%	+2.1%
Zone 13	0.0%	1.0%	+1%
Zone 14	0.0%	2.2%	+2.2%
Zone 15	0.0%	1.2%	+1.2%
Zone 16	2.0%	2.4%	+0.4%

Source: Sevenoaks Retail Study 2009 / Table 4, Appendix II.

**Figure 7.2: Change in market share of Sevenoaks town centre for primary and secondary catchment area, 2005-2016**

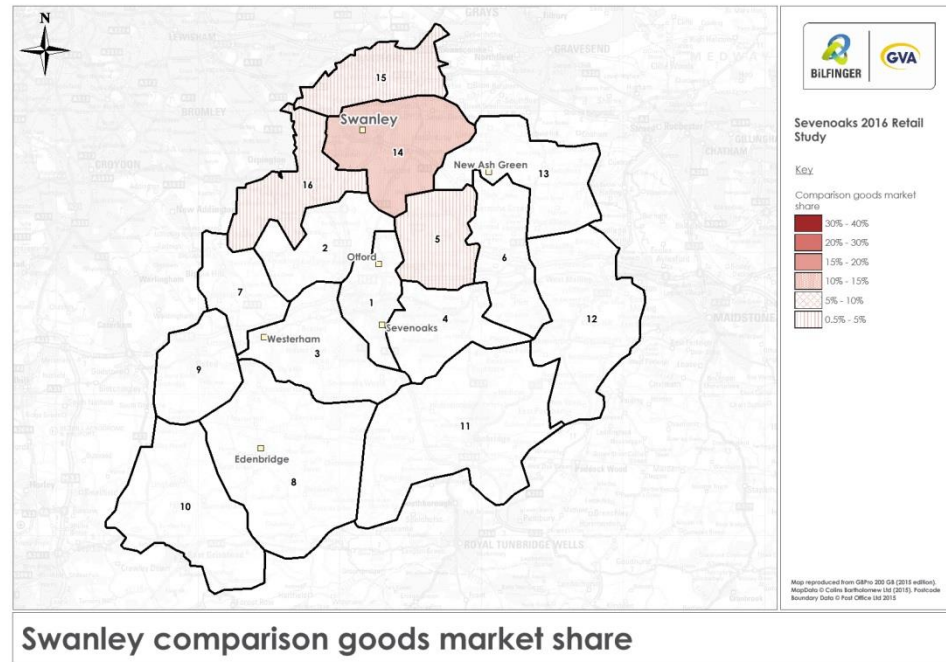




### Swanley (secondary town centre)

7.7 Swanley Secondary town centre draws £23.1m of comparison goods spend from the survey area, 2.1% of total available comparison goods spend. Its catchment area is much more localised than Sevenoaks (Figure 7.3), reflecting its more limited retail offer, and virtually all of its market share is drawn from its 'local' zone, zone 14, and the town centre attracts a comparison goods turnover of £13.2m from this zone. Residents in zone 14 also undertake their comparison goods shopping in Bluewater (which draws £52.3m of spending from zone 14), and Dartford (which draws £18.4m of spending from zone 14), and therefore these represent the key competing locations for this part of the district.

Figure 7.3: Swanley comparison goods market share by zone

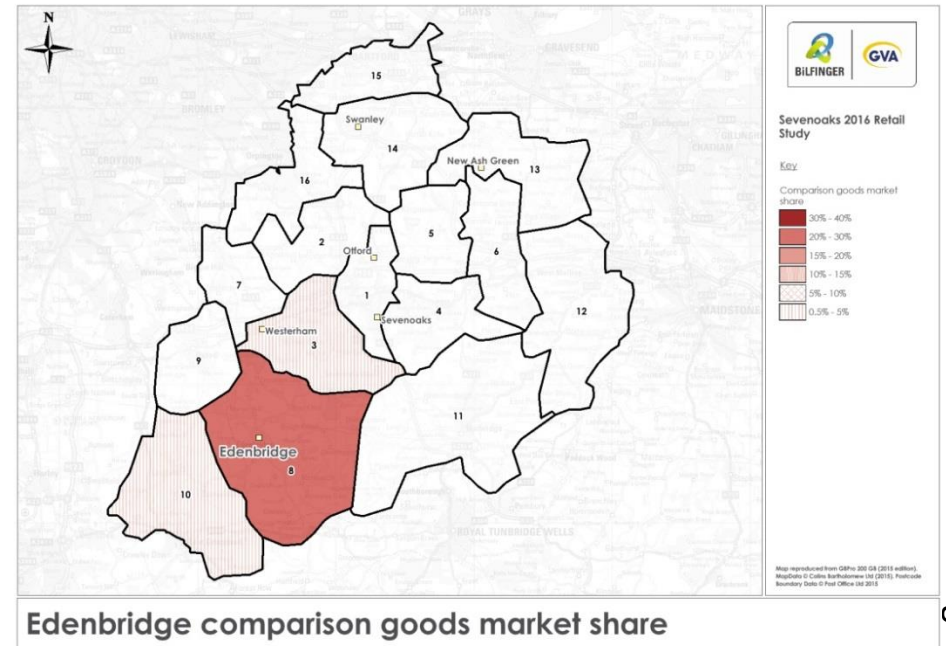


Source: Table 4, Appendix II

### Edenbridge (rural service centre)

7.8 Edenbridge, identified within the Sevenoaks Core Strategy (adopted 2011) as being a rural service centre draws £15.7m of comparison goods spend from the survey area. Again, its catchment area is localised rather than being a destination to which people travel a significant distance to: £14.0m of spend comes from its 'local' zone, zone 8, with £1.2m of spend also drawn from zone 10. Edenbridge principally competes with Royal Tunbridge Wells for comparison goods spending, which draws £20.3m of spend from residents in zone 8.

Figure 7.4: Edenbridge comparison goods market share by zone



Source: Table 4, Appendix II

## Other centres

7.9 As we have previously identified, the remaining Service Centres have a more limited role and function in respect of comparison goods shopping, and accordingly do not attract significant comparison goods turnovers from residents of the survey area; we summarise the performance of these below:

- **Oxford** draws a total of £8.3m of comparison goods spend from the survey area in full, of which £2.8m comes from its local zone (zone 1). Most residents in zone 1 undertake their comparison goods shopping in Sevenoaks, which draws £87m of spend from zone 1, and a further £22.8m is spent in Bluewater Shopping Centre;
- **Westerham** has a comparison goods turnover of £4.9m, reflecting the fact that the offer in this centre is more pitched towards convenience and retail services, in particular the restaurant/café sector. Of its £4.9m comparison goods turnover, £2.8m comes from zone 3 (its local zone) and a further £1.4m comes from zone 8. As noted above, most residents in zone 8 undertake their comparison goods shopping in Royal Tunbridge Wells, which claims £20.3m of the comparison goods spending from the zone or Edenbridge which claims £14m in zone 8.
- **New Ash Green** has the lowest comparison goods turnover of all the Centres, at £1.2m; it has a very limited range of comparison goods facilities which are mostly orientated towards day-to-day shopping needs. The majority of residents in zone 13, its local zone, look to Bluewater for comparison goods shopping.

## Out-of-centre floorspace

7.10 The only significant concentration of out-of-centre floorspace in the District is in Sevenoaks itself, with a concentration of retail warehousing in the Oxford Road area, to the north of the town centre. The retail parks in this location draw a total of £45.7m of comparison goods spending from the survey area, and the nearby Sainsbury's draws a further £16.7m of comparison goods spend. These are not insignificant levels of turnover — and whilst most of the retail warehousing offer in Sevenoaks is 'bulky goods' in nature, and therefore less likely to directly compete with the town centre — provision of open A1 retail could potentially pose more of a threat to the vitality and viability of the town centre.

## Comparison goods trading performance

7.11 By comparing the comparison goods turnovers of the key centres in the District with the amount of comparison goods floorspace they contain, we can obtain an indication of their

current trading performance, i.e. turnover per square metre. This exercise is useful in showing whether a centre is trading in line with expectations (taking account its role and function in the retail hierarchy), or whether it is 'under-trading' or 'over-trading'.

7.12 Table 8 of Appendix II shows that, on aggregate, comparison goods floorspace in Sevenoaks District is trading at £8,257 per sq.m. This is an aggregate trading performance, based on the turnover of the town and service centres and also the out-of-centre floorspace, such as Oxford Road, and comparison goods sales within large foodstores. **Table 7.2** sets out the trading performance of Sevenoaks town centre, plus Swanley and Edenbridge. We have not undertaken an equivalent assessment for the other centres in the District, as (1) there is no Experian Goad floorspace data available for these centres, and (2) their comparison goods turnover is, as set out above, relatively low and therefore the results would not, in any event, be a meaningful exercise.

**Table 7.2: Comparison goods trading performance of Sevenoaks, Swanley & Edenbridge**

	Comparison goods turnover from survey area (£m) <sup>1</sup>	Estimated comparison goods floorspace (sq.m) <sup>2</sup>	Turnover per sq.m (£)
Town centres			
Sevenoaks	122.3	10,682	11,450
Secondary Town centre			
Swanley	23.1	5,600	4,117
Rural Service Centre			
Edenbridge	15.7	2,583	6,085

<sup>1</sup>Source: Table 5a, Appendix II

<sup>2</sup>Source: Experian Goad category reports / EBC data

7.13 Table 7.1 shows that there are differences in the trading performance between Sevenoaks's centres. Sevenoaks town centre is performing particularly well, achieving a comparison goods sales density of £11,450 per sq.m — this is partly likely to be reflective of the type of comparison goods offer available in the centre, which is quite upmarket. In the context of the considerable competition offered by nearby locations such as Bluewater (which attracts a 16.9% market share from zone 1, Sevenoaks town centre's local zone) we consider this to be a strong trading performance.

7.14 By contrast, Swanley's comparison goods sales density of £4,117 per sq.m is low, and confirms the centre is currently underperforming as a comparison goods sales destination. The

comparison goods offer in the centre is currently quite limited, and restricted to 'value' retailers. An improvement in both the quality and range of the comparison goods offer in the centre should, in time, lead to an improved sales density.

- 7.15 The comparison goods sales density for Edenbridge is considered to be strong when considered against its role and function in the local retail hierarchy.
- 7.16 It should be noted that the figures shown in Table 7.2 do not take account of expenditure 'inflow' from beyond the study area, and if these figures were to be included, the performance of some of the centres would be higher.

### Identification of comparison goods capacity

- 7.17 Having undertaken the above assessment of trading performance, we are in a position to establish the quantum of new comparison goods floorspace which the Council should seek to plan for over the period to 2035. In assessing capacity for future comparison goods floorspace, we have assumed that existing comparison goods floorspace stock across the District will improve its sales efficiency (i.e. its turnover per sq.m) over the course of the study period. We have assumed that new comparison goods floorspace would achieve a sales density in the region of £6,500 per sq.m, which is considered to be a reasonable proxy for the trading performance of modern comparison goods floorspace in a robustly-trading location. Based on the performance assessment set out above, new comparison goods floorspace in Sevenoaks town centre could potentially trade at a higher level, dependent on the end operators in any new floorspace which comes forward.
- 7.18 In identifying capacity it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. We also advise that findings should be considered alongside the qualitative discussion of the performance of individual centres which this report has previously set out, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace. This is particularly applicable to centres such as Swanley, where the Council's regeneration aspirations are likely to mean there is a qualitative need for additional provision compared to what would be required under a 'baseline' scenario.
- 7.19 The 'baseline' comparison goods capacity for Sevenoaks District over the period to 2035 is shown in **Table 7.3**. These capacity forecasts are based on 'constant market shares', i.e. assuming that current patterns of comparison goods shopping (as identified in the household telephone survey) will remain unchanged. The capacity forecasts do not include any planning commitments, as none are known to be coming forwards at the time of writing.

**Table 7.3: Comparison goods floorspace capacity, Sevenoaks District**

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
District-wide comparison goods floorspace capacity	3,900	9,100	15,300	21,700

Source: Table 8a, Appendix II

\*Indicative only. Figures are cumulative.

- 7.20 Table 7.3 shows that, assuming current patterns of comparison goods shopping remain unchanged (i.e. a 'constant market share' approach), there is a need for the Council to plan for an additional 3,900 sq.m net additional comparison goods floorspace in the short-term period to 2020. This requirement then increases to 9,100 sq.m net additional comparison goods floorspace by 2025, 15,300 sq.m net by 2030 and 21,700 sq.m net by 2035. As stated above, figures at the end of the Plan period should be considered indicative.
- 7.21 **Table 7.4** also shows the capacity for each of the principal centres in the District, again based on a 'constant market shares' approach. The household survey results and our own analysis has shown that Sevenoaks town centre is performing well as a comparison goods shopping destination at present, and has increased its market share from much of its primary and secondary catchment area relative to the previous household survey (undertaken in 2005). The strong performance of Sevenoaks town centre, coupled with the trading of the out-of-centre retail warehouse facilities in the town does, in turn, generate a 'need' for new floorspace, and accordingly the majority of the District-wide requirement of 9,100 sq.m net by 2025 / 21,700 sq.m net by 2035 arises in the Sevenoaks urban area. Table 7.3 shows that, as part of the District-wide requirement, there is a quantitative 'need' for 7,200 sq.m net by 2025 / 17,100 sq.m net by 2035 to be accommodated in the Sevenoaks urban area. In line with national and local policy requirements, this 'need' should be directed towards Sevenoaks town centre.
- 7.22 Because the remaining centres in the District currently have a more limited role and function as comparison goods shopping destinations, the quantitative 'need' for new floorspace generated in these locations is more limited. Based on current shopping patterns there is a quantitative 'need' for just 800 sq.m net additional comparison goods floorspace in Swanley by 2025, increasing to 2,000 sq.m net by 2035. However, there is a strong qualitative case for Swanley town centre to accommodate a greater amount of comparison goods floorspace than this, in order to assist in the Council's aspirations for the regeneration of the centre. We return to discuss this further in Section 9.

7.23 The quantitative 'need' for comparison goods floorspace in Edenbridge is 600 sq.m net by 2025 /1,400 sq.m net by 2035. There is a combined 'need' for additional 500 sq.m net additional comparison goods floorspace by 2025 across the three Local Service Centres of Offord, Westerham and New Ash Green, increasing to 1,200 sq.m net by 2035.

**Table 7.4: Comparison goods floorspace capacity by centre, Sevenoaks District**

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
Sevenoaks town	5,200	5,700	6,200	6,500
Swanley	400	800	1,400	2,000
Edenbridge	300	600	1,000	1,400
Offord/Westerham/New Ash Green	200	500	900	1,200

Source: Table 8b-8e, Appendix II

\*Indicative only. Figures are cumulative.

In all cases we repeat our advice that capacity forecasts, particularly those beyond 2025, should be subject to regular review throughout the Council's new Local Plan period.

## Summary

- In this section we have discussed the comparison goods shopping patterns highlighted in the previous section in further detail, defining the catchment area for each of the Town and Service centres in the District. We also identify the amount of comparison goods floorspace which the Council should plan for over the course of the period to 2035.
- The results of the household survey show that Sevenoaks town centre has a clearly defined 'primary' and 'secondary' catchment area, and that its attractiveness as a comparison goods shopping destination from across the survey area has, for the most part, increased when compared to the previous survey of shopping patterns which was undertaken in 2005. The catchment of Swanley and the smaller centres in the District is, as would be expected, considerably more limited.
- We have also analysed the comparison goods trading performance of each of the Town and Service Centres in the District. This has identified that comparison goods floorspace in

Sevenoaks town centre is trading particularly strongly, but provision in Swanley is currently underperforming.

- Based on a constant market share approach (i.e. assuming that current patterns of comparison goods shopping remain unchanged), the Council should plan for up to 9,100 sq.m net additional comparison goods floorspace by 2025, increasing to up to 21,700 sq.m net additional comparison goods floorspace by 2035.
- The majority of this qualitative floorspace 'need' arises in the Sevenoaks urban area on account of the strong trading performance of comparison goods floorspace in the town, but there may be a qualitative case for an element of this need to be developed in Swanley town centre in order to assist with the regeneration of the centre.
- Longer term forecasts should be considered indicative and subject to regular review.



## 8. CONVENIENCE GOODS CAPACITY FORECASTS

8.1 In this section we set out the capacity for additional convenience (food) floorspace in Sevenoaks District over the period to 2035. Our discussion follows the same format as set out for the comparison goods capacity forecasts in the previous section. The discussion set out below should be read in conjunction with the tabulations at Appendix III.

### Shopping patterns by centre

8.2 **Table 8.1** shows the most popular convenience goods shopping destinations for those parts of the survey area that fall within Sevenoaks District — zones 1 (Sevenoaks), 2 (Otford), 3 (Westerham), 8 (Edenbridge), 13 (New Ash Green) and 14 (Swanley). It also shows each zone's 'local retention rate', i.e. the proportion of available convenience goods expenditure to residents of that zone which is retained within the zone itself, thus giving an indication of the sustainability of localised convenience goods shopping patterns. The green-shaded entries denote stores within the respective 'local' zones; the purple-shaded zones denote stores within an adjacent survey zone.

**Table 8.1: Local retention rate and most popular convenience goods shopping locations by zone**

	Local retention rate (for zone) (%)	Most popular convenience goods shopping location (%)	Second-most popular convenience shopping location (%)	Third-most popular convenience shopping location (%)
Sevenoaks (zone 1)	88.2%	Sainsbury's Otford Road, Sevenoaks (29.2%)	Tesco Superstore, Aisher Way, Sevenoaks (25.4%)	Waitrose, High Street, Sevenoaks (13.2%)
Swanley (zone 14)	56.4%	Asda, London Road, Swanley (44.7%)	Aldi, St Mary's Road, Swanley (10.8%)	Dartford foodstores (8.0%)

	Local retention rate (for zone) (%)	Most popular convenience goods shopping location (%)	Second-most popular convenience shopping location (%)	Third-most popular convenience shopping location (%)
Edenbridge (Zone 8)	60.1%	Waitrose, Mont Aignon Way, Edenbridge (52.5%)	Oxted foodstores (11.6%)	Tesco Express, 39-41 High Street, Edenbridge (7.6%)
Westerham (Zone 3)	15.1%	Tesco Superstore, Aisher Way, Sevenoaks (25.3%)	Oxted foodstores (13.3%)	Co-Op, The Grange, High Street, Westerham (9.3%)
Otford (Zone 2)	0%	Tesco Superstore, Aisher Way, Sevenoaks (34.8%)	Sainsburys, Otford Road, Sevenoaks (18.7%)	Orpington foodstores (12.6%)
New Ash Green (Zone 13)	9%	Gravesend foodstores (48.6%)	Longfield foodstores (20.7%)	Co-Op, The Row, New Ash Green (8.6%)

Source: Table 4, Appendix III

8.3 Table 8.1 shows that there is variation in the 'local retention rate' across the District — this is to be expected; the larger centres (e.g. Sevenoaks) have a greater number of foodstores of different sizes and operators, and accordingly fewer residents need to travel further afield to undertake their convenience goods shopping. By contrast, smaller centres such as New Ash Green have much more limited provision, and the stores are much smaller and generally catered towards meeting top-up shopping needs. It therefore makes sense that residents of these settlements look towards their nearest larger town (such as Oxted, in the case of Westerham, or Gravesend, in the case of New Ash Green) rather than to shop within the District, in Sevenoaks for example. However, with the exception of New Ash Green (zone 13), Table 8.1 shows that many residents' convenience goods shopping needs are currently being met at the local level.

### Performance assessment

8.4 In Tables 6 and 8 of Appendix III, we have undertaken a review of the trading performance of the convenience goods floorspace in the District, to establish whether the floorspace is trading

in line with 'benchmark' levels (i.e. company averages for national operators, or typical sales densities for independent retailers). Table 8 of Appendix III shows that, on average, convenience goods floorspace in Sevenoaks urban area is trading (i.e town centre and out-of-centre convenience goods floorspace combined) at £16,477 per sq.m, which is a high sales density and suggests that most convenience goods floorspace in the District is trading particularly well.

8.5 Analysis of the performance of individual stores in the District is set out at Table 6 of Appendix III. This shows that the performance of foodstores in the District is quite mixed. The foodstores within Sevenoaks town centre appear to be performing relatively poorly when compared with out of centre stores in the Sevenoaks area. The Waitrose, High Street, store is showing as 'under-trading' by -£3.7m against company average levels, and the Tesco Metro store on High Street by -£8.9m. This is partly likely to be reflective of the fact that both stores may cater more towards the top up shopping market and therefore have a lower response rate in the household survey if they act as 'pop in' shops where people just pick up one or two items. The stores could, accordingly, be being under-reported slightly. However, it is also possible that the stores have been impacted by the opening of the foodhall within the new Marks & Spencer store at Bligh's Meadow, particularly as this store benefits from directly adjacent surface car parking.

Qualitatively, our site visits to the Waitrose store have suggested that this store appears busy and is trading well. The Tesco Metro appeared less busy, and is possibly too big a store for the 'Metro' format the company is trading from — the fact that a significant proportion of the floorspace is given over to the company's clothing brand is an indication of this; typically these are only located in the company's large out-of-town stores.

8.7 The out of centre stores within the Sevenoaks urban area appear to be performing well. Sainsbury's, Otford Road is, as we have set out in Section 6, the most popular foodstore for residents in the survey area, and our assessment shows that this store is currently 'over-trading' by +£30.8m when compared to company average levels. The large Tesco store at Riverhead is also performing well, at +£19.0m above company average levels, and the Lidl store at London Road is also performing particularly well and is currently over-trading by +£18.4m.

8.8 Elsewhere in Sevenoaks District, foodstores are generally performing well, albeit not performing as significantly above the company averages as the out-of-centre stores in Sevenoaks:

- The Asda store in Swanley is performing +£1.6m above the company average, and the Aldi in Swanley is trading strongly, at +£5.4m above company average levels;
- The Waitrose store in Edenbridge is performing well, following its conversion from a Co-op store, and the store is currently trading at +£6.7m above company average levels;

- In Westerham, the Co-Op is performing at around the company's average level (+£0.7m against company benchmark levels);
- In New Ash Green, despite the overall relatively poor performance of the centre, the Co-Op appears to be performing well, and is currently trading at +£3.2m above the company average.

### Identification of convenience goods capacity

8.9 **Table 8.2** shows the capacity for additional convenience goods floorspace in Sevenoaks district over the period to 2035. As with the comparison goods capacity forecasts which we have set in Section 7, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly should be refreshed throughout the Council's Plan period. Findings should be considered alongside our qualitative assessments set out earlier in this report, as identification of low/negligible capacity does not, in itself, mean that there is no 'need' for additional floorspace.

8.10 Based on a 'constant market share' approach (i.e. assuming that current patterns of shopping remain unchanged), **Table 8.2** shows that there is a quantitative 'need' for 9,000 sq.m net additional convenience goods floorspace in the District over the period to 2025, increasing to 10,300 sq.m net by 2035. The forecasts do not take into account any 'commitments', as none are known at the time of writing.

**Table 8.2: Convenience goods floorspace capacity, Sevenoaks District**

	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
District-wide convenience goods floorspace capacity	8,300	9,000	9,800	10,300

Source: Table 8e, Appendix III

\*Indicative only. Figures are cumulative and rounded.

8.11 In Table 8a-8d of Appendix III we have sub-divided the requirements between each of the principle locations in the District, in order to provide guidance as to where new foodstore development should potentially come forward. Because it is the focus of the population growth in the District, and coupled with the fact that the majority of its existing convenience goods floorspace is trading particularly strongly, the majority of the identified 'need' arises in

the Sevenoaks urban area, with lower levels of need arising in Swanley, Edenbridge and the rest of the District. A summary of this is provided in **Table 8.3**.

- 8.12 However, as set out in the previous section, it does not automatically follow that existing patterns of shopping should reflect future distribution of floorspace, and therefore the forecasts set out below should be considered in conjunction with the qualitative recommendations set out elsewhere in this report. In particular, there may be scope for additional foodstore provision in Swanley over and above the 1,600 sq.m net figure set out in Table 8.3, in order to support the regeneration of the centre. Similarly, whilst there is a quantitative 'need' for additional provision in Edenbridge (largely arising on account of the strong trading performance of the Waitrose store), there may not be scope for this to be accommodated on an in-centre or suitable edge-of-centre site due to the relatively constrained nature of the centre.

**Table 8.3: Convenience goods floorspace capacity by centre, Sevenoaks District**

Convenience goods floorspace capacity	2020 (sq.m net, rounded)	2025 (sq.m net, rounded)	2030 (sq.m net, rounded)*	2035 (sq.m net, rounded)*
Sevenoaks urban area	5,300	5,700	6,200	6,500
Swanley	1,100	1,300	1,400	1,600
Edenbridge	800	900	1,000	1,000
Local Service Centres	1,100	1,200	1,200	1,300

Source: Table 8a-Table 8d, Appendix III

\*Indicative only. Figures are cumulative and rounded.

## Summary

- In this section we have reviewed the convenience goods shopping patterns of residents in the study area in greater detail, showing the most popular convenience goods facilities in each of the study zones which fall within Sevenoaks District, reviewing the trading performance of convenience goods floorspace, and identifying the amount of convenience goods floorspace which the Council should plan for over the period to 2035.

- There are no qualitative gaps in convenience goods provision in the Town and Service Centres. Each of the District's Town and Service centres has at least one foodstore which, in many cases, anchors the wider retail and leisure offer.
- In some cases, a foodstore exerts a particularly strong influence over local market shares. This is particularly the case in the Sevenoaks town area, where the household telephone survey has identified that the Sainsbury's and Tesco Superstore each attract a market share of over 25% from their respective 'local' survey zones.
- The majority of the out of centre foodstores in the District are trading strongly, and a number have turnovers significantly in excess of operator 'benchmark' levels. Town centre foodstores within Sevenoaks town centre appear to be trading at below average levels, but this is partly likely to be related to the fact they perform a greater role and function as 'top up' shopping locations.
- Assuming a 'constant market share' approach (i.e. that current patterns of convenience goods shopping will remain unchanged), the Council needs to plan for up to 9,000 sq.m net convenience goods floorspace by 2025 rising to (indicatively) 10,300 sq.m net convenience goods floorspace by 2035. The majority of this 'need' arises in the Sevenoaks area, on account of the strong trading performance of many of the foodstores in this area at present.
- As with the comparison goods forecasts identified in the previous section, these figures should be kept under review.

## 9. CONCLUSIONS & STRATEGIC RECOMMENDATIONS

- 9.1 In this report we have provided an update assessment of the retail needs of Sevenoaks District, over the course of the period of the Council's new Local Plan, to 2035. The study will form an important part of the evidence base for the Council's new Local Plan, and will also be used by the Council to assist in the determination of planning applications for new town centre development in the District. The findings of this study update the District's previous retail capacity evidence base study, from 2009.
- 9.2 The findings set out in this study have been underpinned by a new household telephone survey of shopping patterns, superseding the previous equivalent survey which dates back to 2005. In order to ensure continuity with the previous studies, the boundaries of the 'survey area', and the subdivision of this survey area into zones (which allows for a more localised analysis of shopping patterns to be undertaken), are all unchanged. The 'survey area' we have used for the purposes of our assessment covers all of Sevenoaks District, and extends into parts of neighbouring authority areas which may look towards centres in the District for their shopping and services.
- 9.3 This study has been prepared at a time of considerable change for the retail and leisure sector in the UK — whilst there has been a shift back in focus towards town centres in recent years, there is increasing a need for centres to act as 'destinations' rather than being focus for retail activity. Therefore, whilst the principle focus of this study has been to update the estimates of new retail floorspace which the Council needs to plan for, the delivery of this should form part of a wider strategy to enhance and diversify the range of 'town centre' uses within the District's network of centres, in order to support their long term vitality and viability over the course of the Council's new Local Plan period.

### National and Local Planning Policy Framework

- 9.4 The National Planning Policy Framework (NPPF) was adopted in March 2012 and replaces the suite of national planning policy statements, including PPS4. The NPPF maintains the general thrust of PPS4 and advocates a 'town centres first' approach. It requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. It also requires local planning authorities to define the extent of the town centres and primary shopping areas, based on a clear definition of primary and secondary frontages.

- 9.5 The Sevenoaks District Core Strategy was adopted in February 2011, a year before the adoption of the National Planning Policy Framework in March 2012. Paragraph 4.1.6 of the Core Strategy sets out the hierarchy of centres, identifying Sevenoaks as the 'principal town' and Swanley as the 'secondary town centre'. Below this, Edenbridge is classified as a 'Rural Service Centre' and the centres of Otford, Westerham and New Ash Green as Local Service Centres. It is these six centres which have formed the basis of our study.
- 9.6 Policy LO3 of the Core Strategy states that new development should be of an appropriate scales and consistent with the existing character of the centre and improving town centre quality. Policy LO3 goes on to state that the town centre can accommodate approximately 4,000 sq.m of new shopping floorspace (based on a split of 1,700 sq.m convenience floorspace and 2,300 sq.m comparison) — we update these capacity forecasts as part of this study. Policy LO4 supports the regeneration and redevelopment of Swanley town centre, and we expect that this will continue to remain an important policy focus in the Council's new Local Plan (discussed below).
- 9.7 The Council is currently in the process of developing a new Local Plan (2015-2035). It is anticipated that the 'Issues and Options' draft will undergo consultation in Spring/Summer 2017. The development of this new Local Plan requires a new supporting evidence base, which this study forms part of.

### National retail and leisure market trends

- 9.8 Our study has set out that the 'traditional' high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping, including multi-channel retailing, acts as tough competition for the high street, but also presents an opportunity for the high street to capitalise, by maximising the opportunities arising from services like 'Click & Collect', and retailers moving towards a seamless transition between store-based and virtual shopping experiences. A number of retailers in Sevenoaks town centre, for example, now offer 'Click & Collect' facilities, including Boots, Waitrose (which can also be used as a Click & Collect for John Lewis orders), Marks & Spencer and Tesco — however it has yet to extend to many retailers in either centre (particularly the independent sector), and indeed this represents an opportunity for all of the District's centres moving forward.
- 9.9 The convenience goods sector is in the middle of a considerable period of change. The main foodstores (i.e. the 'big four' - Sainsbury's, Tesco, Asda, Morrisons) have reigned in substantial expansion and the roll-out of super-sized stores, evidenced by the recent withdrawal of Sainsbury's from developing a new foodstore (which benefitted from planning consent) in

Edenbridge for example. The combined spread of convenience store openings, online grocery sales, and the expansion of 'deep discount' retailers such as Aldi and Lidl has fundamentally changed consumer shopping behaviour. These trends have encouraged repetitive top-up shopping that in turn diminishes main grocery sales and renders large-format stores less profitable. However, it is important to note that these large-format stores continue to account for the majority of convenience goods shopping trips, and the evidence from this study suggests that the majority of larger-format stores in the District are continuing to perform well.

- 9.10 Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to 'high street' retailers. Many out-of-centre developments are seeking to increase footfall through a greater product offer and mix of uses (including introduction of coffee shops and casual dining) to encourage footfall and longer dwell times.
- 9.11 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience. Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations.
- 9.12 Sevenoaks town centre benefits from a particularly strong café and restaurant sector, and therefore is well placed to respond to these changes in consumer behaviour, although there are qualitative gaps in its leisure offer, in particular the absence of a multi-screen cinema. Whilst the growth of the café and restaurant sector is important to the future vitality and viability of centres, it should not come at the expense of the centres' core shopping functions.
- 9.13 Town centre strategies which support the continued evolution of the high street are now vital. This should involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. Indeed, within Sevenoaks and Westerham, there is potential to build upon links with local tourist attractions.
- 9.14 It will be important for town centres to continue to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the new Local Plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres, allowing them to differentiate themselves from – rather than directly compete with – higher order centres. This is particularly important for Sevenoaks District's town centres, which do not have any centres with the scale of retail and leisure offer to compete with nearby higher order

centres (particularly Bluewater), but do have heritage and tourism assets and other 'unique selling points' which can be capitalised on which some competing centres are not able to offer. Robust place-marketing strategies put in place to further support and develop the centres as visitor destinations.

## The sub regional network

- 9.15 Sevenoaks District is surrounded by a number of larger centres — Bluewater Shopping Centre, Royal Tunbridge Wells, Orpington and Bromley — which exert an influence over shopping patterns and commercial leisure visits of residents in the District to varying degrees. There is no reason to assume that the 'higher order' centres which surround the County will lessen their influence over the comparison goods shopping patterns of residents in the District over the Council's Local Plan period, and it is for this reason our capacity forecasts (discussed below) are based on a 'constant market share' approach, i.e. we have not planned for the overall proportion of comparison goods expenditure which is retained in the catchment area to increase.
- 9.16 The most popular comparison goods shopping destination for residents in the survey area is Bluewater, which accounts for almost one-quarter of comparison goods spend available to the survey area. Bluewater is within the top 30 shopping destinations in the UK and is the 2<sup>nd</sup> highest ranked shopping mall in Venuescore's 2014-2015 rankings. Bluewater is performing well both as a location for comparison goods shopping and recreational/cultural activities. Bluewater has become a 'destination' location, as its offer has evolved beyond retail to include a Showcase Cinema, Spa and Beauty offer (this includes Beauty Salons, in store spas and Hair Salons), Pirate Cove Adventure Park and a number of clubs and classes (e.g. sewing at John Lewis). We therefore expect the influence of Bluewater to continue throughout the Plan period.
- 9.17 However, our comments have shown that the centres in Sevenoaks District are performing generally well (albeit each main centre has areas where improvements would be beneficial). In the remainder of this section we set out a series of strategic recommendations. These are designed to ensure that the vitality and viability of the District's network of centres is maintained and enhanced throughout the local plan period. Implementation of these recommendations will ensure the centres are in a robust position as possible to withstand the competition for spending presented by the key surrounding centres and assist in delivering vibrant town centres which meet the shopping and leisure needs of their respective catchments.



## District-wide recommendations

- **SD1** — The Council should ensure that the core retail functions of the town and neighbourhood centres are protected and, where possible, enhanced. Active uses on ground floor frontages should be encouraged throughout primary and secondary locations, ensuring that contiguous frontages are provided, and avoiding changes of use which break up the run of facades.
- **SD2** — The Council should plan for the below District-wide new comparison and convenience goods floorspace over the period to 2035:

	Floorspace requirement, 2025 (sq.m net)	Floorspace requirement, 2035 (indicative) (sq.m net)
Comparison goods	9,100	21,700
Convenience goods	9,000	10,300

- **SD3** — The above floorspace figures should be reviewed at regular intervals throughout the Council's new Local Plan period, particularly once an agreed strategy for the distribution of new housing growth across the District (which will be set out in the Council's new Local Plan) is agreed.
- **SD4** — It is recommended that figures in the latter half of the Plan period (i.e. beyond 2025) are considered indicative and should be subject to review and updating throughout the Plan period. This is because key inputs into the quantitative 'need' assessment (such as population, expenditure growth, and 'special forms of trading' such as online shopping) will invariably alter because of strategic changes and economic fluctuations. In parallel, patterns of shopping and leisure visits will also continue to involve as new development comes forward in competing centres.
- **SD5** — The Council will need to ensure that there is a sufficient supply of sites to meet the full extent of quantitative 'need' outlined in Recommendation SD2. The 'need' for new floorspace should not be compromised by limited site availability.
- **SD6** — Floorspace should not be allocated to out-of-centre locations, in order to protect the vitality and viability of the network of centres in the District.
- **SD7** — The identification of sites to meet retail (and other 'main town centre uses', as defined by the NPPF) should be subject to the sequential test, and should, in accordance with the approach set out in the NPPF and Core Strategy, be directed towards existing defined town and service centres in the first instance, followed by appropriate and well-connected edge-of-centre sites.

- **SD8** — In order to protect the network of town and service centres, it is recommended that a District-wide impact assessment threshold of 500 sq.m (net) should be adopted. This will help protect the network of town and service centres from inappropriate edge-of-centre and out-of-centre developments, ensuring that the local planning authority retains the greatest level of control in the decision-making process.
- **SD9** — Our performance assessment has demonstrated that the existing network of town centres, service centres and service villages are performing a role which is consistent with their role and function in the retail hierarchy. The exception to this is Swanley, which is currently underperforming and has a retail offer more akin to that of a district centre. However, in light of the planned investment and regeneration which is expected to come forward, we consider that on balance its current classification should remain. Should this redevelopment not transpire, it is recommended that the Council reconsider classification of Swanley as a district centre.

Centre hierarchy	Centre(s)
Principal Town	Sevenoaks
Secondary Town	Swanley* (*subject to review during Local Plan period)
Rural Service Centre	Edenbridge
Local Service Centres	Westerham, New Ash Green and Otford
Service Villages	Brasted, Crockenhill, Eynsford, Farningham, Halstead, Hartley, Hextable, Horton Kirby, Kemsing, Knockholt Pound, Leigh, Seal, Sevenoaks Weald, Shoreham, South Darenth, Sundringe and West Kingsdown.

- **SD10** — The Council should continue to support its network of Service Villages as locations for meeting basic day-to-day shopping needs. Applications which seek to improve provision of day-to-day facilities (both in terms of retail, and other key facilities set out at Appendix I to this study) should be supported in principle providing they are of an appropriate scale and would not undermine the centre's position in the District's retail hierarchy.
- **SD11** — The role of farm shops should continue to be supported as they make an important contribution to the rural economy. Applications for enhancements/improvements of facilities should be supported in principle, providing they are of an appropriate scale and would not undermine the existing hierarchy of centres in the District. Applications for extensions of farm shops which seek to provide new floorspace should demonstrate compliance with the sequential test, and, if proposing over 500 sq.m net of new retail/town centre uses floorspace (see **SD8**), also demonstrate compliance with the impact test.

## Permitted Development

9.18 In considering the above recommendations for supporting the vitality and viability of the network of centres in the District we draw attention to the fact that the Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. Of particular relevance, the amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use. The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities which restrict the amount of non-A1 units in a retail centre or frontage.

- **SD12** — The Council's policy framework has effectively protected and enhanced the primary shopping area in recent years, and we recommend the proactive consideration of legislative controls to prevent such a change of use where considered inappropriate and harmful to the vitality and viability of the shopping frontage – i.e. the dilution of A1 uses underpinning footfall and connectivity across a centre. This recommendation is applicable to centres at all levels of the retail hierarchy in the District. Consideration should be given to the use of Article 4 directions to assist in the protection of primary shopping frontages.

## Sevenoaks town centre recommendations

Having set out the general District-wide recommendations, below we set out a summary of the performance of Sevenoaks town centre and provide recommendations to take forward in the Council's new Local Plan. Our health check analysis of Sevenoaks town centre has confirmed that the centre continues for the most part to be performing well against key vitality and viability indicators. The centre has, a good retail mix, although there are qualitative gaps in the retail offer which do mean that the centre is possibly not as well-placed to compete with surrounding centres as it could be.

9.20 The results of the pedestrian on-street surveys undertaken in support of this study confirm that users of the centre visit for a variety of reasons, including both food and non-food shopping, as well as employment and other uses, whilst the results of the household telephone survey have indicated that Sevenoaks town centre has increased its market share from 14 of the 16 household survey zones since the previous survey of shopping patterns was undertaken in 2005, and its comparison goods sales density (turnover per sq.m) is £11,450 per sq.m. All these factors together indicate that Sevenoaks town centre benefits from a good level of vitality and viability.

9.21 There remain opportunities to improve the centre in order to secure its longer term vitality and viability, including the positive re-use of under-used peripheral areas, and the provision of a broader range of sizes of retail units, but for the most part Sevenoaks appears well placed to remain a healthy town centre. Continued loss of comparison goods expenditure to Bluewater will be inevitable — but if Sevenoaks town centre can continue to develop its own identity and more specialist offer, then the two locations should be able to mutually co-exist as comparison goods shopping destinations.

9.22 Continued promotion of the town's markets, heritage assets (including enhancement of linkages to the National Trust's Knole House and a strategy of joint promotion) and independent retail and food & beverage sector are likely to be particularly important in this respect, and will enable Sevenoaks town centre to remain resilient both to the trends in the wider retail sector discussed in Section 3, and also from the potential further threats to its market share which could arise from expansion of Bluewater, and/or enhancement of the retail offer in other surrounding centres.

- **STC1** — Continue to support and facilitate appropriate growth on sites in Sevenoaks town centre to support and enhance its function as the Principle Town centre in the District, and further develop and enhance the attractiveness of the retail and commercial leisure offer in the centre.
- **STC2** — The core function of Sevenoaks town centre as a comparison goods shopping destination should be protected and enhanced. This should be achieved through the development and implementation of robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — is retained. Such an approach will also ensure that Sevenoaks town centre is as best placed as possible to withstand the potential increased attractiveness from competing shopping destinations.
- **STC3** — Sevenoaks town centre should, along with Swanley, be the focus of the identified District-wide comparison goods capacity requirements of 9,100 sq.m net floorspace by 2025 / 21,700 sq.m net by 2035. Based on current performance, Sevenoaks town centre should support up to 7,200 sq.m net additional comparison goods floorspace by 2025 / 17,100 sq.m net by 2035.
- **STC4** — In the event that the above comparison goods floorspace requirements cannot fully be accommodated in Sevenoaks town centre, the balance should be directed towards Swanley town centre to support the Council's regeneration aspirations and the need to improve and enhance the retail floorspace in the centre.
- **STC5** — The Council should consider favourably proposals which seek to provide new comparison goods floorspace in Sevenoaks town centre. This could include modernisation

/ amalgamation of existing units within the primary shopping frontage to provide larger-format units which may be more attractive to higher-profile operators.

- **STC6** — Sub-division of existing retail units within the primary shopping frontage should be resisted.
- **STC7** — Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversity the offer/mix in the centre.
- **STC8** — Whilst it is recognised that there is some cinema provision in the form of the Stag Theatre, there is no solely devoted cinema facility in Sevenoaks District at present and the Council should work with landowners and operators to investigate the opportunity for introducing such a facility into the District. It is recommended that Sevenoaks town centre would be the most suitable location for this facility. A small-scale / 'boutique' cinema would likely be the most appropriate form of development.
- **STC9** — Whilst we do not consider there to be a pressing qualitative need for the development of additional convenience goods floorspace in Sevenoaks town centre in the short term, owing to the positive qualitative need identified for new convenience goods floorspace in the Sevenoaks urban area, applications which seek to provide additional convenience goods floorspace and further enhanced consumer choice should be supported in principle.
- **STC10** — There is an opportunity for land to the east of High Street, taking in the bus stands adjacent to Boots, and the adjacent Buckhurst surface car park accessed from Suffolk Way / Akehurst Lane, to be redeveloped to accommodate some of the identified comparison goods floorspace capacity. A scheme on this site could also potentially take into account the demolition / redevelopment of the M&Co unit on High Street, which is under-used and offers redevelopment potential. Such a scheme would be dependent on the relocation of bus interchange facilities (and markets which operate from the car park) to a suitable alternative central site.
- **STC11** — There is an opportunity for the Royal Mail sorting office/depot at London Road / South Park to be redeveloped to accommodate a mix of town centre uses which would contribute to enhancing the vitality and viability of the town centre to a greater extent than the current uses do. Reflecting its location adjacent to The Stag theatre and a number of restaurants on London Road, there may be scope for a small cinema facility (see **STC8**) to be accommodated as part of any redevelopment.
- **STC12** — The Council should continue to invest in and support the Wednesday and Saturday markets in Sevenoaks town centre, as these provide an important complementary offer and act as footfall drivers. Opportunities should be explored for

further promotion of the markets, broaden the range of special events (such as night markets, for example) and diversify the range of goods sold in order to further broaden its current offer.

- **STC13** — A co-ordinated approach to place marketing and the promotion of special events in the town centre should be undertaken in conjunction with key stakeholders in the town centre, such as the Sevenoaks Town Partnership. There may be scope for 'branding' of areas of the town centre, such as the cluster of independent retailers between London Road and the High Street, as part of any place marketing strategy.
- **STC14** — Whilst the environmental quality of Sevenoaks town centre is generally good, the Council should continue to invest in improving the public realm and visual appearance of the town centre, supporting a high quality public realm and good levels of pedestrian navigability.
- **STC15** — Improvements to the linkages between the town centre and Knole House should be developed and implemented – both in terms of physical linkages (better directional signage for example) and joint marketing of the two locations as a 'destination'.

### Swanley town centre recommendations

- 9.23 As our policy analysis established, the Council has long-standing ambitions for the regeneration of Swanley town centre and it is clear that, from our health check analysis, this need for regeneration remains. The centre has the ingredients for a successful town centre — a strong anchor store (in the form of a particularly large Asda store), a reasonable (albeit limited) range of complementary units, a pedestrianised shopping environment, and the provision of car parking in close proximity to the centre — but is currently underperforming against many of the health check indicators set out in the PPG.
- 9.24 The Council's regeneration aspirations for Swanley are expected to potentially introduce a significant new residential community into the area, and ensure to support sustainable patterns of shopping; this will further heighten the need for an improved retail offer in the centre. When combined with the fact that appears to be a limited supply of opportunity sites in Sevenoaks town centre (as discussed above) to support the District's identified comparison goods needs, there is a strong policy argument for the majority of the identified comparison goods need to be directed towards improving the retail offer in Swanley.
- 9.25 If the proposals for redevelopment in Swanley town centre do not come forward, we consider there may be a case for reclassification of Swanley as a district centre.
- **SWTC1** — Continue to support and facilitate appropriate growth on sites in Swanley town centre to support and enhance its function as the Secondary Town centre in the District,



and further develop and enhance the attractiveness of the retail and commercial leisure offer in the centre.

- **SWTC2** — Support the redevelopment of Swanley town centre. Any proposals for the redevelopment of the centre should include the provision of additional comparison goods retail floorspace, to improve the diversity of uses in the centre, enhance its attractiveness, and assist in meeting the identified quantitative retail need this study has identified.
- **SWTC3** — The core function of Swanley town centre as a comparison and convenience goods shopping destination should be protected and enhanced. The focus of Swanley Square should be on comparison goods and convenience goods, and applications for changes of use away from these should be carefully monitored.
- **SWTC4** — The Council should develop and implement robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — comes forward in the centre.
- **SWTC5** — Swanley town centre should along with Sevenoaks, be the focus of the identified District-wide comparison goods capacity requirements of 9,100 sq.m net floorspace by 2025 / 21,700 net sq.m by 2035. Based on current performance, there is a requirement for a minimum of 800 sq.m net by 2025 / 2,000 sq.m net by 2035 additional comparison goods floorspace to come forward in Swanley, but, reflecting the Council's aspirations for the regeneration of the centre and planned uplift in residential numbers, a greater proportion of the identified District-wide need should be allocated to the centre.
- **SWTC6** — The Council should consider favourably proposals which seek to provide new comparison goods floorspace in Swanley town centre. This could include modernisation / amalgamation of existing units within the primary shopping frontage to provide larger-format units which may be more attractive to higher-profile operators.
- **SWTC7** — Sub-division of existing retail units within the primary shopping frontage in Swanley town centre should be resisted.
- **SWTC8** — Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversity the offer/mix in the centre.
- **SWTC9** — Whilst we do not consider there to be a pressing need for additional convenience goods floorspace in Swanley town centre, there may be scope for additional provision to come forward within or well-integrated edge of the centre if a suitable site becomes available over the course of the Plan period, in order to assist in alleviating the over-trading of existing foodstores in the centre and enhancing consumer choice.

- **SWTC10** — The Council should work with the owners of Swanley Square and other key landowners to help deliver a co-ordinated, uniform approach to improving the environmental quality of the centre, including public realm and wayfinding enhancements, the provision of additional green spaces / planting, public seating and so on. A coherent approach to other matters such as car parking prices would also be beneficial.
- **SWTC11** — The Council will need to decide an appropriate strategy for the part of the centre which falls south of the railway line, on London Road/Station Road. We would not recommend that this area forms part of the defined primary frontage, but should be classified as secondary shopping frontage. The Council should secure investment to enhance linkages of the shopping facilities on London Road/Station Road with the rest of the town centre, in order for it to benefit to as great an extent as possible for any regeneration initiatives which are progressed.
- **SWTC12** — The Council should continue to invest in and support the markets in Swanley town centre, as these provide an important complementary offer and act as footfall drivers. Opportunities should be explored for further promotion of the markets, broaden the range of special events (such as night markets, for example) and diversify the range of goods sold in order to further broaden its current offer.
- **SWTC13** - We note that a planning application for a retail and residential-led redevelopment of Swanley Square has recently been submitted.

### Edenbridge rural service centre recommendations

- 9.26 Our analysis has demonstrated that Edenbridge town centre is displaying good levels of vitality and viability at present. The conversion of a former Co-Op store to a Waitrose has provided the town centre with a strong 'anchor' store, and the rest of the retail offer, including a number of specialist independent retailers and a particular focus on the antiques sector, is a further asset to the town. There are also a good range of supporting uses such as cafes and restaurants.
- 9.27 There is only one supermarket in Edenbridge capable of meeting main/bulk shopping needs, which is the in-centre Waitrose store. This store has a dominant effect on local convenience shopping, and there may be a qualitative case for additional provision in the town to improve consumer choice and introduce competition. However, development opportunities in and on the edge of the town centre are limited, and accordingly any applications for new development would need to demonstrate compliance with relevant national policy 'tests' (in respect of the sequential and impact assessment) in order to show that the vitality and viability of the town centre would not be adversely affected.

- **ERSC1** — The role and function of Edenbridge as a rural service centre should be protected and enhanced over the course of the Council's new Local Plan period.
- **ERSC2** — The Council should not plan for the development of a significant quantum of additional comparison goods retail floorspace in Edenbridge, owing to the constrained nature of the centre and limited opportunities for expansion. Development of a significant amount of additional floorspace would also result in Edenbridge undertaking a role and function not in keeping with its classification as a rural service centre.
- **ERSC3** — Applications which seek to enhance existing provision, or provide new retail floorspace appropriate in scale to the role and function of the centre should be supported in principle. Applications for the development of other 'town centre' uses should also be supported in principle where they will make a positive contribution to the vitality and viability of the centre, providing they are of a scale appropriate to the role and function of the centre.
- **ERSC4** — The Council should develop and implement robust frontage policies, defining primary and secondary shopping areas. These policies will assist in ensuring that a 'critical mass' of comparison goods retail floorspace — which is key to driving footfall and visitor numbers — comes forward in the centre.
- **ERSC5** — Applications which seek to enhance the range of complementary 'main town centre uses' in secondary shopping frontages and the wider town centre area should be supported in principle, particularly where they help to further diversify the offer/mix in the centre.
- **ERSC6** — The Council should seek to ensure that the Edenbridge continues to meet a broad range of day-to-day shopping needs as possible, and therefore applications which would result in a reduction in the number of units in the centre (and therefore a reduction on the diversity of uses) should generally be resisted.
- **ERSC7** — There is a qualitative case for introduction of additional supermarket provision in Edenbridge, of a scale appropriate to the role and function of the centre, in order to introduce competition and improve consumer choice. If this cannot be accommodated on an in-centre site, compliance with relevant national and local retail policy 'tests' (in respect of the sequential and impact tests) will need to be satisfactorily demonstrated.
- **ERSC8** — The Council should ensure that if significant new residential growth comes forward at Edenbridge, it is supported by a sufficient range of local shopping facilities to enable sustainable patterns of shopping to be met. Any new retail floorspace which comes forward as part of a new residential development would be expected to meet local day to day shopping needs only (indicatively we would suggest between 500 and 1,000 sq.m net floorspace in total).

- **ERSC9** — The Council should seek to deliver public realm / environmental enhancements to Edenbridge, to ensure it remains a vibrant and attractive centre. There is a particular need to deliver public realm improvements along High Street, and enhance linkages between High Street and the Waitrose store.
- **ERSC10** — Edenbridge performs an important role as a specialist retail destination and the Council should continue to support, and where possible, promote this.

## Local service centres recommendations

9.28 Our analysis has demonstrated that the other key settlements in the District — the local service centres of Westerham, New Ash Green and Otford — perform a role and function which is more orientated towards meeting day to day shopping needs. In the case of Westerham and, Otford, the vitality and viability of the centre is also supported by a good range of cafes, restaurants and similar complementary uses, and these should be supported, although this should not come at the expense of the core retail function in these centres.

9.29 New Ash Green is a centre which is struggling for vitality and viability compared to the other local service centres and a co-ordinated approach to bringing forward improvements to the centre, alongside local landowners, will be required. The Council may need to consider acquisition of land/assets in the centre to help progress the regeneration of the centre, as the fragmented ownership and lack of local landlords is likely to act as a barrier to any substantial improvements in the centre coming forward. However, the 'anchor' foodstore (the Co-op) is performing well, and some local shopping needs can be met. We would anticipate that, along with Swanley, New Ash Green will be the focus for the Council's regeneration activities over the course of the new Local Plan period.

- **RSC1** — The role and function of Westerham, New Ash Green and Otford as local service centres should be protected and enhanced over the course of the Council's new Local Plan period.
- **RSC2** — The Council should not plan for the development of a significant quantum of additional comparison goods retail floorspace in its network of local service centres. Development of significant additional floorspace would result in the centres' undertaking a role and function not in keeping with their classification in the Council's retail hierarchy.
- **RSC3** — Applications which seek to enhance existing provision, or provide new retail floorspace appropriate in scale to the role and function of the centre should be supported in principle. Applications for the development of other 'town centre' uses should also be supported in principle where they will make a positive contribution to the vitality and

viability of the centre, providing they are of a scale appropriate to the role and function of the centre.

- **RSC4** — The Council should seek to ensure that the local service centres continue to meet a broad a range of day-to-day shopping needs as possible, and therefore applications which would result in a reduction in the number of units in the centre (and therefore a reduction on the diversity of uses) should generally be resisted.
- **RSC5** — The Council should seek to deliver public realm/environmental enhancements to all of its local service centres, to ensure they remain vibrant and attractive destinations over the course of the new Local Plan period.
- **RSC6** — In New Ash Green, in the short to medium term the Council should consider development of a centre-wide public realm strategy to improve the appearance of the centre and its attractiveness as a destination to meet local needs. In the longer-term, the Council may wish to investigate acquisition of units/sites in the centre in order to drive forward its regeneration.
- **RSC7** — The Council should seek to enhance and promote 'unique selling points' of its network of rural and local service centres, for example:

*Westerham* — enhanced linkages with / joint promotion with Quebec House / Chartwell;

*Oxford / Westerham* — promotion as local food hubs, which could include specialist markets / events with local suppliers, encouragement of retailers to sell local produce, and so on.

## Monitoring and next steps

- 9.30 Our study has identified that the centres in the District benefit, for the most part, from good levels of vitality and viability, and whilst some centres have areas where improvements need to come forward, they are – for the most part - currently able to meet many residents' shopping needs. The Council should seek to continue to promote and enhance its network of centres throughout its new Local Plan period, and it is considered that the regeneration of the centres of Swanley and New Ash Green should form priorities for the Council.
- 9.31 The Council should ensure its retail capacity forecasts remain up to date throughout its new Local Plan period by refreshing its evidence base to take into account changes in population and expenditure projections, 'special forms of trading' forecasts, 'commitments' for new retail development and so on.

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- APPENDIX I LOCAL CENTRES AUDIT MATRIX
- APPENDIX II COMPARISON GOODS CAPACITY TABLES
- APPENDIX III CONVENIENCE GOODS CAPACITY TABLES

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Report date: **September 2016**

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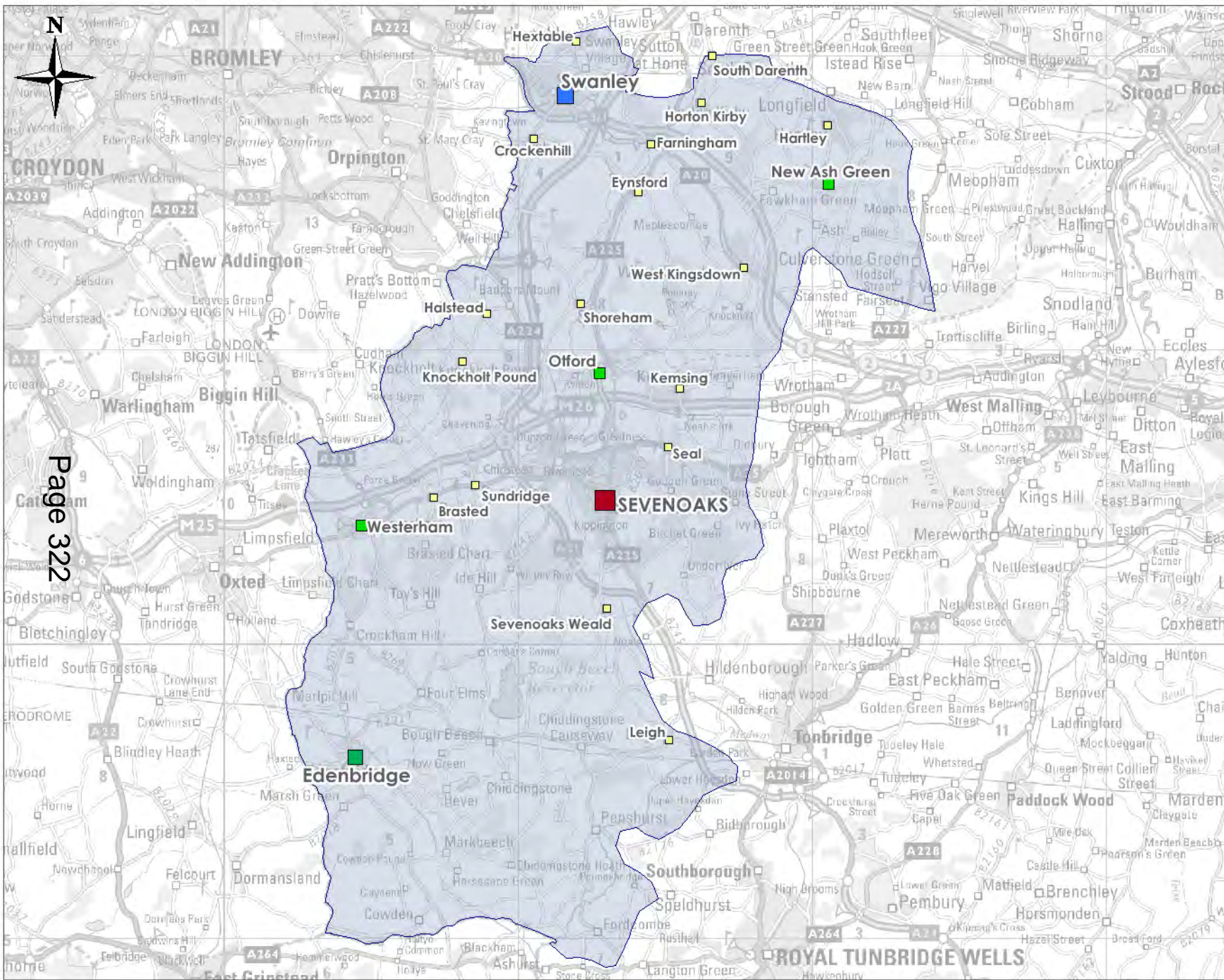
DD: 020 7911 2913/ M:

Switchboard: 0844 902 0304

For and on behalf of GVA Grimley Ltd

# PLANS





### Sevenoaks 2016 Retail Study

- Key
- Study Area
  - Survey Zones
  - Sevenoaks Local Authority Area
  - Principal town centre
  - Secondary town centre
  - Rural service centre
  - Local service centre
  - Service villages

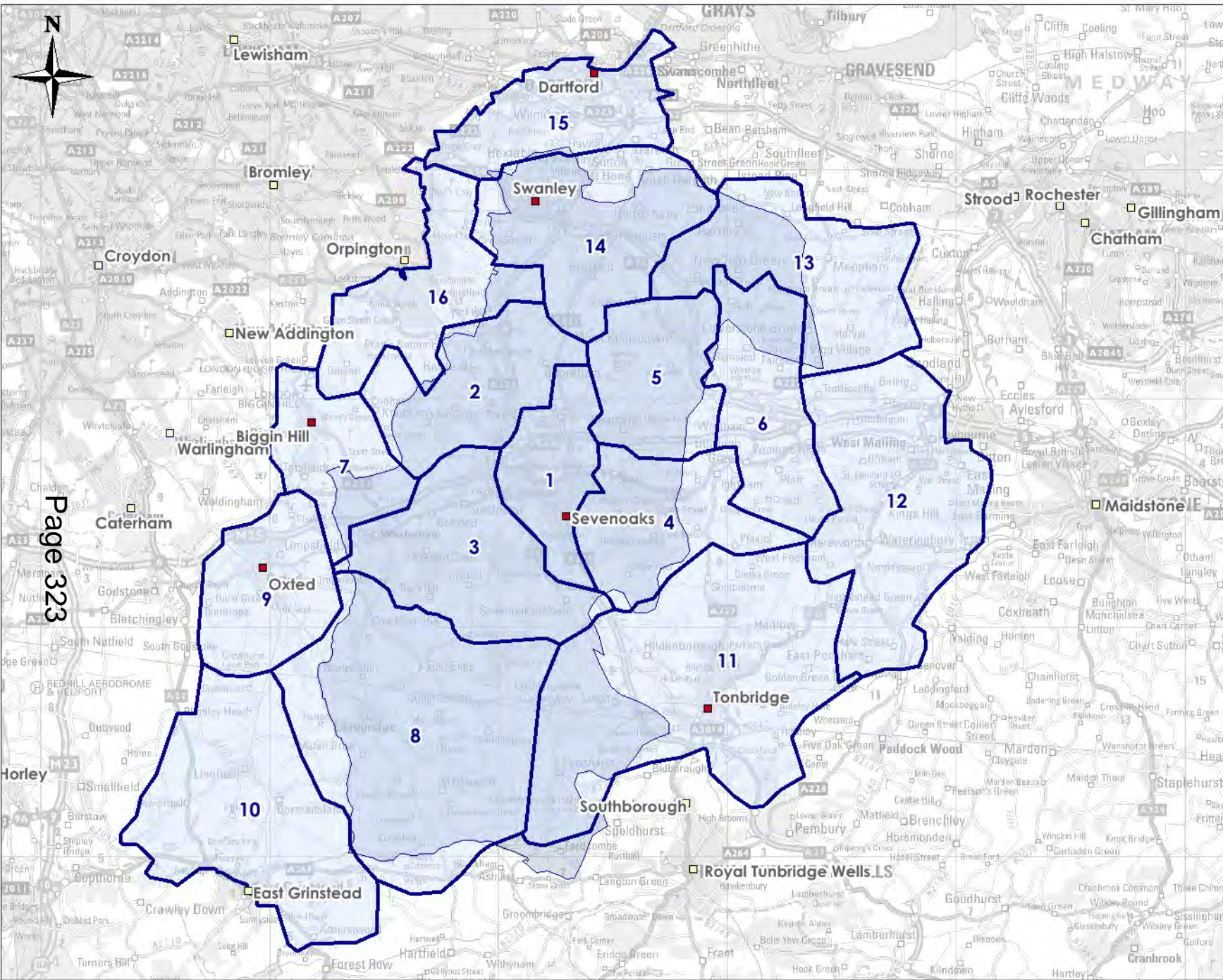
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# Sevenoaks retail hierarchy





**Sevenoaks 2016 Retail Study**

- Key
- Study Area
  - Survey Zones
  - Sevenoaks Local Authority Area
  - Centre within survey area
  - Centre located outside survey area

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# Study area and household survey zones



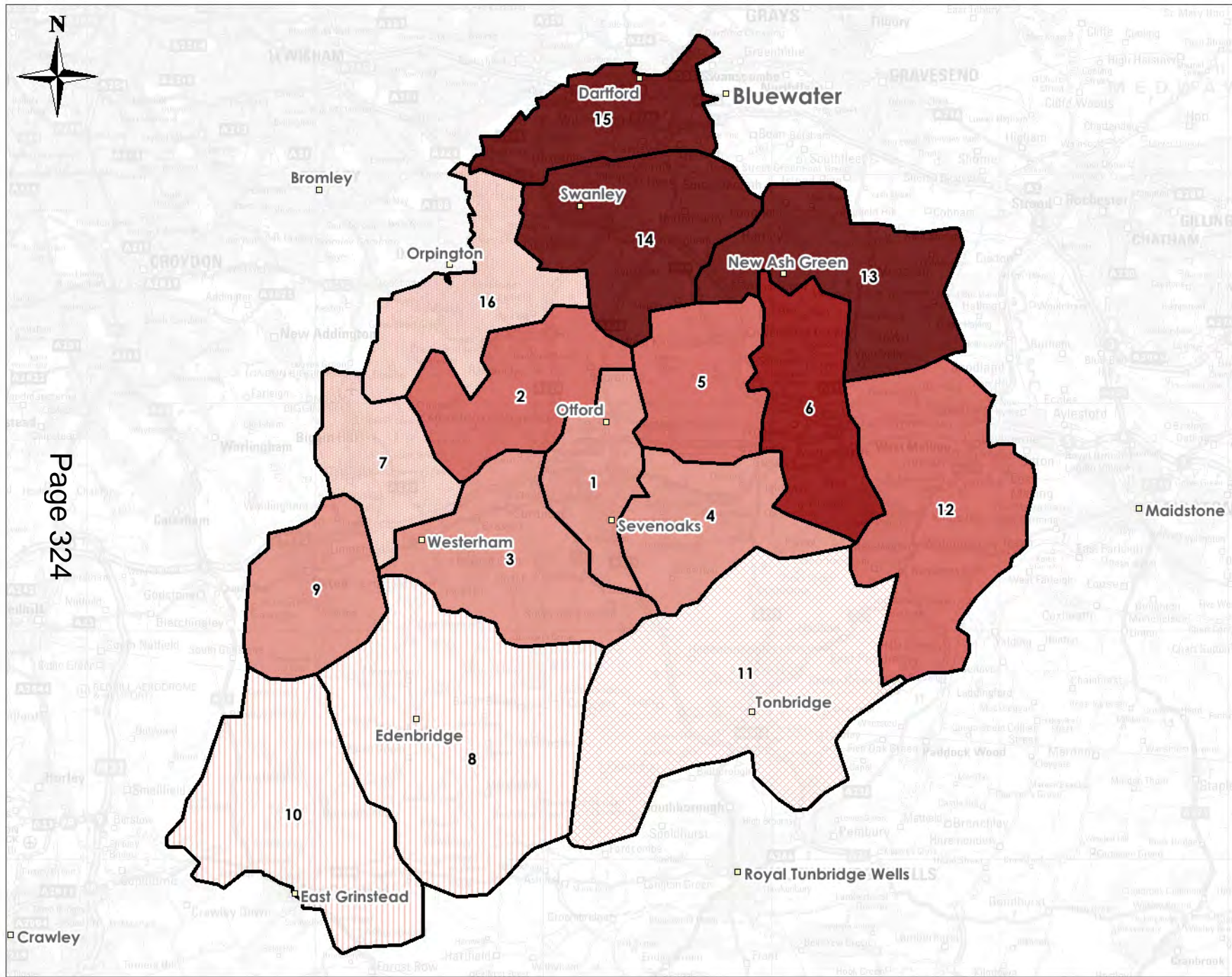
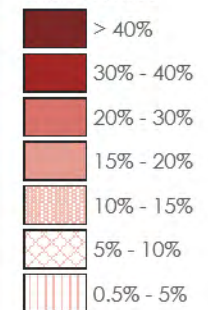


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#### Key

Comparison goods market share



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# Bluewater comparison goods market share

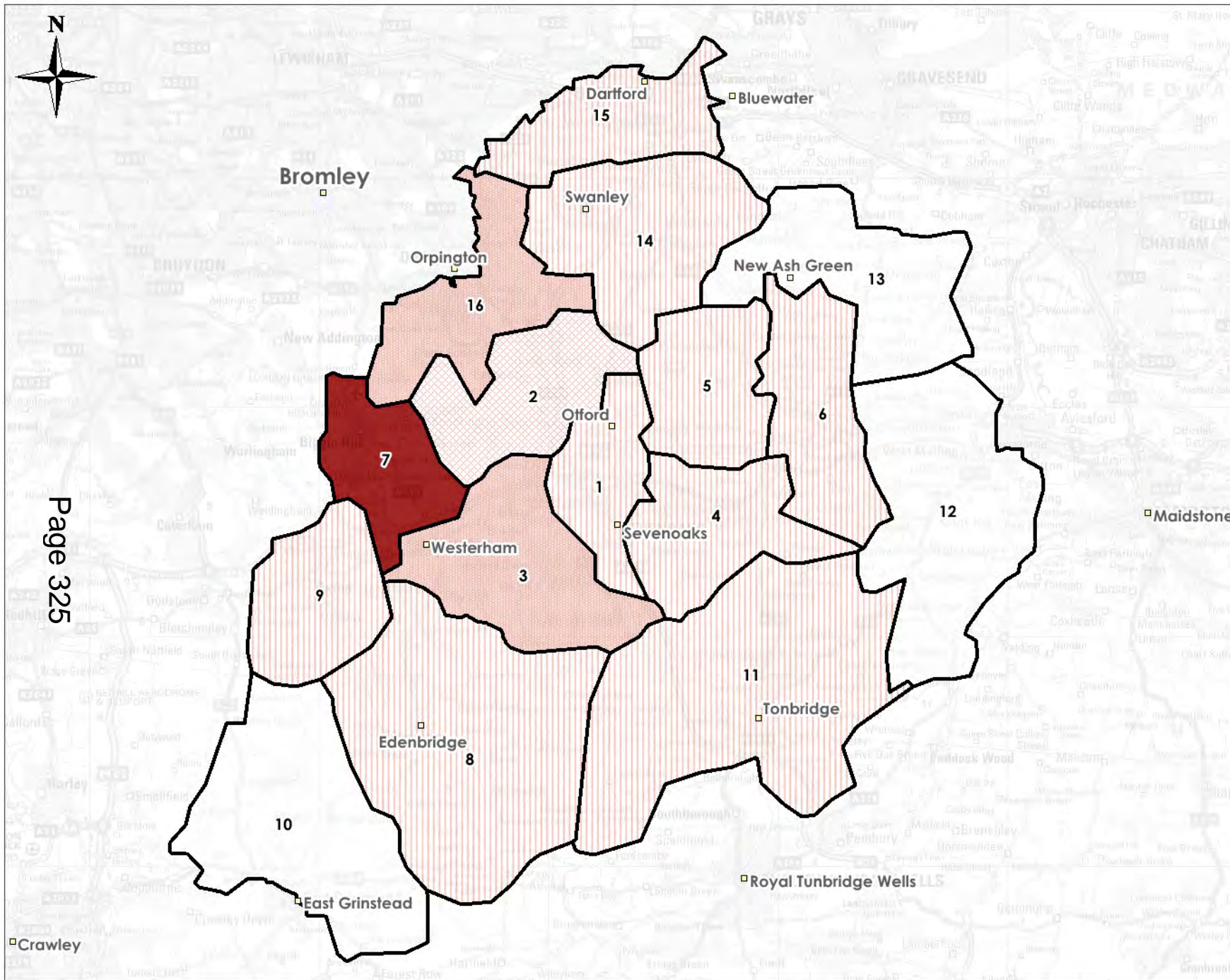
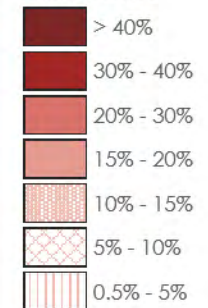




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Comparison goods market share



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# Bromley comparison goods market share



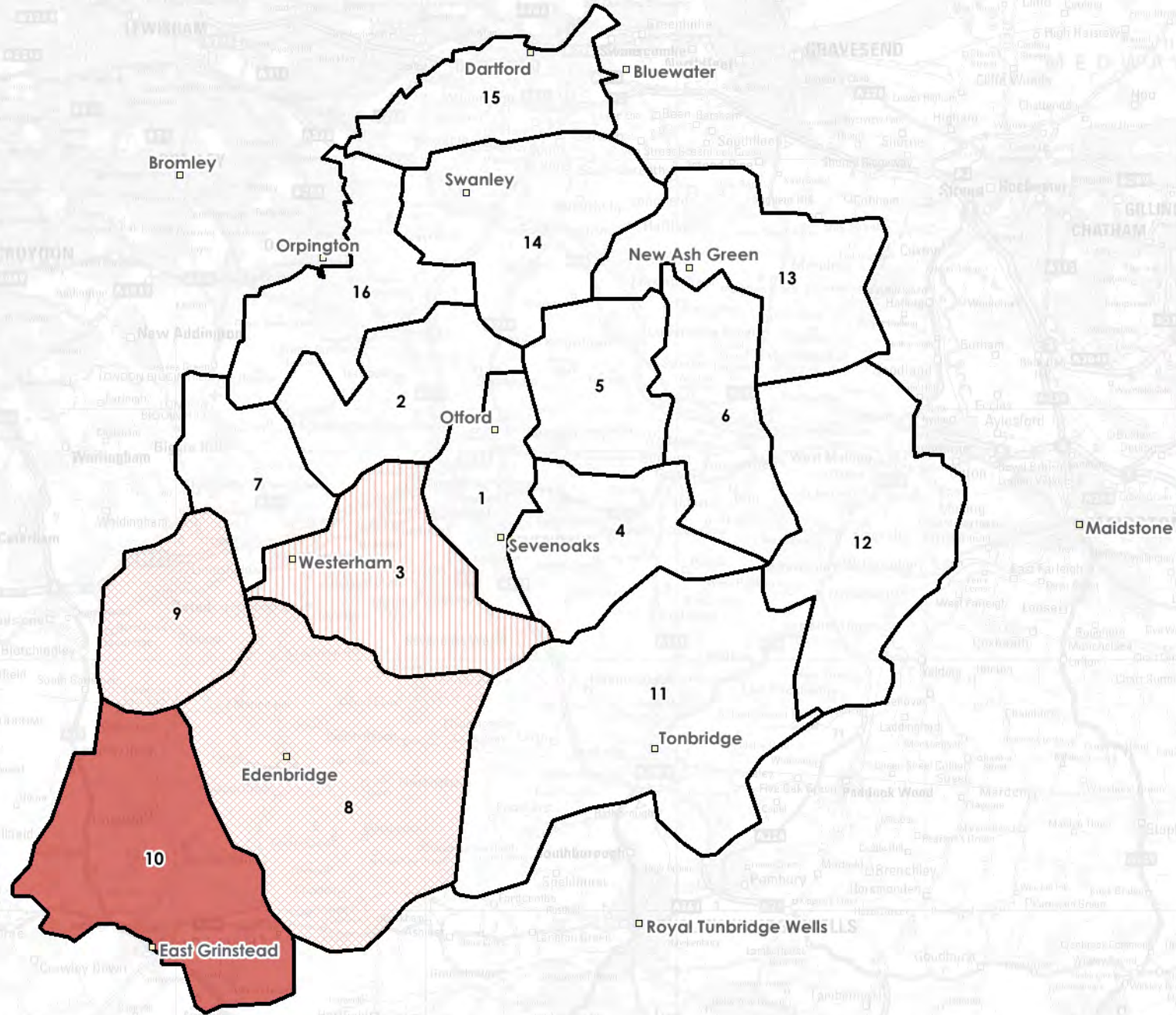
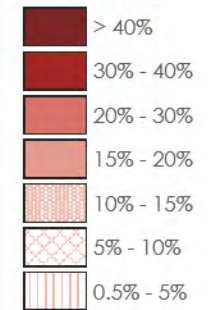


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Comparison goods market share



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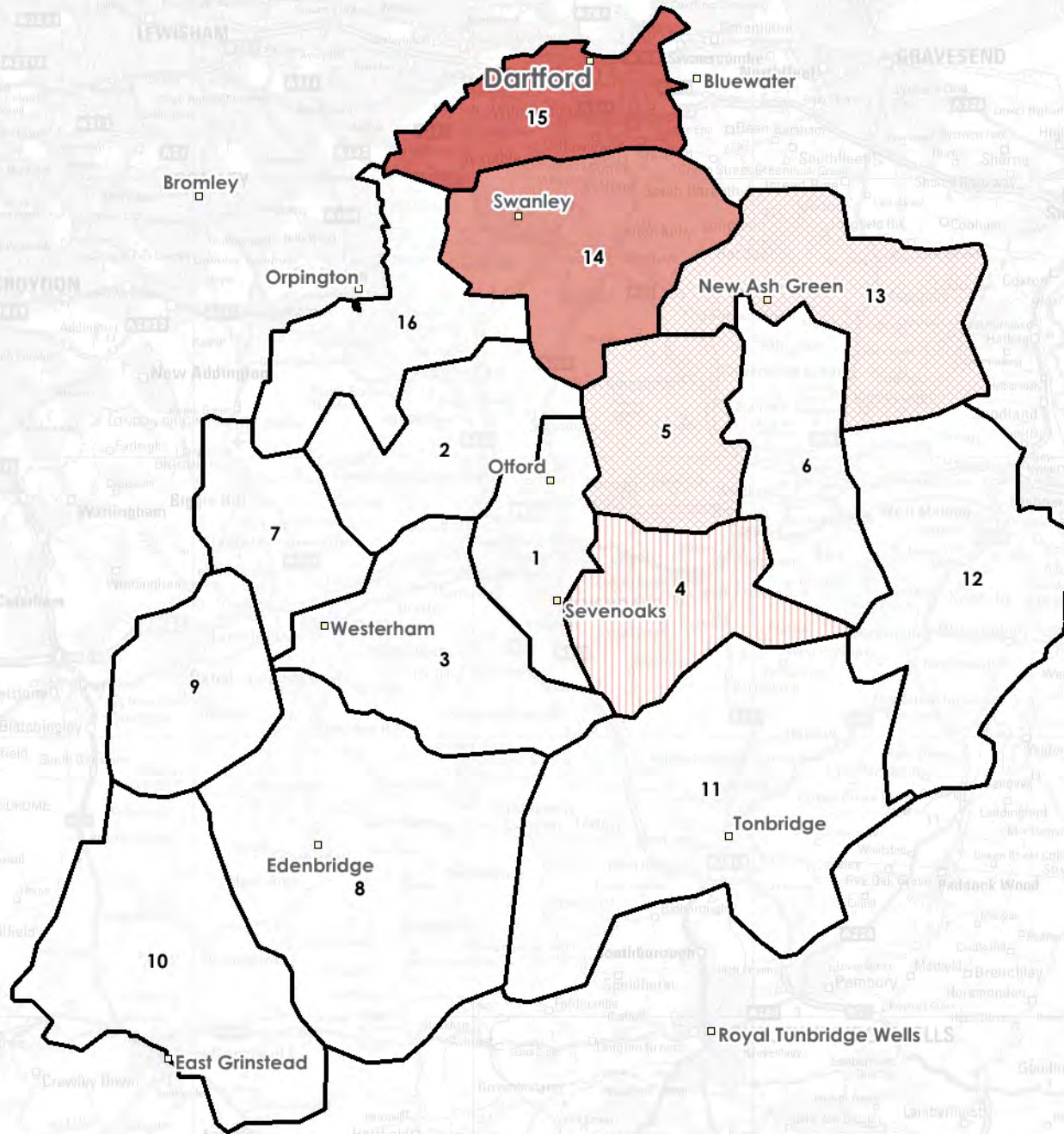
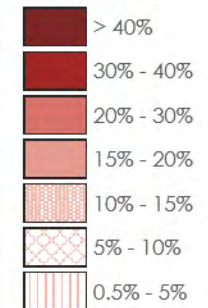
# Crawley comparison goods market share



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#### Key

Comparison goods market share



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# Dartford comparison goods market share



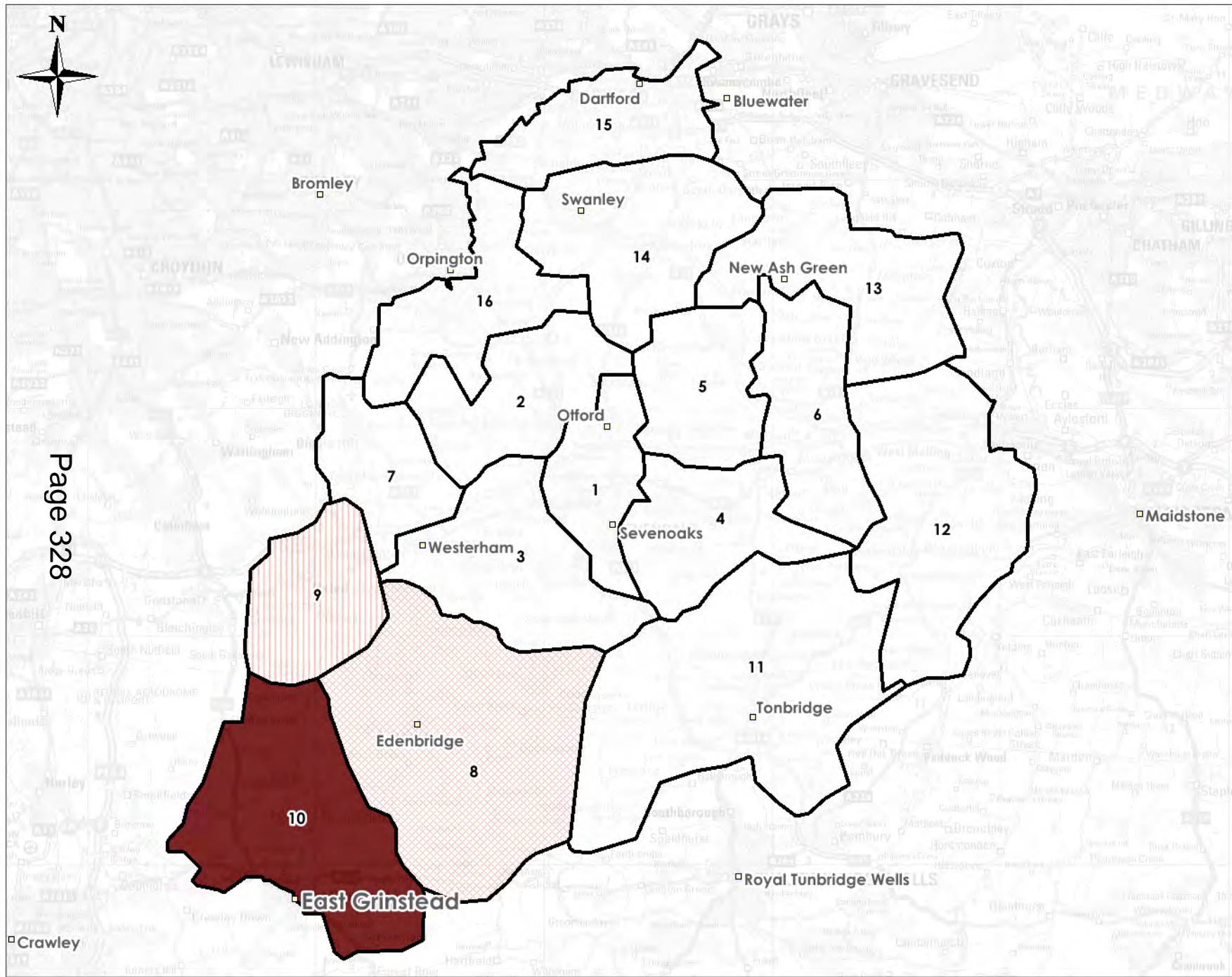
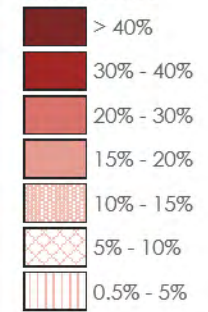


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Comparison goods market share



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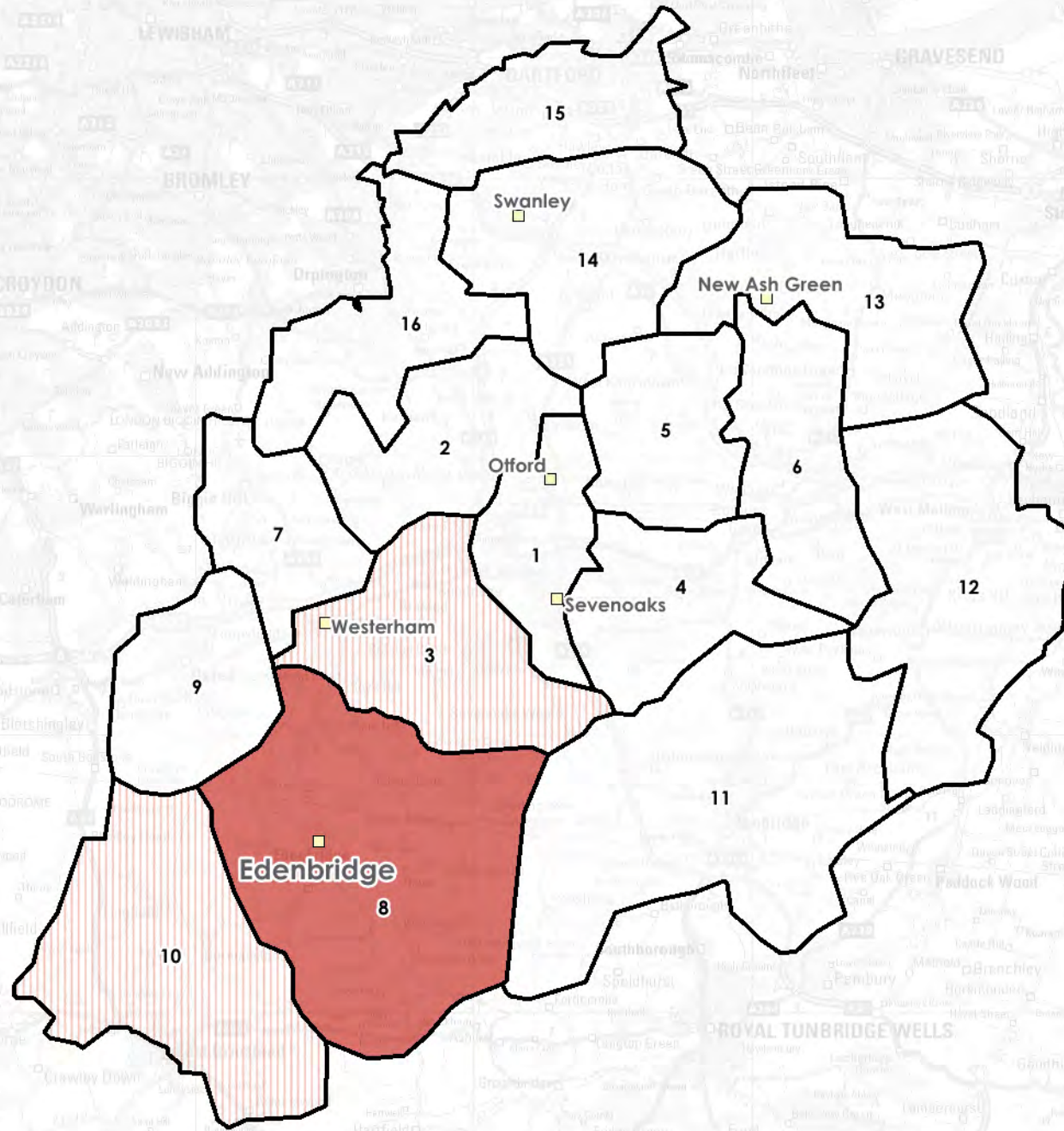
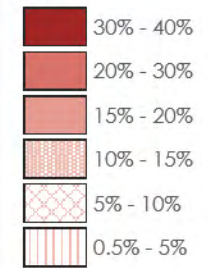
# East Grinstead comparison goods market share



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#### Key

Comparison goods market share



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# Edenbridge comparison goods market share



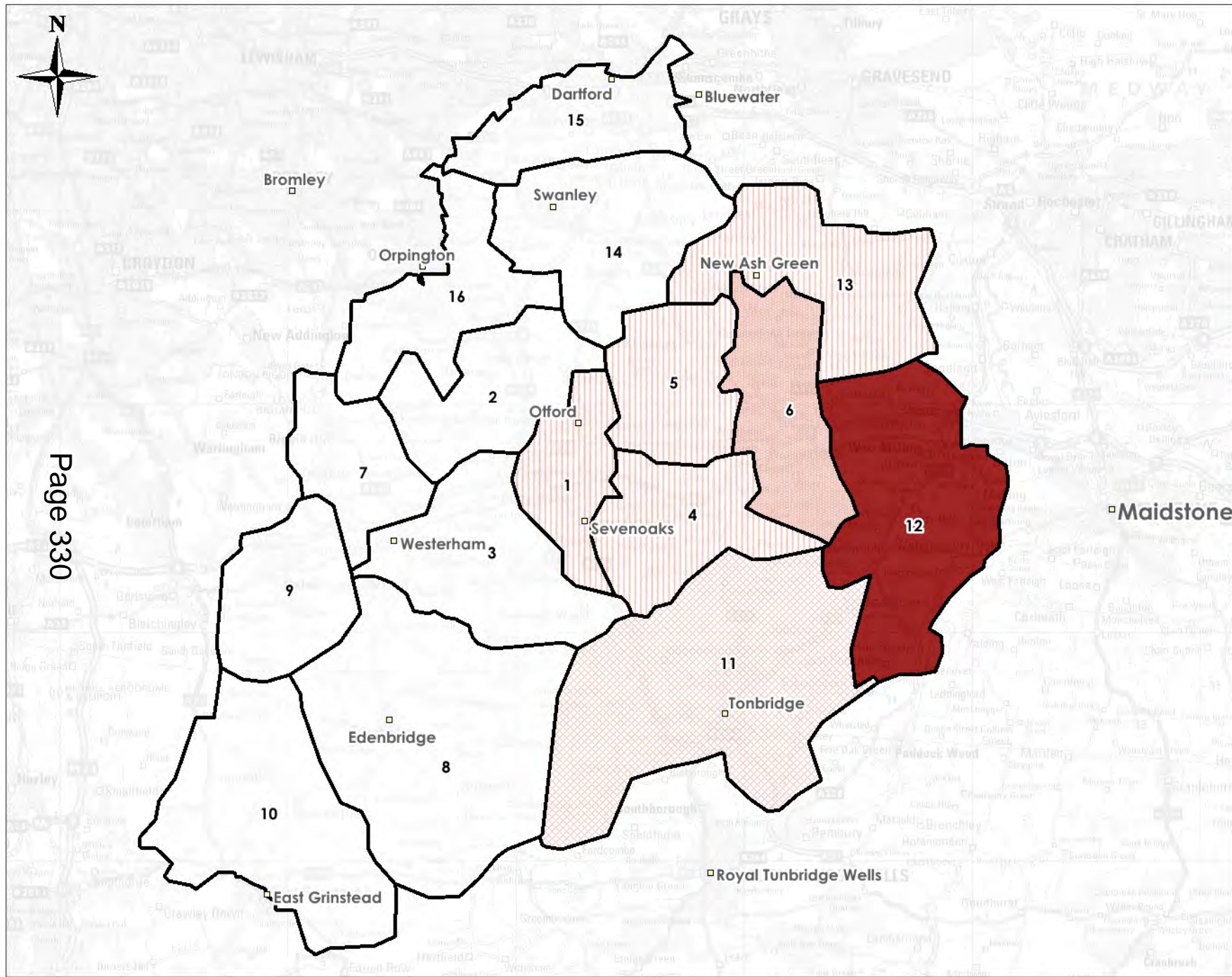
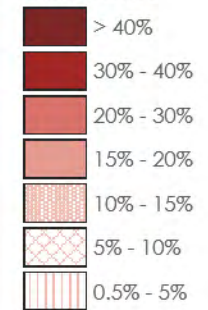


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Comparison goods market share



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# Maidstone comparison goods market share

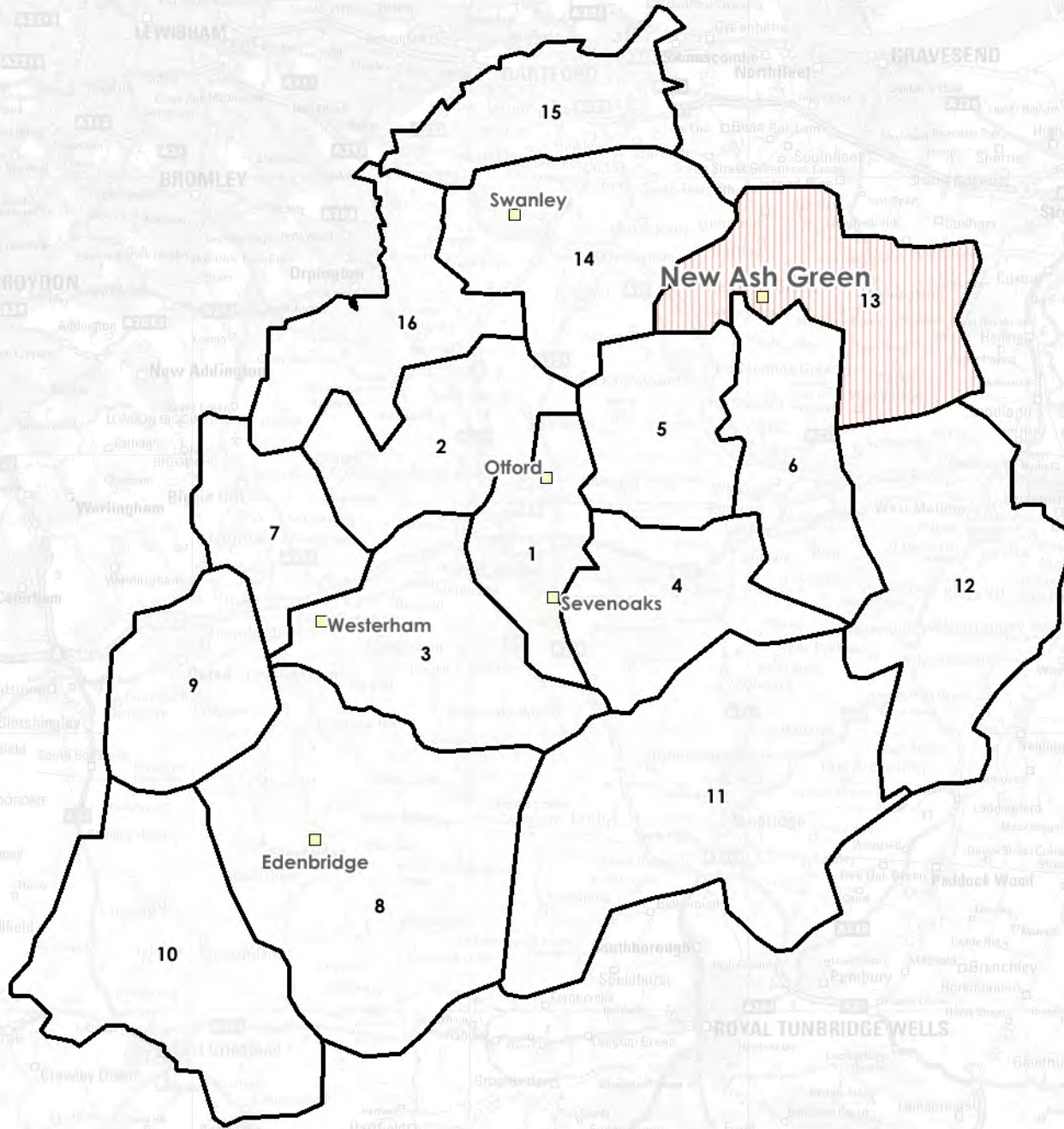
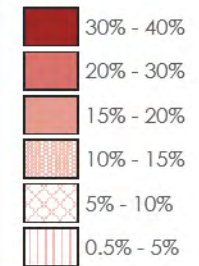




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# New Ash Green comparison goods market share

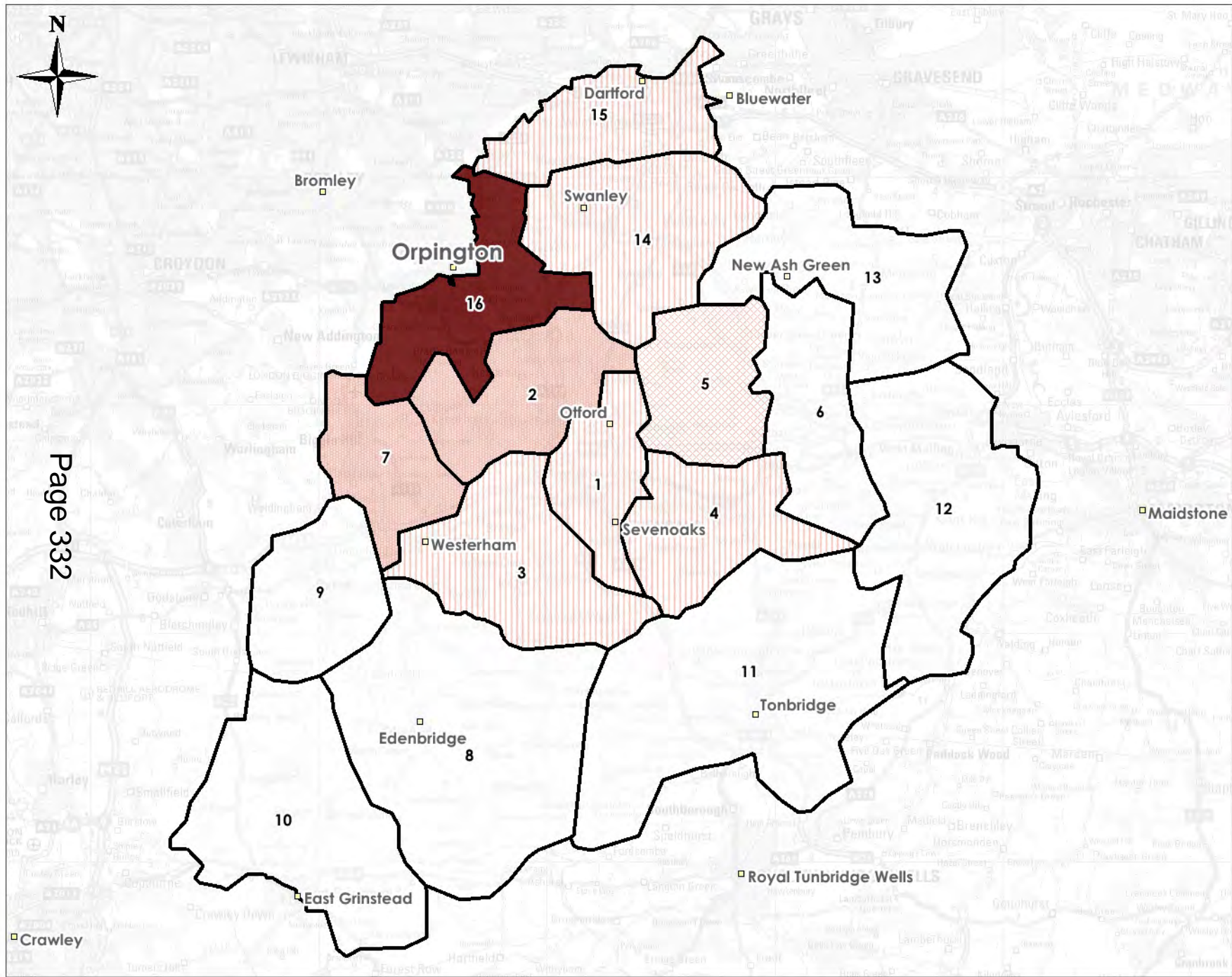
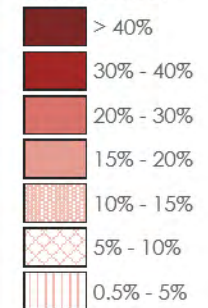


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Comparison goods market shares



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# Orpington comparison goods market share

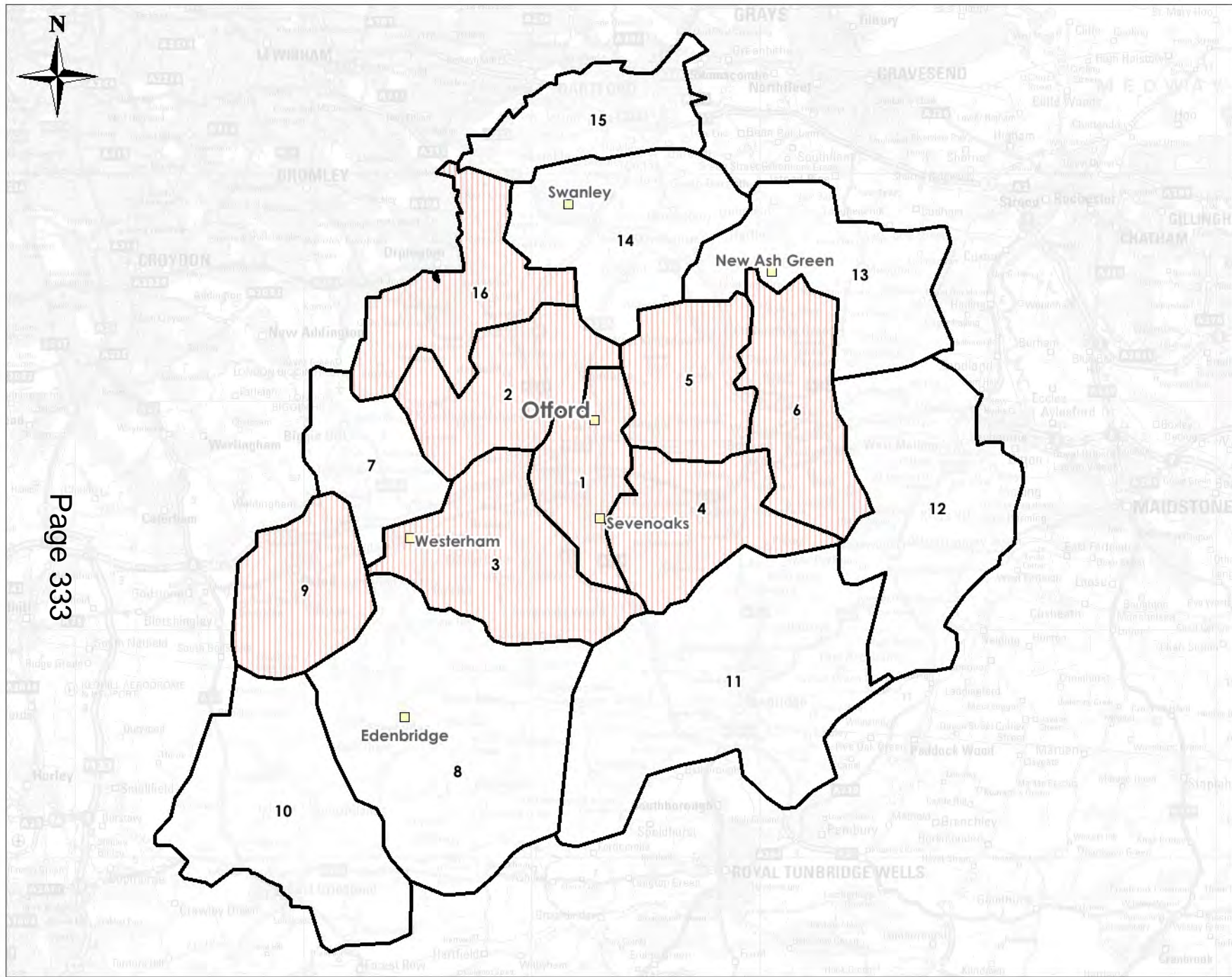
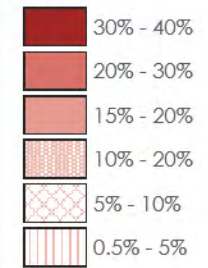




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Comparison goods market share



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# Offord comparison goods market share



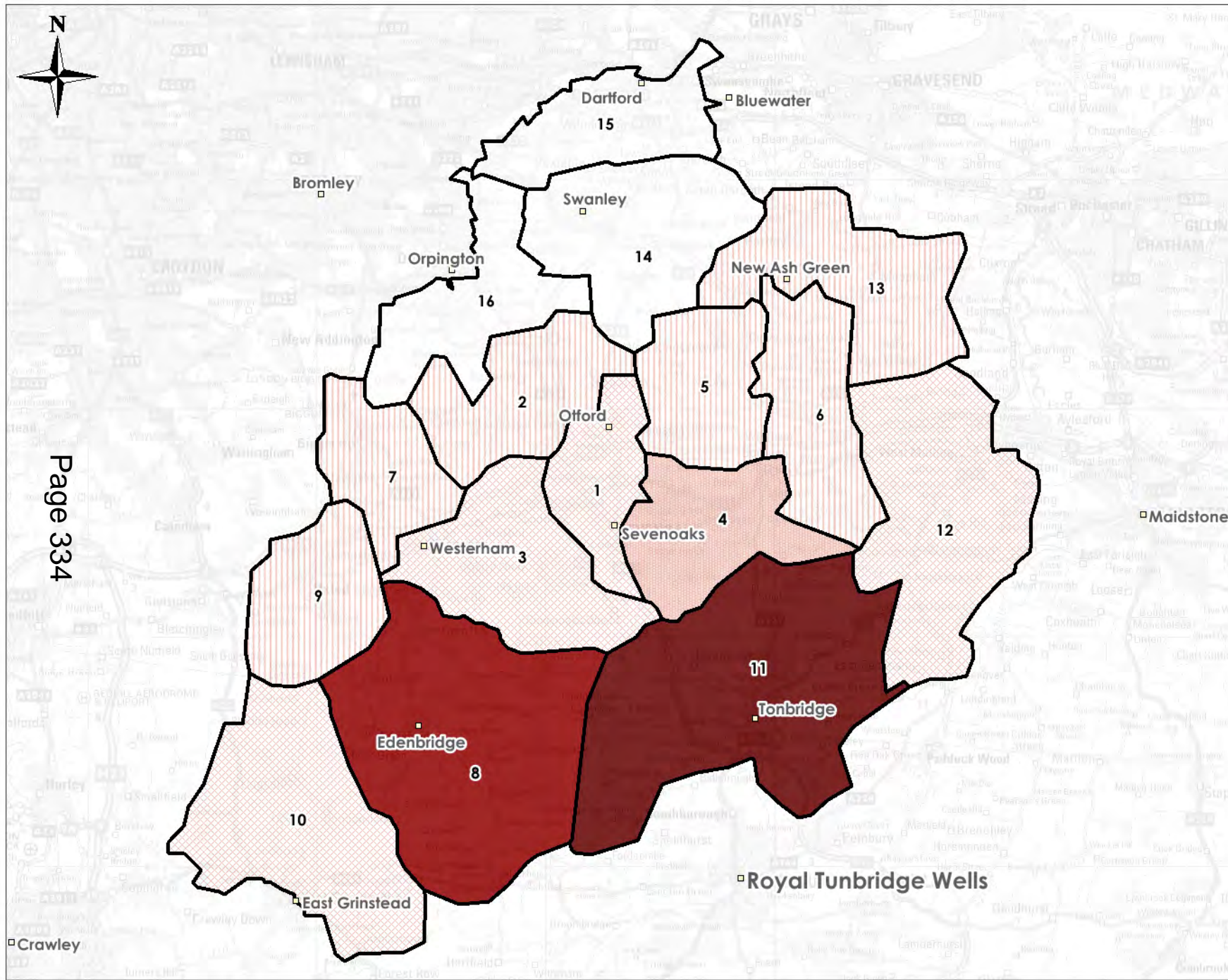
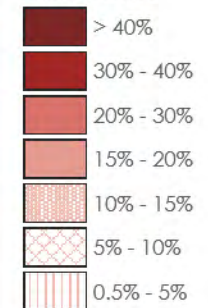


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Comparison goods market share



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# Royal Tunbridge Wells comparison goods market share

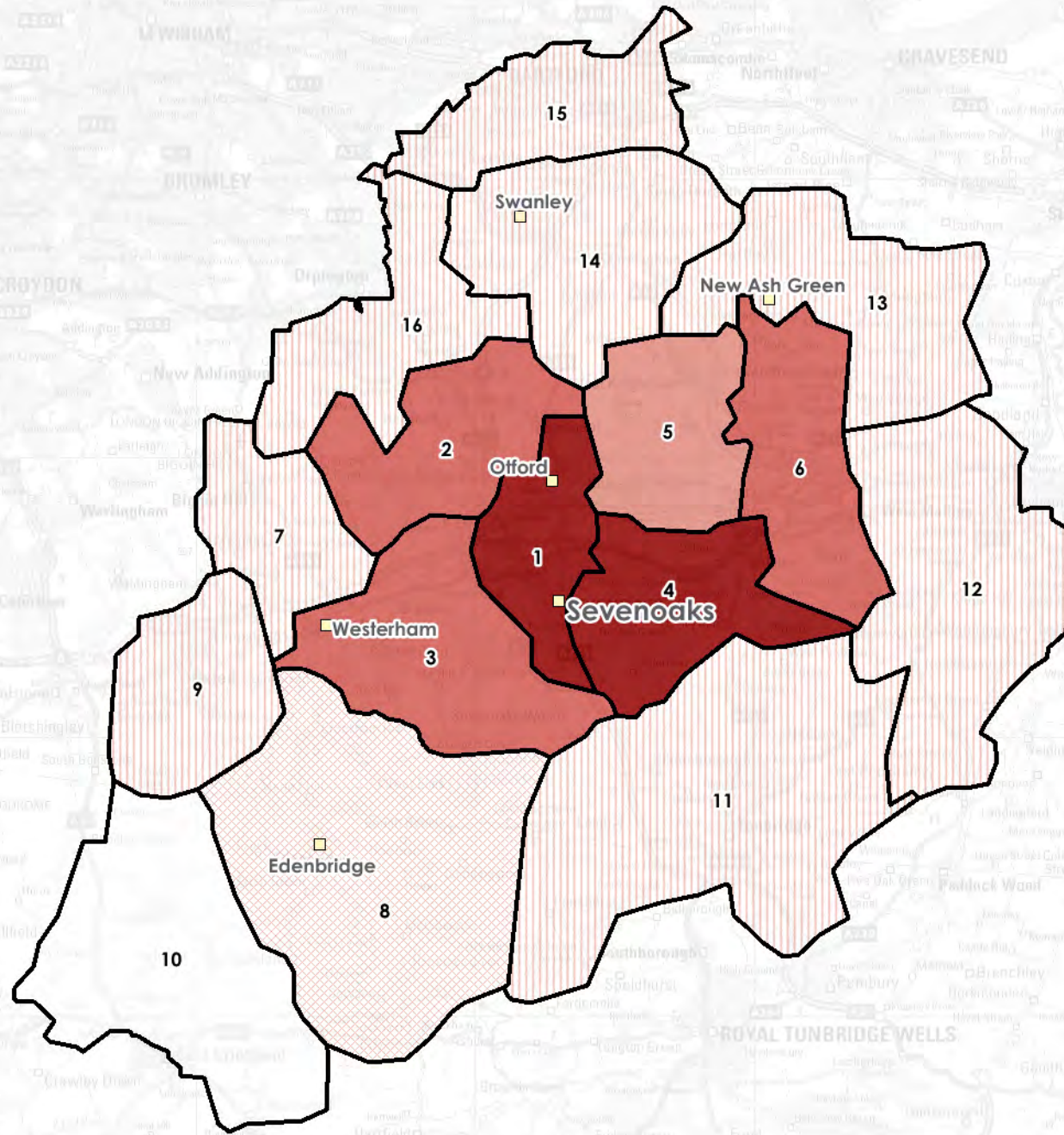
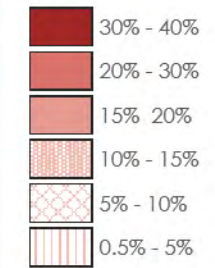




### Sevenoaks 2016 Retail Study

#### Key

Comparison goods market share



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# Sevenoaks Town Centre comparison goods market share



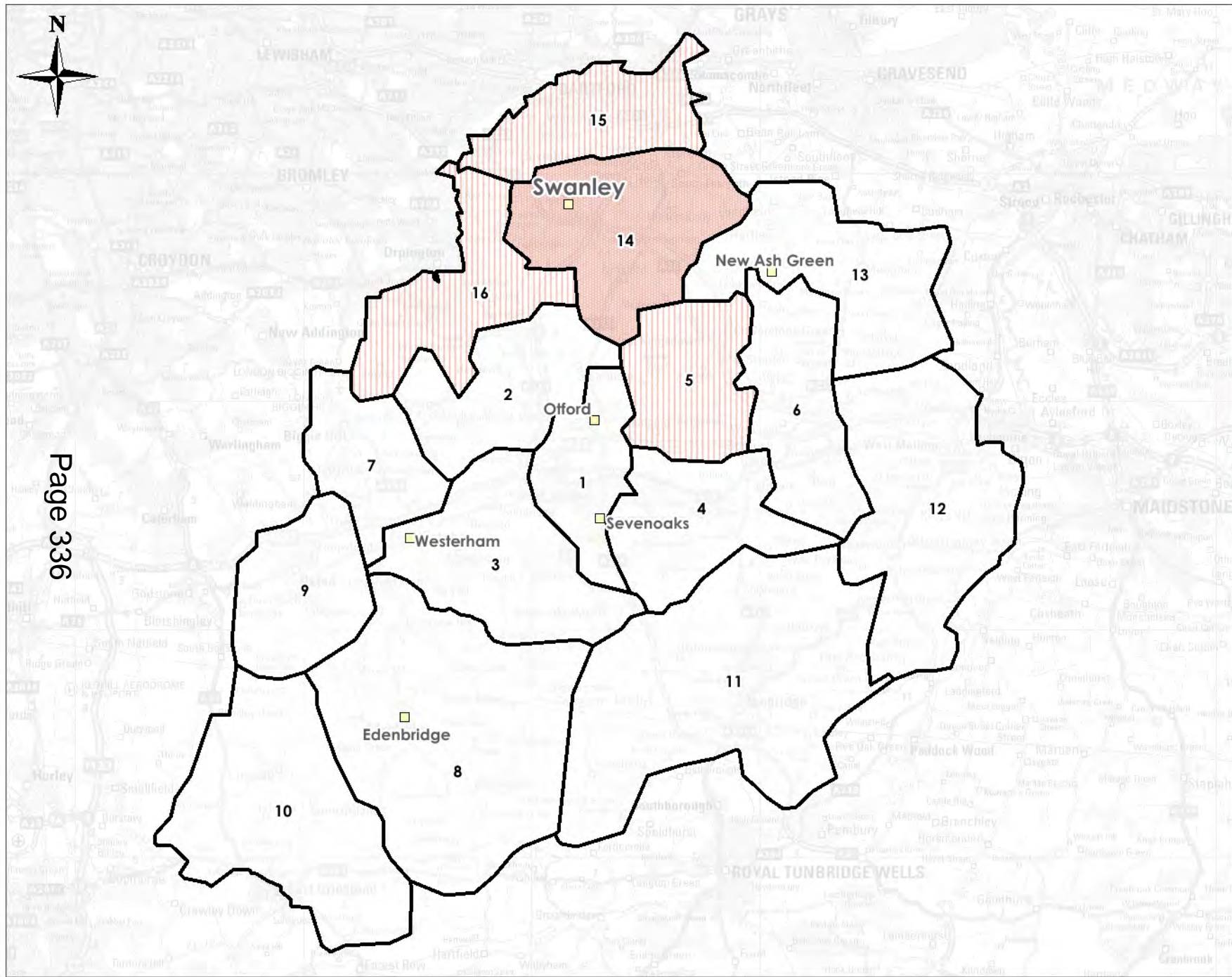
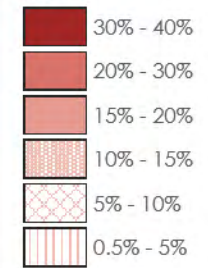


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Comparison goods market share



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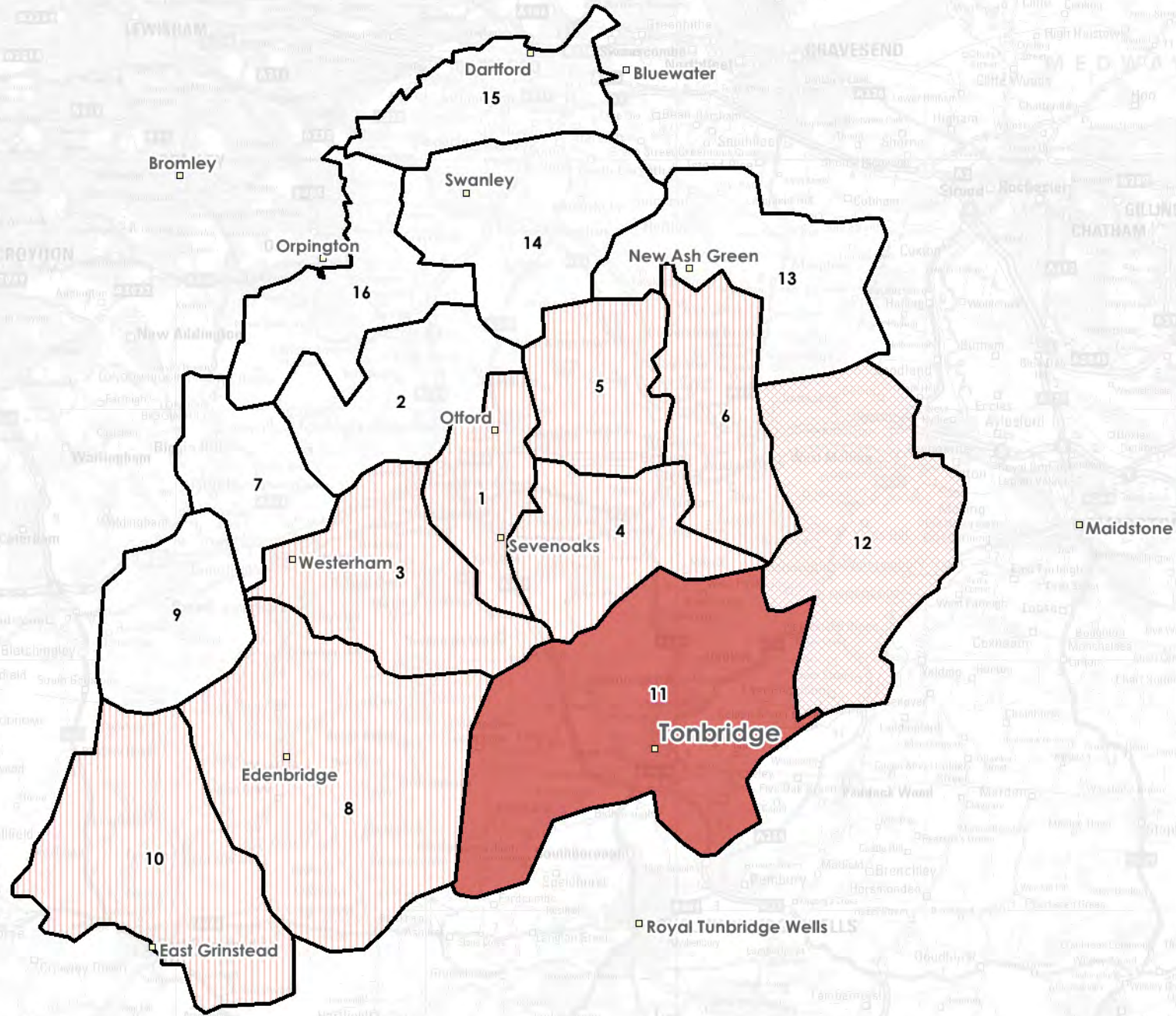
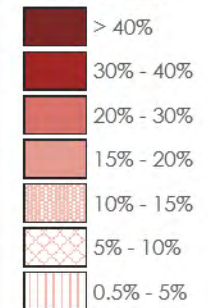
# Swanley comparison goods market share



### Sevenoaks 2016 Retail Study

#### Key

Comparison goods market shares



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# Tonbridge comparison goods market share



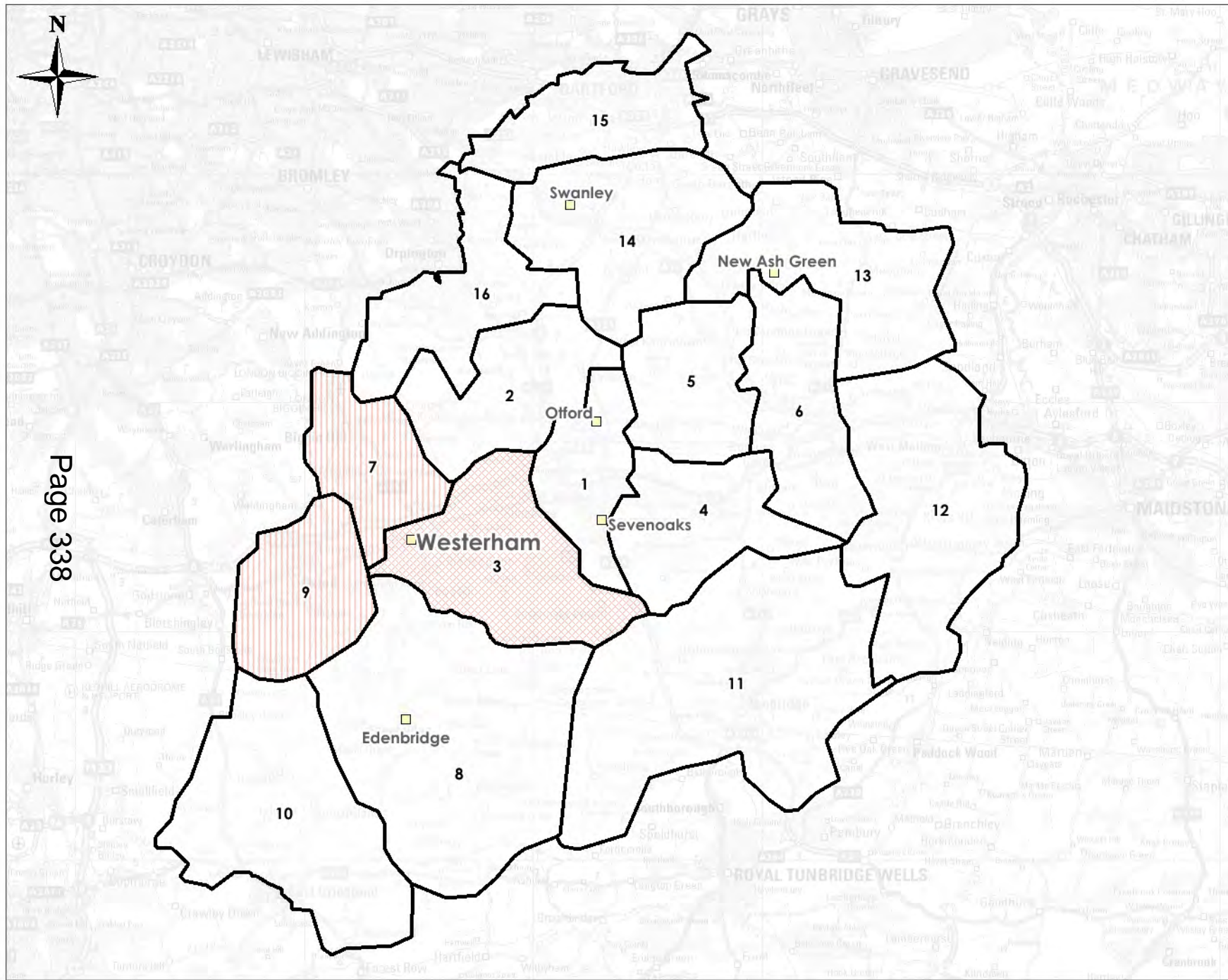
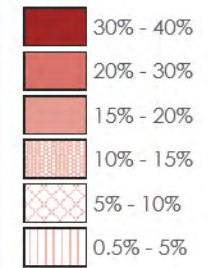


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Comparison goods market share



# Westerham comparison goods market share

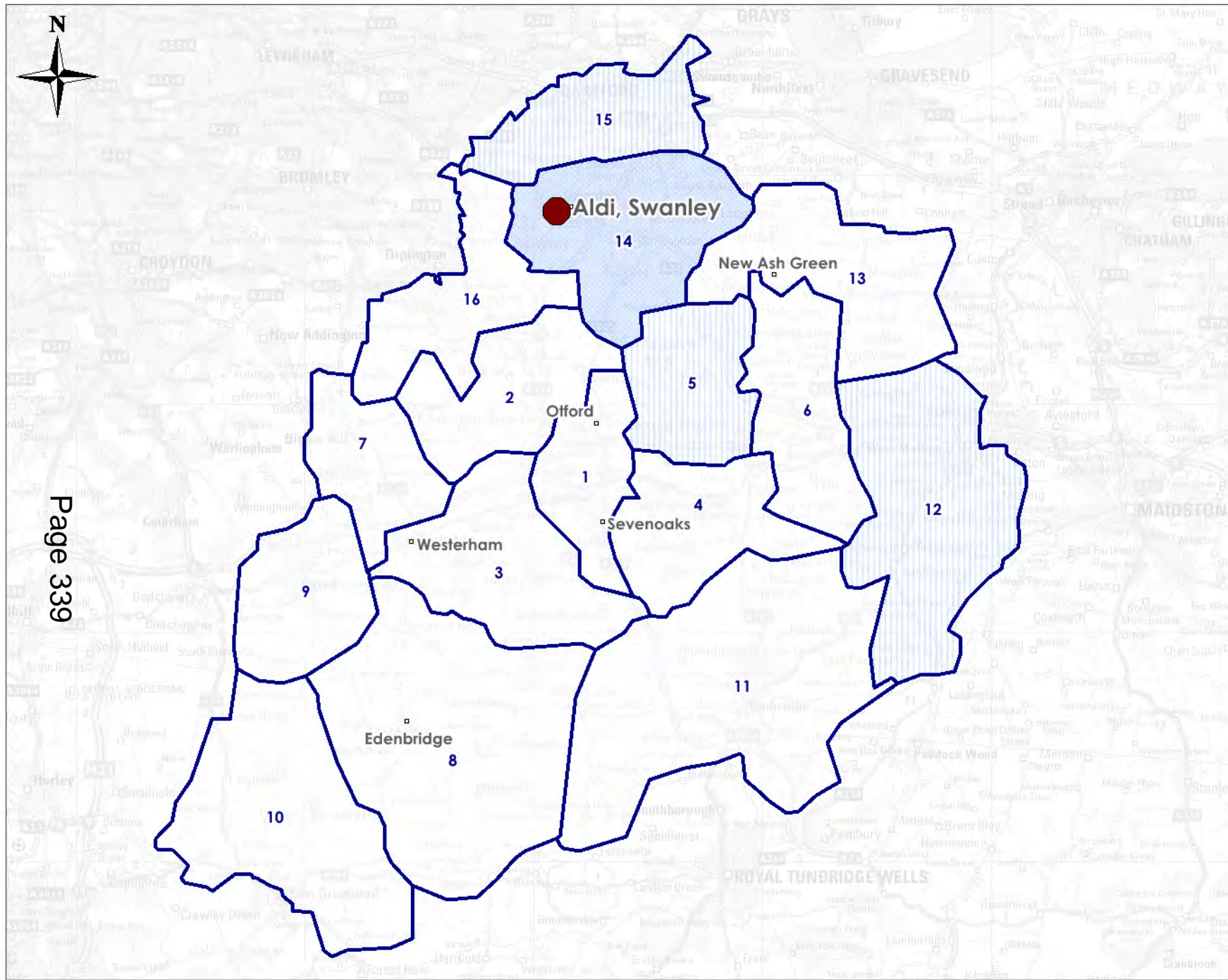
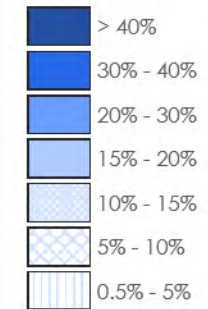
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### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



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# Aldi, Swanley convenience goods market share



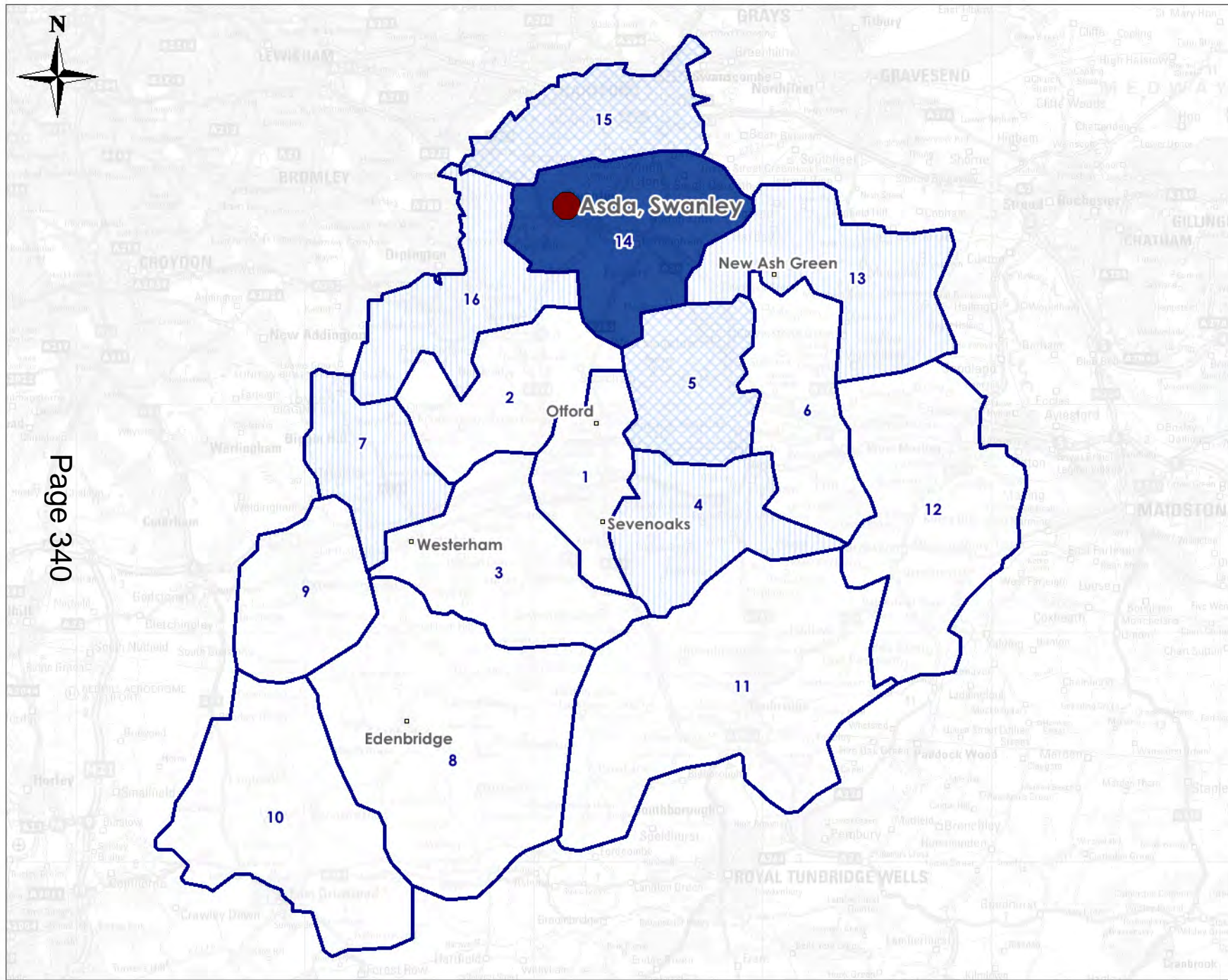
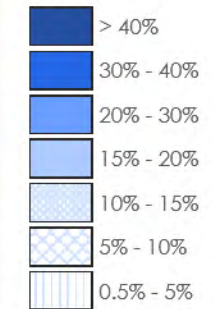


### Sevenoaks 2016 Retail Study

Agenda Item 9

#### Key

Convenience goods market share



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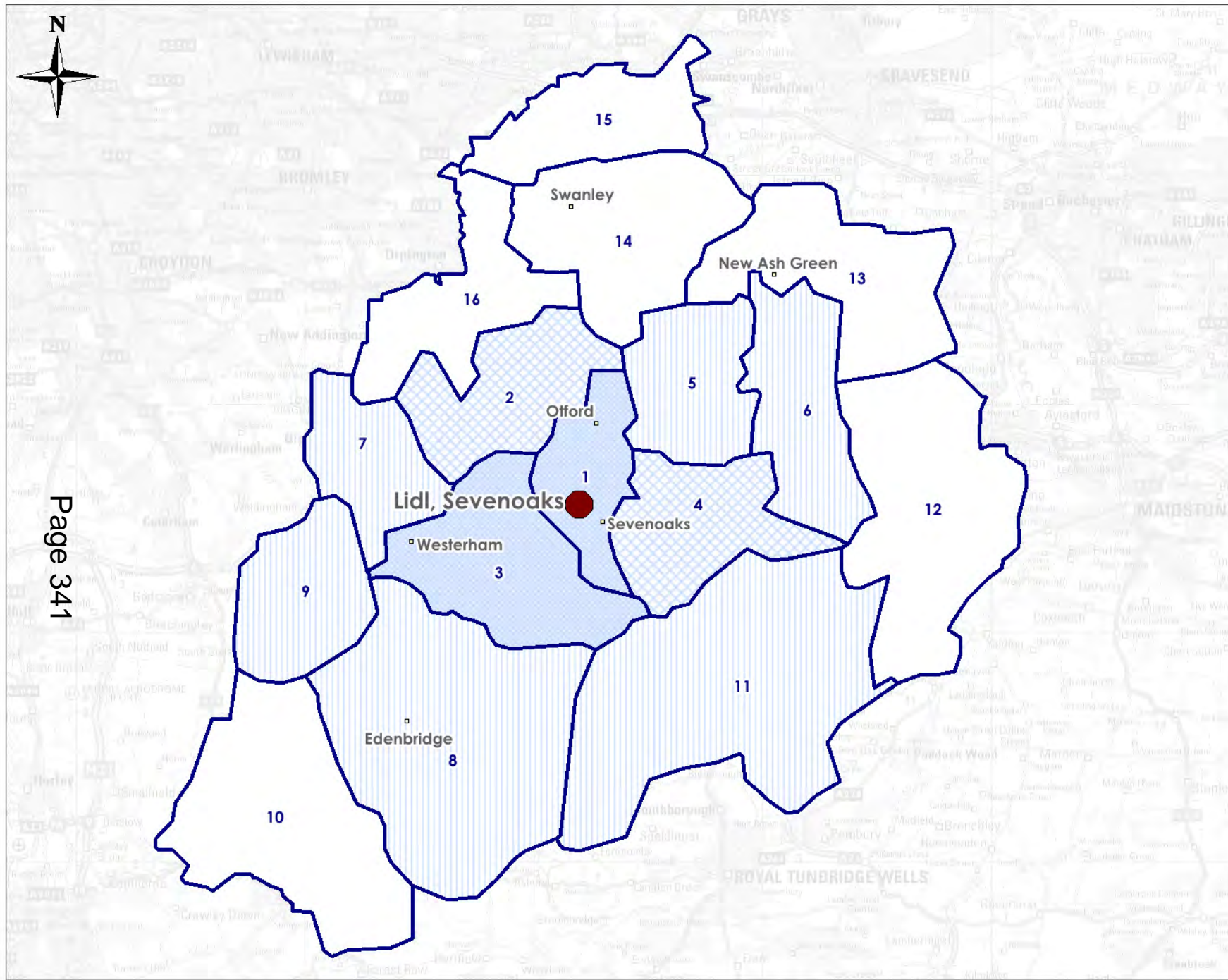
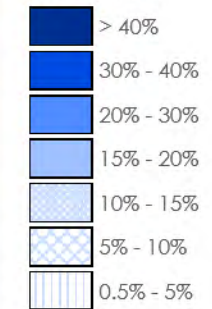
# Asda, Swanley convenience goods market share



### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



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# Lidl, Sevenoaks convenience goods market share

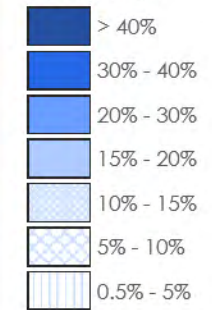




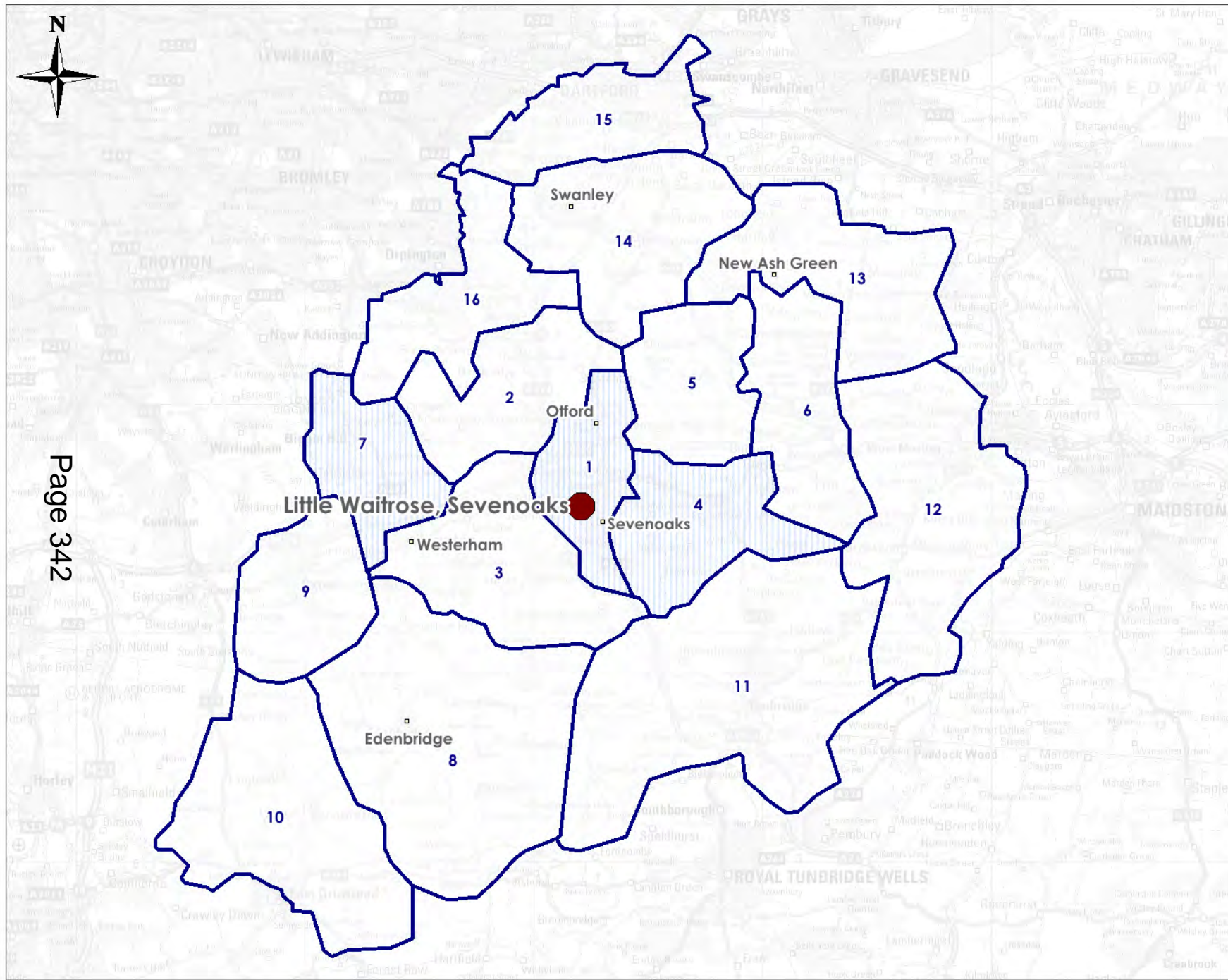
### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



Agenda Item 9



# Little Waitrose, Sevenoaks convenience goods market share

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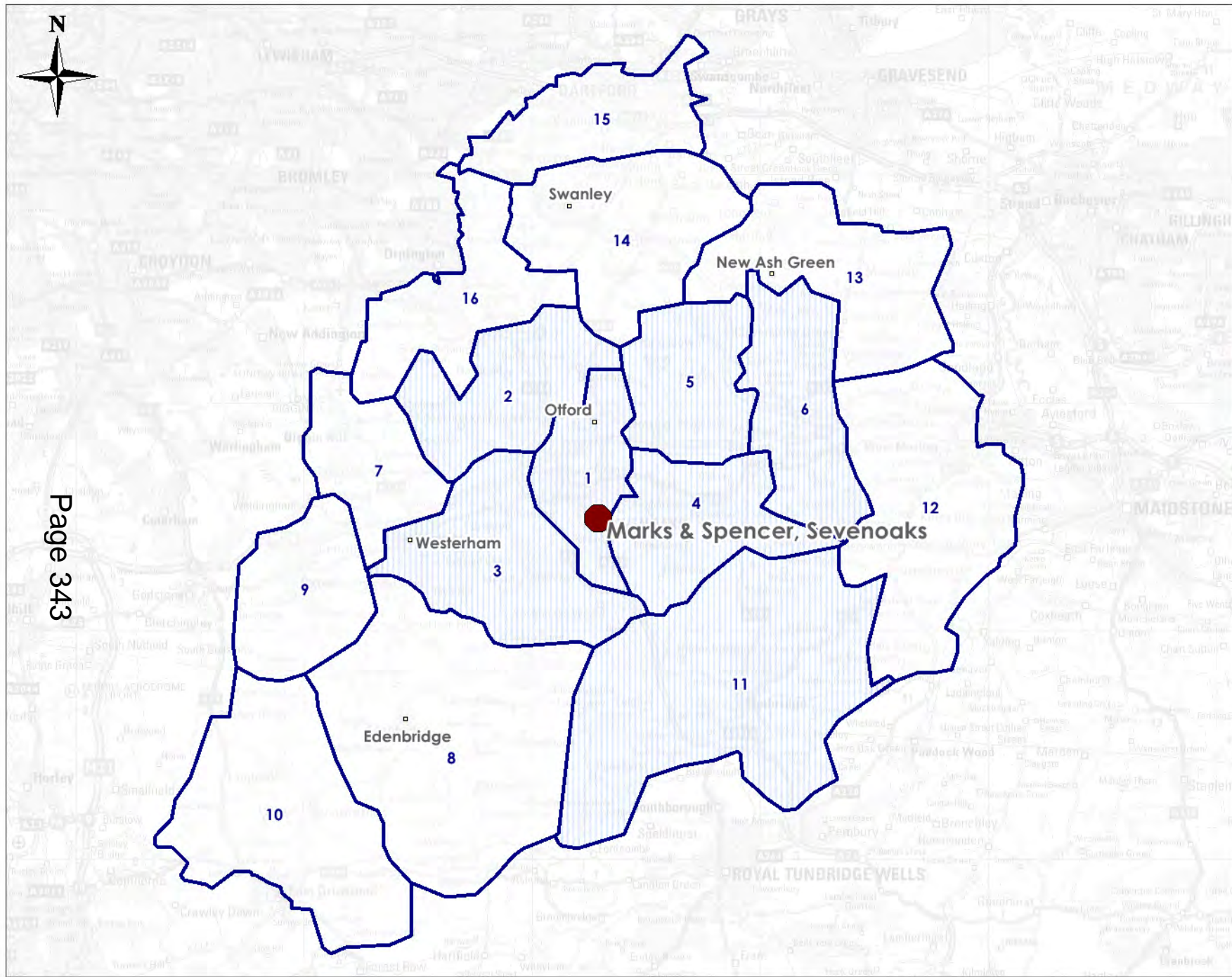
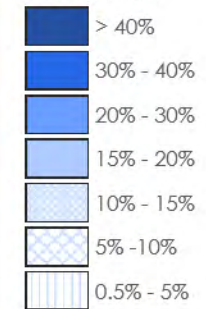




### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



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# Marks & Spencer, Sevenoaks convenience goods market share



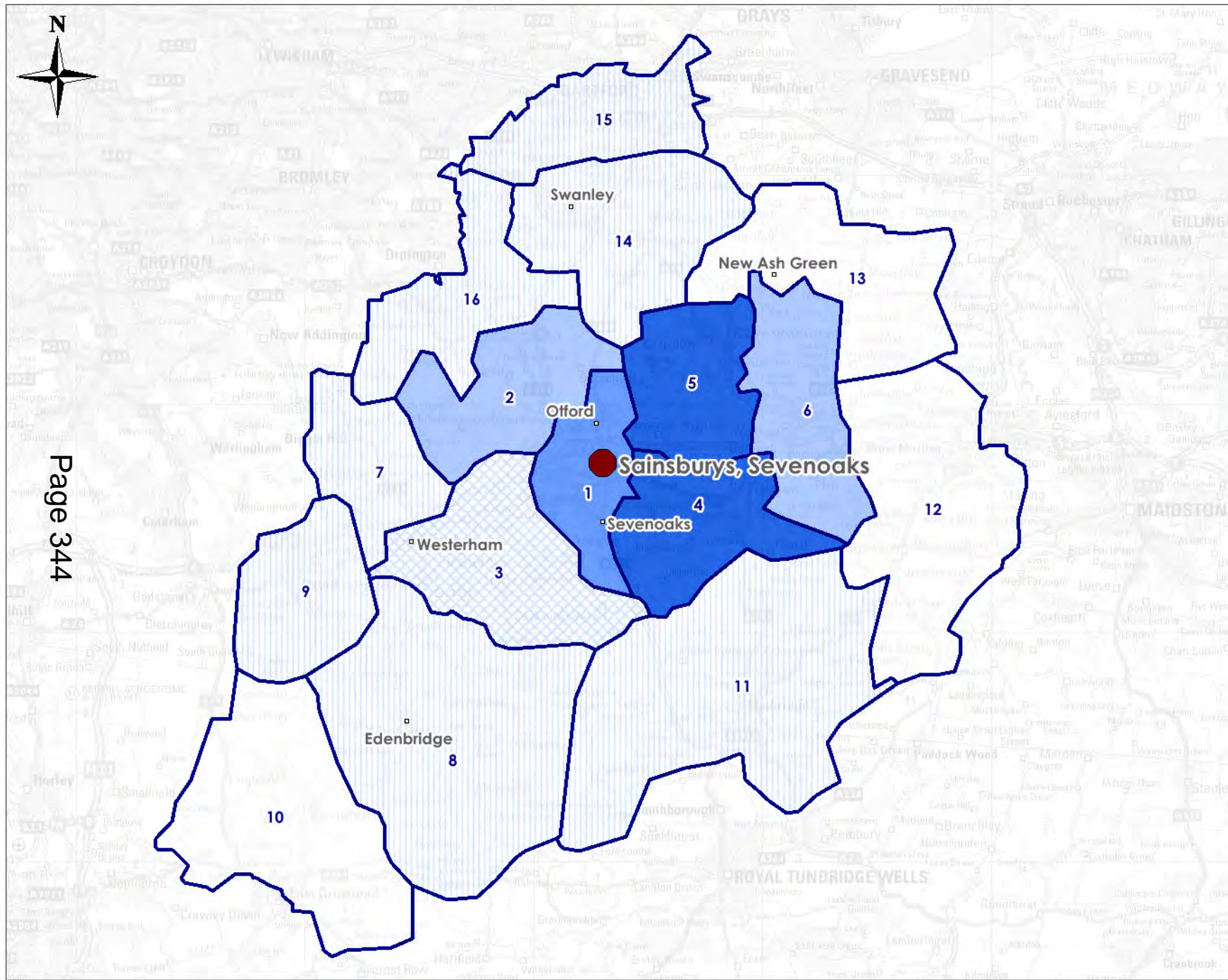
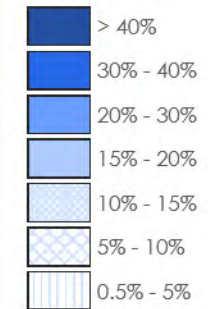


### Sevenoaks 2016 Retail Study

Agenda Item 9

#### Key

Convenience goods market share



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# Sainsburys, Sevenoaks convenience goods market share

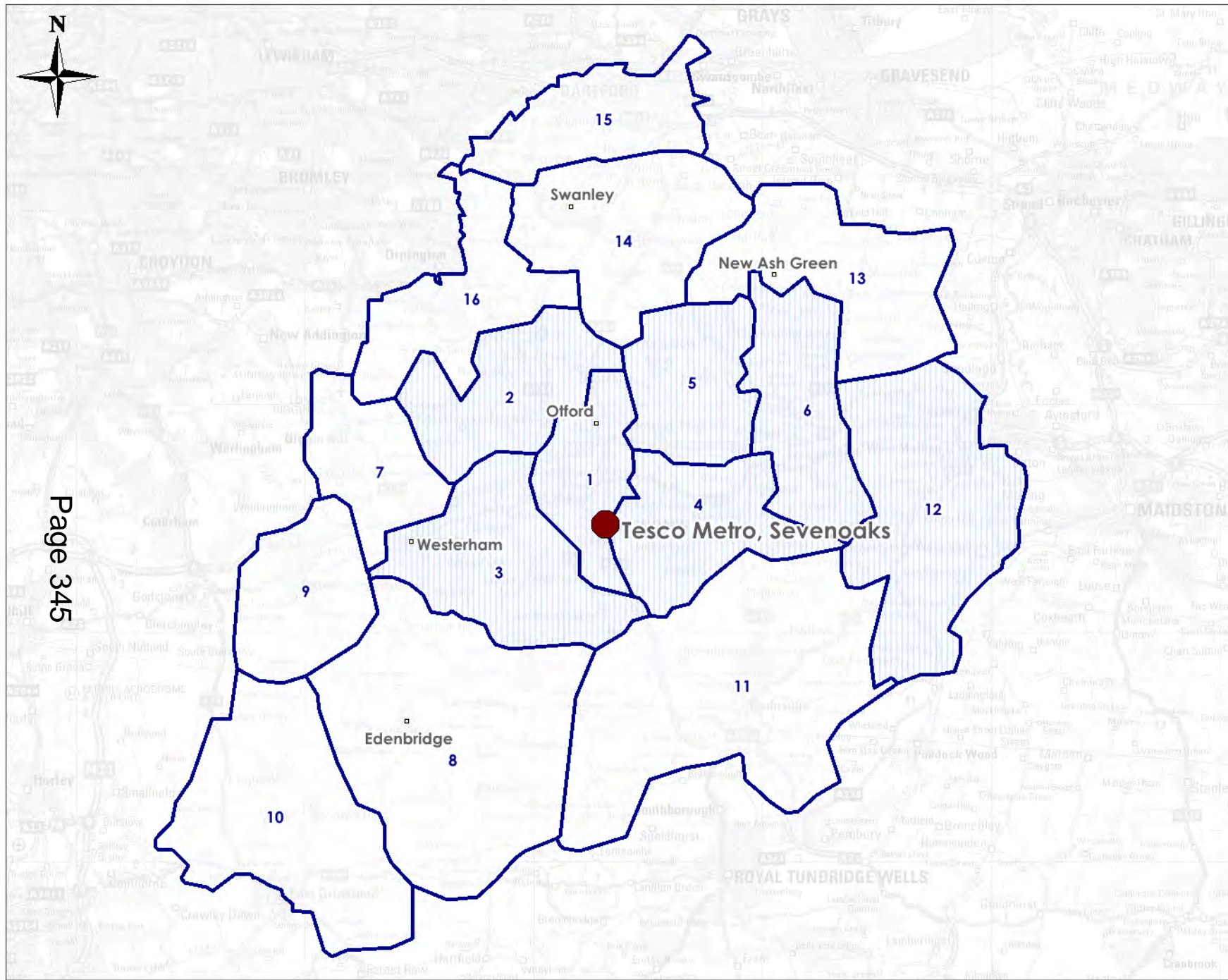
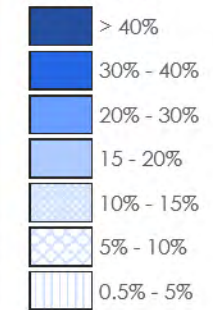




### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



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# Tesco Metro, Sevenoaks convenience goods market share



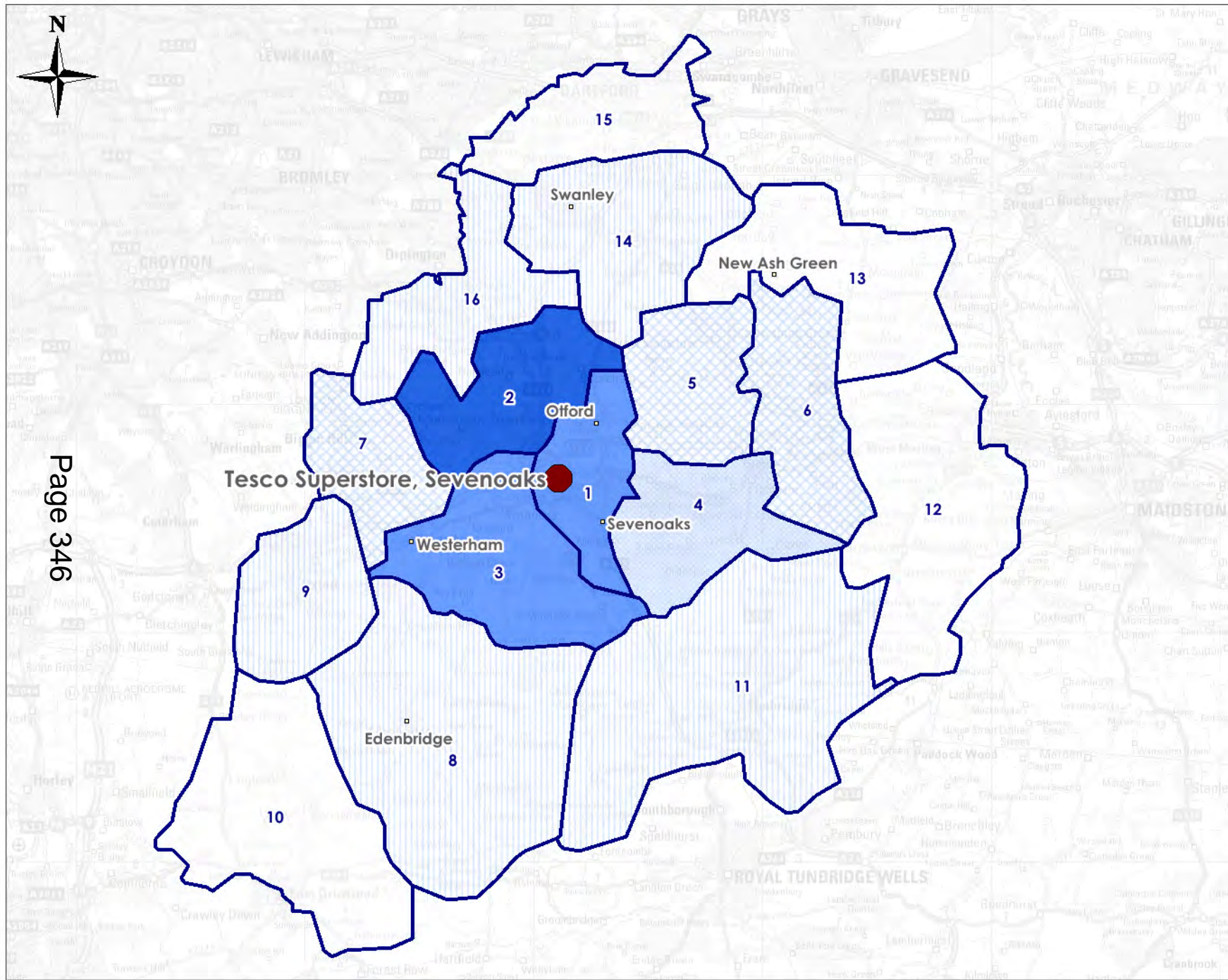
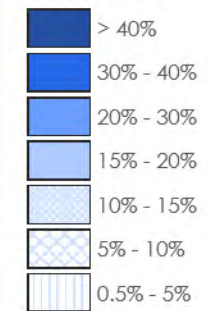


### Sevenoaks 2016 Retail Study

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#### Key

Convenience goods market share



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# Tesco Superstore, Sevenoaks convenience goods market share

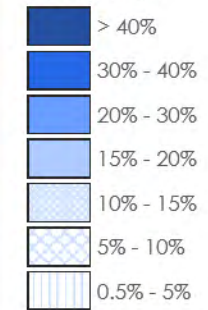




### Sevenoaks 2016 Retail Study

#### Key

Convenience goods market share



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# Waitrose, Edenbridge convenience goods market share



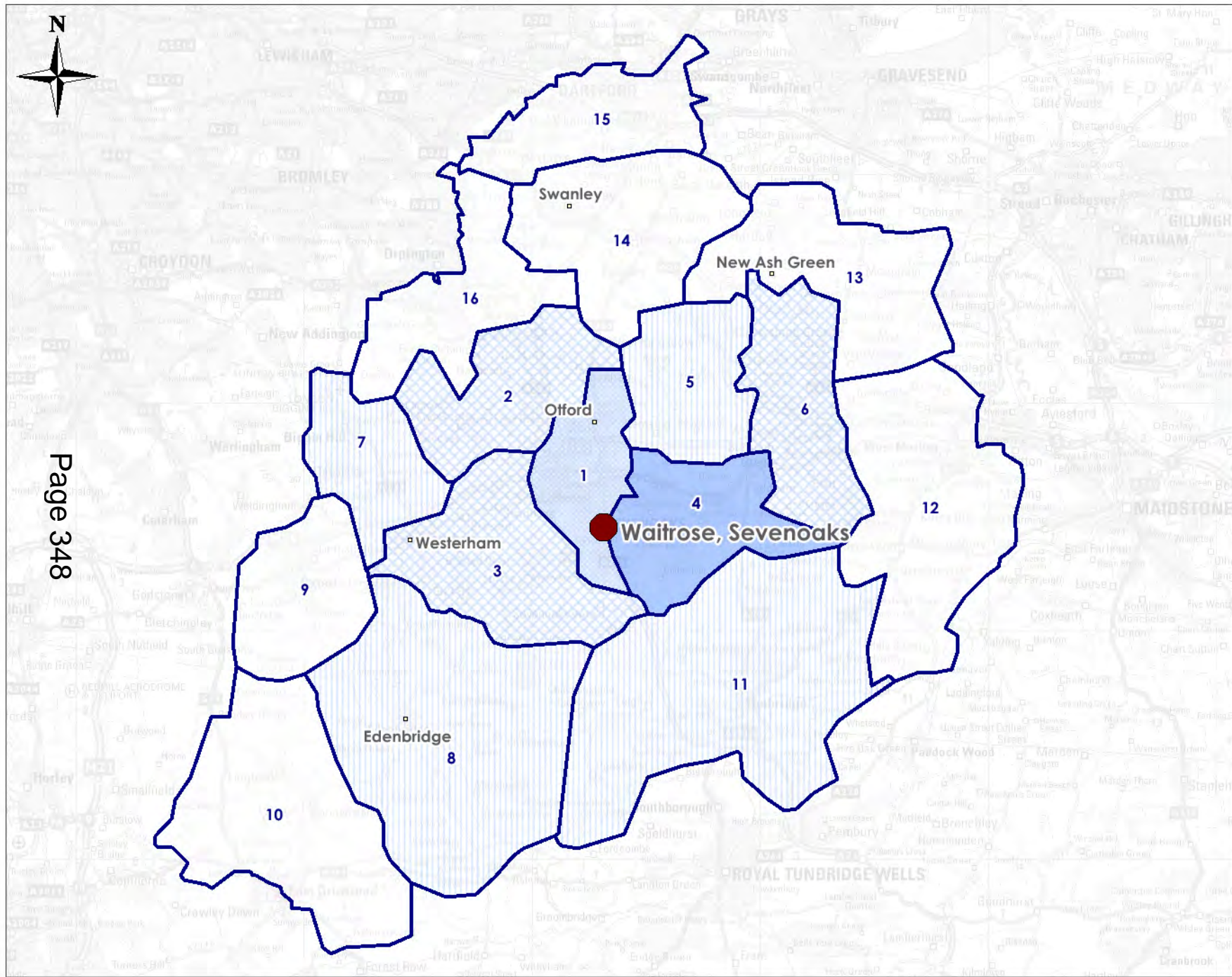
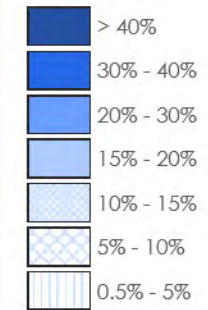


### Sevenoaks 2016 Retail Study

Agenda Item 9

#### Key

Convenience goods market share



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# Waitrose, Sevenoaks convenience goods market share

# SERVICES VILLAGES MATRIX

Sevenoaks Service Villages Facilities Audit

Centre name	Description	Nearest town/district centre	Total number of units	National retailers	Convenience				Comparison			Services							Total Facilities	
					Supermarket	Small convenience store	Newsagent/off licence	Other convenience (list)	Post Office	Pharmacy	ATM	Laundrette/Dry Cleaners	Café	Public House	Take away	Hairdressers/Beauty Salon	Doctors Surgery	Library		
Brasted	Brasted is a linear village located on the A25 within close proximity to the M25. The centre benefits from well maintained shop fronts and wide pavements. The centre benefits from on street bay parking and good quality public realm through the provision of a good number of trees and planting, as well as coordinated street furniture. The centre is anchored by a village store in addition to a number of antique shops.	Westerham (1.64 miles)	15	-	-	✓	-	-	-	-	-	-	-	✓	-	-	✓	-	-	3
Crockenhill	Crockenhill is a small village to the south west of Swanley. The main shopping parade is centred upon Green Court Road. A number of the units are vacant, although the centre has retained its post office. The centre has limited parking due to the double yellow lines that surround the main shopping parade.	Swanley (1.3 miles)	7	-	-	✓	-	-	✓	-	-	-	-	✓	✓	-	-	-	-	4
Eynsford	Eynsford is a small linear settlement. The centre has a limited retail offer. The retail offer is centred upon the High Street. There is limited parking on the High Street.	Swanley (3.5 miles)	6	-	-	-	✓	Butcher	-	-	-	-	-	✓	-	-	-	-	-	2
Farningham	Farningham is a small linear settlement with its retail offer centred upon the High Street. The centre has a limited range of retail and has limited bay parking.	Swanley (2.9 miles)	5	-	-	✓	-	Butcher	-	-	-	-	-	✓	✓	-	-	-	-	3
Halstead	The retail offer in Halstead is centred upon Knockholt Road, although the offer is somewhat limited. The centre has retained a post office. Parking is limited within this centre due to the linear nature of the settlement constrained by dwellings either side of the road.	Otford (4 miles)	4	-	-	✓	-	-	✓	-	-	-	✓	✓	-	-	-	-	-	4
Hartley	The retail offer in Hartley is relatively disjointed along Ash Road. In addition to the services listed within this matrix, there are also two garages.	West Kingsdown (4.9 miles)	6	-	-	✓	-	-	✓	-	-	-	-	✓	-	✓	-	-	-	4
Hextable	The retail offer in Hextable is centred upon the upper Main Road. The retail offer within this centre is limited, as is convenient parking	Swanley (1.3 miles)	5	-	-	✓	-	-	✓	✓	-	-	-	-	-	✓	-	-	-	4
Horton Kirby	The retail offer in Horton Kirby is very limited. The centre does not have a village store or post office. Parking is also limited.	Swanley (4.2 miles)	3	-	-	-	-	-	-	-	-	-	-	✓	-	-	-	-	-	1
Kemsing	Kemsing is an attractive linear settlement with limited parking and footpaths due to the High Street running along the main road. The centre has a limited retail offer focused mainly on convenience goods.	Otford (2.2 miles)	7	✓	-	✓	✓	-	✓	-	-	-	-	-	✓	✓	-	-	-	5
Knockholt Pound	The limited retail offer within Knockholt Pound is centred upon the Main Road. Due to the nature of the settlement parking is limited, however Main Road borders attractive playing fields and the associated Knockholt Village Centre	Sevenoaks (6.1 miles)	3	-	-	✓	-	-	-	-	-	-	-	✓	-	-	-	-	-	2



Centre name	Description	Nearest town/district centre	Total number of units	National retailers	Convenience				Comparison			Services							Total Facilities	
					Supermarket	Small convenience store	Newsagent/off licence	Other convenience (list)	Post Office	Pharmacy	ATM	Laundrette/Dry Cleaners	Café	Public House	Take away	Hairdressers/Beauty Salon	Doctors Surgery	Library		
Leigh	Leigh is a small, attractive village, however it does not have any retail offer, possibly due to the size of the settlement.	Tonbridge (4 miles)	0	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
Seal	Seal is an attractive village with the retail focus on High Street. There is limited parking within the centre due to the High Street having double yellow lines throughout.	Sevenoaks (2.2 miles)	11	-	-	-	✓	Butcher	-	-	-	-	-	-	✓	-	-	-	-	2
Sevenoaks Weald	Sevenoaks Weald is an attractive settlement, however it lacks a clear village centre and retail focus. There is a limited retail offer within the village.	Sevenoaks (2.5 miles)	4	-	-	✓	-	-	✓	-	-	-	-	-	✓	-	-	-	-	3
Shoreham	Shoreham is an attractive linear village centred upon the High Street. The retail offer is limited to a village store and public houses. Parking within the centre is limited due to the nature of the High Street.	Otford (2.3 miles)	3	-	-	-	-	-	-	-	-	-	✓	✓	-	-	-	-	-	2
South Darent	South Darent is lacking a clear village centre, with the retail offer focused upon Holmesdale Road. In addition to the village store there are a number of public houses.	Swanley (3.6 miles)	4	✓	-	✓	-	General Store	✓	-	-	-	-	-	-	-	-	-	-	2
Sundridge	Sundridge is an attractive village with the retail offer centred upon the A25, with the flood plain of the River Darent opposite. There is limited parking within the centre, however there are a limited number of designated spaces outside of the Premier store.	Westerham (2.6 miles)	7	✓	-	✓	-	-	✓	-	-	-	-	✓	-	✓	✓	-	-	5
West Kingsdown	The retail offer in West Kingsdown is dispersed in nature, but primarily focused along the length of London Road.	New Ash Green (3.5 miles)	9	✓	-	✓	✓	-	-	✓	-	✓	-	✓	✓	-	-	-	-	6

# COMPARISON GOODS MODELLING

Agenda Item 9

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 1: Survey area population projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Total
<b>2014</b>	32,308	5,285	8,535	6,239	10,000	9,239	14,530	13,809	15,576	27,803	49,673	30,846	26,422	32,635	65,916	50,844	<b>399,660</b>
<b>2016</b>	32,804	5,385	8,705	6,360	10,127	9,391	14,877	14,069	15,739	28,169	50,583	31,498	26,790	33,159	67,447	51,820	<b>406,923</b>
<b>2021</b>	34,268	5,623	9,119	6,647	10,553	9,805	15,706	14,760	16,280	29,355	52,847	33,290	27,776	34,503	71,194	54,525	<b>426,251</b>
<b>2026</b>	35,686	5,840	9,518	6,944	10,932	10,212	16,540	15,454	16,844	30,555	54,935	35,021	28,816	35,857	74,707	57,003	<b>444,864</b>
<b>2031</b>	37,077	6,022	9,897	7,232	11,249	10,506	17,291	16,012	17,418	31,591	56,817	36,629	29,696	37,081	78,046	59,322	<b>461,886</b>
<b>2035</b>	38,018	6,153	10,167	7,441	11,487	10,715	17,822	16,410	17,874	32,324	58,285	37,753	30,357	38,005	80,603	61,028	<b>474,442</b>
<b>Change 2016-35</b>	5,214	768	1,462	1,081	1,360	1,324	2,945	2,341	2,135	4,155	7,702	6,255	3,567	4,846	13,156	9,208	<b>67,519</b>

Source: Experian Micromarketer, accessed June 2016. Population projections are 2014-based.

Table 1a: Survey area postal sectors

Zone number	Postal sectors	Zone name
Zone 1	TN 13 1/2/3, TN14 5	Sevenoaks
Zone 2	TN14 7	Shoreham
Zone 3	TN14 6, TN16 1	Westerham
Zone 4	TN15 0/9	Igtham
Zone 5	TN15 6	Sevenoaks
Zone 6	TN15 7/8	Wrotham/Borough Green
Zone 7	TN16 2/3	Westerham
Zone 8	TN8 5/6/7	Edenbridge
Zone 9	RH8 0/9	Oxted
Zone 10	RH7 6, RH19 2/3	Lingfield/East Grinstead
Zone 11	TN9 1/2, TN10 3/4, TN11 0/8/9	Tonbridge and Malling
Zone 12	ME18 5, ME19 4/5/6, TN12 5	Maidstone/West Malling/Tonbridge
Zone 13	DA3 7/8, DA13 0	New Ash Green/Meopham
Zone 14	BR8 7/8, DA4 0/9	Swanley/Dartford
Zone 15	DA1 1/2/3, DA2 6/7, DA5 2, DA14 5	Dartford/Bexley/Sidcup
Zone 16	BR5 3/4, BR6 6/7/9	Orpington

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 2: Survey area comparison goods retail expenditure forecasts (per capita, 2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16
2014	4,268	4,940	4,339	4,799	4,387	4,258	4,489	4,105	4,360	4,173	3,691	4,053	4,448	3,534	3,421	3,692
2016	4,692	5,430	4,769	5,275	4,823	4,681	4,935	4,513	4,793	4,587	4,057	4,456	4,890	3,885	3,760	4,059
<b>2016 Minus SFT at 12.4%</b>	<b>4,110</b>	<b>4,757</b>	<b>4,178</b>	<b>4,621</b>	<b>4,225</b>	<b>4,100</b>	<b>4,323</b>	<b>3,953</b>	<b>4,198</b>	<b>4,019</b>	<b>3,554</b>	<b>3,903</b>	<b>4,283</b>	<b>3,404</b>	<b>3,294</b>	<b>3,556</b>
2020	5,404	6,255	5,493	6,076	5,555	5,391	5,684	5,198	5,520	5,284	4,673	5,132	5,632	4,475	4,331	4,675
<b>2020 Minus SFT at 14.9%</b>	<b>4,599</b>	<b>5,323</b>	<b>4,675</b>	<b>5,171</b>	<b>4,727</b>	<b>4,588</b>	<b>4,837</b>	<b>4,423</b>	<b>4,698</b>	<b>4,496</b>	<b>3,977</b>	<b>4,367</b>	<b>4,792</b>	<b>3,808</b>	<b>3,686</b>	<b>3,978</b>
2025	6,277	7,265	6,380	7,057	6,452	6,262	6,602	6,037	6,412	6,137	5,428	5,961	6,541	5,198	5,030	5,430
<b>2025 Minus SFT at 15.0%</b>	<b>5,336</b>	<b>6,175</b>	<b>5,423</b>	<b>5,999</b>	<b>5,484</b>	<b>5,322</b>	<b>5,611</b>	<b>5,132</b>	<b>5,450</b>	<b>5,216</b>	<b>4,614</b>	<b>5,067</b>	<b>5,560</b>	<b>4,418</b>	<b>4,276</b>	<b>4,616</b>
2030	7,348	8,504	7,469	8,261	7,552	7,330	7,728	7,067	7,505	7,184	6,354	6,978	7,657	6,085	5,889	6,356
<b>2030 Minus SFT at 14.7%</b>	<b>6,268</b>	<b>7,254</b>	<b>6,371</b>	<b>7,047</b>	<b>6,442</b>	<b>6,252</b>	<b>6,592</b>	<b>6,028</b>	<b>6,402</b>	<b>6,128</b>	<b>5,420</b>	<b>5,952</b>	<b>6,531</b>	<b>5,190</b>	<b>5,023</b>	<b>5,422</b>
2035	8,601	9,954	8,743	9,670	8,840	8,580	9,046	8,273	8,786	8,409	7,437	8,168	8,963	7,122	6,893	7,440
<b>2035 Minus SFT at 14.3%</b>	<b>7,371</b>	<b>8,531</b>	<b>7,493</b>	<b>8,287</b>	<b>7,576</b>	<b>7,353</b>	<b>7,752</b>	<b>7,090</b>	<b>7,529</b>	<b>7,207</b>	<b>6,374</b>	<b>7,000</b>	<b>7,681</b>	<b>6,104</b>	<b>5,907</b>	<b>6,376</b>

Source: Experian Micromarketer, October 2015. Growth rates and allowance for SFT are derived from Experian Retail Planner 13, Figure 1a (for growth rates) / Figure 5 (for SFT)

Table 3: Survey area retail expenditure forecasts (2014 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)
<b>2016</b>	134.8	25.6	36.4	29.4	42.8	38.5	64.3	55.6	66.1	113.2	179.8	122.9	114.7	112.9	222.2	184.3	1,543.5
<b>2020</b>	157.6	29.9	42.6	34.4	49.9	45.0	76.0	65.3	76.5	132.0	210.2	145.4	133.1	131.4	262.4	216.9	1,808.5
<b>2025</b>	190.4	36.1	51.6	41.7	60.0	54.4	92.8	79.3	91.8	159.4	253.4	177.4	160.2	158.4	319.4	263.1	2,189.4
<b>2030</b>	232.4	43.7	63.1	51.0	72.5	65.7	114.0	96.5	111.5	193.6	307.9	218.0	194.0	192.5	392.0	321.6	2,669.9
<b>2035</b>	280.2	52.5	76.2	61.7	87.0	78.8	138.2	116.3	134.6	233.0	371.5	264.3	233.2	232.0	476.1	389.1	3,224.6
<b>Change 2016-35</b>	<b>145.4</b>	<b>26.9</b>	<b>39.8</b>	<b>32.3</b>	<b>44.2</b>	<b>40.3</b>	<b>73.9</b>	<b>60.7</b>	<b>68.5</b>	<b>119.8</b>	<b>191.7</b>	<b>141.3</b>	<b>118.4</b>	<b>119.1</b>	<b>254.0</b>	<b>204.9</b>	<b>1,681.2</b>

Source: Tables 1 & 2

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 4: Comparison goods allocation 2016 (% market share)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)	Zone 13 (%)	Zone 14 (%)	Zone 15 (%)	Zone 16 (%)
<b>Comparison goods floorspace in Sevenoaks District</b>																
<b>Sevenoaks</b>																
Sevenoaks Town Centre	38.9%	21.9%	25.2%	34.2%	18.2%	20.4%	3.8%	7.4%	2.2%	0.0%	4.5%	2.1%	1.0%	2.2%	1.2%	2.4%
Sevenoaks Retail Parks	13.5%	7.8%	8.5%	12.4%	11.0%	7.9%	4.2%	1.5%	2.1%	0.0%	0.5%	0.2%	0.1%	1.9%	0.1%	1.3%
Sainsbury's, Otford Road, Sevenoaks	4.8%	5.0%	0.7%	4.0%	7.1%	2.4%	0.0%	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	1.6%	0.0%	0.2%
Tesco Superstore, Aisher Way, Sevenoaks	5.2%	5.4%	2.8%	1.9%	1.8%	0.7%	0.8%	0.5%	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.4%
<b>Sub-total, Sevenoaks</b>	<b>62.4%</b>	<b>40.1%</b>	<b>37.2%</b>	<b>52.5%</b>	<b>38.0%</b>	<b>31.4%</b>	<b>8.7%</b>	<b>9.5%</b>	<b>4.4%</b>	<b>0.0%</b>	<b>6.4%</b>	<b>2.3%</b>	<b>1.1%</b>	<b>5.7%</b>	<b>1.2%</b>	<b>5.3%</b>
<b>Swanley</b>																
Swanley Town Centre	0.0%	0.1%	0.0%	0.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	0.9%	0.7%
Asda Swanley	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	3.6%	0.8%	1.3%
<b>Sub-total, Swanley</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>4.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>11.7%</b>	<b>1.8%</b>	<b>2.0%</b>
<b>Edenbridge</b>																
Edenbridge Town Centre	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	25.2%	0.4%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total Edenbridge</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>25.2%</b>	<b>0.4%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Otford</b>																
Otford town centre	2.1%	1.2%	0.9%	1.9%	0.5%	3.0%	0.3%	0.1%	1.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.8%
<b>Sub-total, Otford</b>	<b>2.1%</b>	<b>1.2%</b>	<b>0.9%</b>	<b>1.9%</b>	<b>0.5%</b>	<b>3.0%</b>	<b>0.3%</b>	<b>0.1%</b>	<b>1.2%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.8%</b>
<b>Westerham</b>																
Westerham Village Centre	0.0%	0.1%	7.6%	0.1%	0.0%	0.0%	2.1%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
<b>Sub-total, Westerham</b>	<b>0.0%</b>	<b>0.1%</b>	<b>7.6%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>2.1%</b>	<b>0.1%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>
<b>New Ash Green</b>																
New Ash Green Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
<b>Sub-total New Ash Green</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Sub-total for Sevenoaks District</b>	<b>64.5%</b>	<b>41.5%</b>	<b>46.4%</b>	<b>54.7%</b>	<b>43.0%</b>	<b>34.4%</b>	<b>11.2%</b>	<b>34.9%</b>	<b>6.6%</b>	<b>1.1%</b>	<b>6.4%</b>	<b>2.3%</b>	<b>2.3%</b>	<b>17.8%</b>	<b>3.0%</b>	<b>8.2%</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																
Oxted	0.3%	0.0%	7.1%	0.0%	0.0%	0.0%	4.4%	4.0%	42.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dartford	0.1%	0.4%	0.0%	0.9%	5.9%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	16.3%	25.9%	0.2%
Orpington	1.0%	13.3%	2.8%	0.7%	6.6%	0.1%	14.5%	0.1%	0.1%	0.0%	0.2%	0.2%	3.5%	2.6%	54.7%	
West Malling / Kings Hill	0.0%	0.0%	0.0%	0.0%	0.6%	0.8%	0.0%	0.0%	0.1%	0.0%	1.1%	11.1%	0.2%	0.0%	0.0%	0.0%
Tonbridge	0.5%	0.0%	1.2%	2.9%	0.9%	1.9%	0.0%	2.3%	0.2%	3.9%	27.3%	6.3%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total within survey area</b>	<b>2.0%</b>	<b>13.7%</b>	<b>11.1%</b>	<b>4.6%</b>	<b>13.9%</b>	<b>3.0%</b>	<b>19.0%</b>	<b>6.4%</b>	<b>43.2%</b>	<b>4.4%</b>	<b>28.4%</b>	<b>17.7%</b>	<b>5.8%</b>	<b>19.8%</b>	<b>28.5%</b>	<b>54.9%</b>
<b>Comparison goods floorspace outside survey area</b>																
Bluewater Shopping Centre	16.9%	28.7%	15.8%	18.8%	22.4%	32.5%	11.1%	4.2%	15.3%	1.7%	9.0%	23.7%	56.9%	46.3%	40.7%	13.3%
Crawley	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	6.4%	9.4%	20.9%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Maidstone	0.9%	0.0%	0.1%	2.6%	2.5%	11.1%	0.0%	0.0%	0.1%	0.3%	5.2%	33.7%	1.7%	0.1%	0.0%	0.0%
Royal Tunbridge Wells	7.6%	1.3%	6.7%	10.6%	1.8%	3.5%	2.3%	36.5%	2.9%	9.1%	43.6%	7.0%	0.8%	0.2%	0.0%	0.3%
East Grinstead	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	6.1%	1.2%	55.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Lakeside	0.9%	1.0%	3.7%	1.8%	1.6%	1.4%	0.7%	2.5%	0.7%	0.0%	3.7%	2.5%	5.2%	2.9%	5.4%	0.7%
London (central)	2.6%	2.7%	1.6%	2.4%	1.6%	1.8%	4.5%	1.1%	4.0%	1.7%	1.7%	0.7%	0.5%	1.2%	1.3%	3.0%
Bromley	3.7%	6.3%	11.0%	0.6%	3.0%	1.0%	36.6%	0.5%	1.1%	0.1%	0.7%	0.0%	0.4%	2.5%	1.2%	13.9%
Redhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	9.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All other locations outside survey area	0.8%	3.1%	1.8%	1.4%	4.8%	6.0%	9.5%	1.3%	6.1%	4.4%	0.8%	11.9%	24.0%	7.3%	16.0%	4.7%
<b>Sub-total outside survey area</b>	<b>33.4%</b>	<b>43.1%</b>	<b>41.6%</b>	<b>38.2%</b>	<b>37.9%</b>	<b>57.3%</b>	<b>64.8%</b>	<b>58.7%</b>	<b>50.2%</b>	<b>93.6%</b>	<b>64.7%</b>	<b>79.6%</b>	<b>89.5%</b>	<b>60.5%</b>	<b>64.6%</b>	<b>36.0%</b>
Local / small shops in survey area	0.2%	1.7%	0.9%	2.5%	5.2%	5.2%	5.0%	0.0%	0.0%	0.9%	0.4%	0.4%	2.4%	1.8%	3.9%	0.9%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: composite analysis of NEMS household survey results, June 2016

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 5a: Comparison goods allocation 2016 - spend (£m, 2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total Available Spend - 2016</b>	<b>134.8</b>	<b>25.6</b>	<b>36.4</b>	<b>29.4</b>	<b>42.8</b>	<b>38.5</b>	<b>64.3</b>	<b>55.6</b>	<b>66.1</b>	<b>113.2</b>	<b>179.8</b>	<b>122.9</b>	<b>114.7</b>	<b>112.9</b>	<b>222.2</b>	<b>184.3</b>	<b>1,543.5</b>	<b>100.0%</b>
<b>Comparison goods floorspace in Sevenoaks District</b>																		
<b>Sevenoaks</b>																		
Sevenoaks Town Centre	52.5	5.6	9.2	10.0	7.8	7.9	2.4	4.1	1.4	0.0	8.1	2.6	1.2	2.5	2.6	4.4	122.3	7.9%
Sevenoaks Retail Parks	18.3	2.0	3.1	3.6	4.7	3.0	2.7	0.8	1.4	0.0	1.0	0.3	0.1	2.1	0.2	2.4	45.7	3.0%
Sainsbury's, Otford Road, Sevenoaks	6.5	1.3	0.3	1.2	3.0	0.9	0.0	0.1	0.0	0.0	1.2	0.0	0.0	1.9	0.0	0.4	16.7	1.1%
Tesco Superstore, Alisher Way, Sevenoaks	7.0	1.4	1.0	0.6	0.8	0.3	0.5	0.3	0.1	0.0	1.3	0.0	0.0	0.0	0.0	2.6	15.7	1.0%
<b>Sub-total, Sevenoaks</b>	<b>84.2</b>	<b>10.3</b>	<b>13.5</b>	<b>15.4</b>	<b>16.3</b>	<b>12.1</b>	<b>5.6</b>	<b>5.3</b>	<b>2.9</b>	<b>0.0</b>	<b>11.5</b>	<b>2.9</b>	<b>1.3</b>	<b>6.5</b>	<b>2.8</b>	<b>9.8</b>	<b>200.3</b>	<b>13.0%</b>
<b>Swanley</b>																		
Swanley Town Centre	0.0	0.0	0.0	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	2.1	1.3	13.3	7.9%
Asda Swanley	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	4.1	1.8	2.3	9.7	3.0%
<b>Sub-total, Swanley</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>1.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>13.2</b>	<b>3.9</b>	<b>3.7</b>	<b>23.1</b>	<b>1.1%</b>
<b>Edenbridge</b>																		
Edenbridge Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	14.0	0.3	1.2	0.0	0.0	0.0	0.0	0.0	0.0	15.7	1.0%
<b>Sub-total Edenbridge</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>14.0</b>	<b>0.3</b>	<b>1.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>15.7</b>	<b>1.0%</b>
<b>Otford</b>																		
Otford town centre	2.8	0.3	0.3	0.6	0.2	1.2	0.2	0.1	0.8	0.0	0.0	0.0	0.0	0.4	0.0	1.5	8.3	0.5%
<b>Sub-total, Otford</b>	<b>2.8</b>	<b>0.3</b>	<b>0.3</b>	<b>0.6</b>	<b>0.2</b>	<b>1.2</b>	<b>0.2</b>	<b>0.1</b>	<b>0.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>1.5</b>	<b>8.3</b>	<b>0.5%</b>
<b>Westerham</b>																		
Westerham Village Centre	0.0	0.0	2.8	0.0	0.0	0.0	1.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.3	4.9	0.3%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>2.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.4</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>4.9</b>	<b>0.3%</b>
<b>New Ash Green</b>																		
New Ash Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	1.2	0.1%
<b>Sub-total New Ash Green</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.2</b>	<b>0.1%</b>
<b>Sub-total for Sevenoaks District</b>	<b>87.0</b>	<b>10.6</b>	<b>16.9</b>	<b>16.1</b>	<b>18.4</b>	<b>13.3</b>	<b>7.2</b>	<b>19.4</b>	<b>4.4</b>	<b>1.2</b>	<b>11.5</b>	<b>2.9</b>	<b>2.7</b>	<b>20.1</b>	<b>6.7</b>	<b>15.2</b>	<b>253.5</b>	<b>16.4%</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																		
Oxted	0.4	0.0	2.6	0.0	0.0	0.0	2.8	2.3	28.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	37.0	2.4%
Dartford	0.2	0.1	0.0	0.3	2.5	0.1	0.1	0.0	0.0	0.0	0.0	0.0	6.2	18.4	57.4	0.3	85.4	5.5%
Oplington	1.4	3.4	1.0	0.2	2.8	0.1	9.3	0.0	0.1	0.0	0.0	0.3	0.2	4.0	5.9	100.8	129.5	8.4%
West Malling / Kings Hill	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.1	0.0	1.9	13.6	0.3	0.0	0.0	0.0	16.5	1.1%
Tonbridge	0.7	0.0	0.4	0.9	0.4	0.7	0.0	1.3	0.1	4.4	49.2	7.8	0.0	0.0	0.0	0.0	65.9	4.3%
<b>Sub-total within survey area</b>	<b>2.6</b>	<b>3.5</b>	<b>4.0</b>	<b>1.4</b>	<b>6.0</b>	<b>1.2</b>	<b>12.2</b>	<b>3.6</b>	<b>28.6</b>	<b>5.0</b>	<b>51.1</b>	<b>21.7</b>	<b>6.6</b>	<b>22.4</b>	<b>63.3</b>	<b>101.2</b>	<b>334.3</b>	<b>21.7%</b>
<b>Comparison goods floorspace outside survey area</b>																		
Bluewater Shopping Centre	22.8	7.4	5.8	5.5	9.6	12.5	7.1	2.3	10.1	1.9	16.1	29.1	65.3	52.3	90.3	24.4	362.5	23.5%
Crawley	0.0	0.0	0.3	0.0	0.0	0.0	0.0	3.5	6.2	23.6	0.0	0.1	0.0	0.0	0.0	0.0	33.8	2.2%
Maldstone	1.2	0.0	0.0	0.8	1.1	4.3	0.0	0.1	0.3	9.4	41.4	2.0	0.2	0.0	0.0	0.0	60.6	3.9%
Royal Tunbridge Wells	10.3	0.3	2.4	3.1	0.8	1.4	1.5	20.3	1.9	10.3	78.4	8.6	0.9	0.3	0.0	0.6	141.1	9.1%
East Grinstead	0.0	0.0	0.0	0.0	0.1	0.0	0.0	3.4	0.8	62.7	0.2	0.1	0.0	0.0	0.0	0.0	67.2	4.4%
Lakeside	1.2	0.3	1.4	0.5	0.7	0.5	0.5	1.4	0.4	0.0	6.6	3.1	6.0	3.3	12.1	1.4	39.2	2.5%
London (central)	3.5	0.7	0.6	0.7	0.7	0.7	2.9	0.6	2.7	1.9	3.0	0.8	0.5	1.3	2.9	5.6	29.2	1.9%
Bromley	5.0	1.6	4.0	0.2	1.3	0.4	23.5	0.3	0.7	0.1	1.2	0.0	0.5	2.8	2.6	25.6	69.9	4.5%
Redhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	6.4	0.4%
All other locations outside survey area	1.0	0.8	0.7	0.4	2.1	2.3	6.1	0.7	4.1	5.0	1.5	14.6	27.6	8.2	35.5	8.6	119.3	7.7%
<b>Sub-total outside survey area</b>	<b>45.0</b>	<b>11.0</b>	<b>15.1</b>	<b>11.2</b>	<b>16.2</b>	<b>22.1</b>	<b>41.7</b>	<b>32.6</b>	<b>33.1</b>	<b>106.0</b>	<b>116.4</b>	<b>97.9</b>	<b>102.7</b>	<b>68.3</b>	<b>143.5</b>	<b>66.3</b>	<b>929.2</b>	<b>60.2%</b>
Local / small shops in survey area	0.3	0.4	0.3	0.7	2.2	2.0	3.2	0.0	0.0	1.0	0.7	0.5	2.7	2.1	8.7	1.6	26.5	1.7%
<b>Total</b>	<b>134.8</b>	<b>25.6</b>	<b>36.4</b>	<b>29.4</b>	<b>42.8</b>	<b>38.5</b>	<b>64.3</b>	<b>55.6</b>	<b>66.1</b>	<b>113.2</b>	<b>179.8</b>	<b>122.9</b>	<b>114.7</b>	<b>112.9</b>	<b>222.2</b>	<b>184.3</b>	<b>1,543.5</b>	<b>100.0%</b>

Source: Table 3, Table 4



Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 5b: Comparison goods allocation 2020 - spend (£m, 2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total Available Spend - 2020</b>	<b>157.6</b>	<b>29.9</b>	<b>42.6</b>	<b>34.4</b>	<b>49.9</b>	<b>45.0</b>	<b>76.0</b>	<b>65.3</b>	<b>76.5</b>	<b>132.0</b>	<b>210.2</b>	<b>145.4</b>	<b>133.1</b>	<b>131.4</b>	<b>262.4</b>	<b>216.9</b>	<b>1,808.5</b>	<b>100.0%</b>
<b>Comparison goods floorspace in Sevenoaks District</b>																		
<b>Sevenoaks</b>																		
Sevenoaks Town Centre	61.4	6.6	10.7	11.7	9.1	9.2	2.9	4.8	1.7	0.0	9.5	3.1	1.4	2.9	3.0	5.1	143.1	7.9%
Sevenoaks Retail Parks	21.3	2.3	3.6	4.3	5.5	3.5	3.2	1.0	1.6	0.0	1.1	0.3	0.1	2.5	0.2	2.8	53.4	3.0%
Sainsbury's, Otford Road, Sevenoaks	7.5	1.5	0.3	1.4	3.5	1.1	0.0	0.1	0.0	0.0	1.4	0.0	0.0	2.2	0.0	0.5	19.5	1.1%
Tesco Superstore, Alisher Way, Sevenoaks	8.1	1.6	1.2	0.7	0.9	0.3	0.6	0.3	0.1	0.0	1.5	0.0	0.0	0.0	0.0	3.0	18.3	1.0%
<b>Sub-total, Sevenoaks</b>	<b>98.4</b>	<b>12.0</b>	<b>15.9</b>	<b>18.1</b>	<b>19.0</b>	<b>14.1</b>	<b>6.6</b>	<b>6.2</b>	<b>3.3</b>	<b>0.0</b>	<b>13.5</b>	<b>3.4</b>	<b>1.5</b>	<b>7.5</b>	<b>3.3</b>	<b>11.5</b>	<b>234.3</b>	<b>13.0%</b>
<b>Swanley</b>																		
Swanley Town Centre	0.0	0.0	0.0	0.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.7	2.5	1.6	15.5	7.9%
Asda Swanley	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	4.8	2.2	2.7	11.4	3.0%
<b>Sub-total, Swanley</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>2.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>15.4</b>	<b>4.6</b>	<b>4.3</b>	<b>27.0</b>	<b>1.1%</b>
<b>Edenbridge</b>																		
Edenbridge Town Centre	0.0	0.0	0.3	0.0	0.0	0.0	0.0	16.4	0.3	1.4	0.0	0.0	0.0	0.0	0.0	0.0	18.4	1.0%
<b>Sub-total Edenbridge</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>16.4</b>	<b>0.3</b>	<b>1.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>18.4</b>	<b>1.0%</b>
<b>Otford</b>																		
Otford town centre	3.2	0.4	0.4	0.7	0.2	1.4	0.2	0.1	0.9	0.0	0.0	0.0	0.0	0.4	0.0	1.8	9.7	0.5%
<b>Sub-total, Otford</b>	<b>3.2</b>	<b>0.4</b>	<b>0.4</b>	<b>0.7</b>	<b>0.2</b>	<b>1.4</b>	<b>0.2</b>	<b>0.1</b>	<b>0.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>1.8</b>	<b>9.7</b>	<b>0.5%</b>
<b>Westerham</b>																		
Westerham Village Centre	0.0	0.0	3.3	0.0	0.0	0.0	1.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.3	5.8	0.3%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.6</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>5.8</b>	<b>0.3%</b>
<b>New Ash Green</b>																		
New Ash Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	1.4	0.1%
<b>Sub-total New Ash Green</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.4</b>	<b>0.1%</b>
<b>Sub-total for Sevenoaks District</b>	<b>101.6</b>	<b>12.4</b>	<b>19.8</b>	<b>18.8</b>	<b>21.5</b>	<b>15.5</b>	<b>8.5</b>	<b>22.8</b>	<b>5.1</b>	<b>1.4</b>	<b>13.5</b>	<b>3.4</b>	<b>3.1</b>	<b>23.4</b>	<b>7.9</b>	<b>17.9</b>	<b>296.5</b>	<b>0.2</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																		
Oxted	0.4	0.0	3.0	0.0	0.0	0.0	3.4	2.6	32.8	0.7	0.0	0.0	0.0	0.0	0.0	0.0	42.9	2.4%
Dartford	0.2	0.1	0.0	0.3	2.9	0.1	0.1	0.0	0.0	0.0	0.0	7.1	21.4	67.8	0.4	100.4	5.6%	
Oplington	1.6	4.0	1.2	0.2	3.3	0.1	11.0	0.0	0.1	0.0	0.0	0.3	0.3	4.6	6.9	118.7	152.4	8.4%
West Malling / Kings Hill	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.0	0.1	0.0	2.3	16.1	0.3	0.0	0.0	0.0	19.4	1.1%
Tonbridge	0.8	0.0	0.5	1.0	0.4	0.9	0.0	1.5	0.1	5.1	57.5	9.2	0.0	0.0	0.0	0.0	77.1	4.3%
<b>Sub-total within survey area</b>	<b>3.1</b>	<b>4.1</b>	<b>4.7</b>	<b>1.6</b>	<b>6.9</b>	<b>1.4</b>	<b>14.4</b>	<b>4.2</b>	<b>33.1</b>	<b>5.8</b>	<b>59.7</b>	<b>25.7</b>	<b>7.7</b>	<b>26.0</b>	<b>74.8</b>	<b>119.1</b>	<b>392.3</b>	<b>21.7%</b>
<b>Comparison goods floorspace outside survey area</b>																		
Bluewater Shopping Centre	26.6	8.6	6.8	6.4	11.2	14.6	8.4	2.7	11.7	2.3	18.8	34.4	75.7	60.9	106.7	28.8	424.6	23.5%
Crawley	0.0	0.0	0.3	0.0	0.0	0.0	0.1	4.2	7.2	27.6	0.0	0.1	0.0	0.0	0.0	0.0	39.4	2.2%
Maldstone	1.4	0.0	0.0	0.9	1.2	5.0	0.0	0.0	0.1	0.4	11.0	48.9	2.3	0.2	0.0	0.0	71.4	3.9%
Royal Tunbridge Wells	12.0	0.4	2.9	3.6	0.9	1.6	1.8	23.9	2.2	12.0	91.7	10.2	1.0	0.3	0.0	0.7	165.1	9.1%
East Grinstead	0.0	0.0	0.0	0.0	0.1	0.0	0.0	4.0	0.9	73.1	0.2	0.1	0.0	0.0	0.0	0.0	78.3	4.3%
Lakeside	1.4	0.3	1.6	0.6	0.8	0.6	0.5	1.6	0.5	0.0	7.7	3.7	6.9	3.8	14.2	1.6	46.0	2.5%
London (central)	4.1	0.8	0.7	0.8	0.8	0.8	3.4	0.7	3.1	2.2	3.6	1.0	0.6	1.6	3.5	6.6	34.2	1.9%
Bromley	5.9	1.9	4.7	0.2	1.5	0.4	27.8	0.3	0.8	0.1	1.4	0.0	0.5	3.3	3.1	30.2	82.2	4.5%
Redhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	7.4	0.4%
All other locations outside survey area	1.2	0.9	0.8	0.5	2.4	2.7	7.2	0.9	4.7	5.8	1.7	17.3	32.0	9.6	42.0	10.2	139.9	7.7%
<b>Sub-total outside survey area</b>	<b>52.6</b>	<b>12.9</b>	<b>17.7</b>	<b>13.1</b>	<b>18.9</b>	<b>25.8</b>	<b>49.2</b>	<b>38.3</b>	<b>38.4</b>	<b>123.6</b>	<b>136.1</b>	<b>115.7</b>	<b>119.1</b>	<b>79.6</b>	<b>169.5</b>	<b>78.0</b>	<b>1,088.5</b>	<b>60.2%</b>
Local / small shops in survey area	0.3	0.5	0.4	0.8	2.6	2.4	3.8	0.0	0.0	1.1	0.8	0.5	3.2	2.4	10.2	1.9	31.1	1.7%
<b>Total</b>	<b>157.6</b>	<b>29.9</b>	<b>42.6</b>	<b>34.4</b>	<b>49.9</b>	<b>45.0</b>	<b>76.0</b>	<b>65.3</b>	<b>76.5</b>	<b>132.0</b>	<b>210.2</b>	<b>145.4</b>	<b>133.1</b>	<b>131.4</b>	<b>262.4</b>	<b>216.9</b>	<b>1,808.5</b>	<b>100.0%</b>

Source: Table 3, Table 4

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 5c: Comparison goods allocation 2025 - spend (£m, 2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total Available Spend - 2025</b>	<b>190.4</b>	<b>36.1</b>	<b>51.6</b>	<b>41.7</b>	<b>60.0</b>	<b>54.4</b>	<b>92.8</b>	<b>79.3</b>	<b>91.8</b>	<b>159.4</b>	<b>253.4</b>	<b>177.4</b>	<b>160.2</b>	<b>158.4</b>	<b>319.4</b>	<b>263.1</b>	<b>2,189.4</b>	<b>100.0%</b>
<b>Comparison goods floorspace in Sevenoaks District</b>																		
<b>Sevenoaks</b>																		
Sevenoaks Town Centre	74.1	7.9	13.0	14.2	10.9	11.1	3.5	5.9	2.0	0.0	11.5	3.8	1.7	3.5	3.7	6.2	173.0	7.9%
Sevenoaks Retail Parks	25.8	2.8	4.4	5.2	6.6	4.3	3.9	1.2	1.9	0.0	1.4	0.4	0.2	3.0	0.3	3.4	64.6	2.9%
Sainsbury's, Otford Road, Sevenoaks	9.1	1.8	0.4	1.7	4.2	1.3	0.0	0.1	0.0	0.0	1.7	0.0	0.0	2.6	0.0	0.6	23.5	1.1%
tesco Superstore, Aisher Way, Sevenoaks	9.8	1.9	1.4	0.8	1.1	0.4	0.7	0.4	0.1	0.0	1.8	0.0	0.0	0.0	0.0	3.7	22.2	1.0%
<b>Sub-total, Sevenoaks</b>	<b>118.9</b>	<b>14.4</b>	<b>19.2</b>	<b>21.9</b>	<b>22.8</b>	<b>17.1</b>	<b>8.1</b>	<b>7.5</b>	<b>4.0</b>	<b>0.0</b>	<b>16.3</b>	<b>4.2</b>	<b>1.8</b>	<b>9.1</b>	<b>4.0</b>	<b>13.9</b>	<b>283.2</b>	<b>12.9%</b>
<b>Swanley</b>																		
Swanley Town Centre	0.0	0.1	0.0	0.1	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.9	3.0	1.9	18.8	7.9%
Asda Swanley	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	5.7	2.6	3.3	13.8	2.9%
<b>Sub-total, Swanley</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>18.6</b>	<b>5.6</b>	<b>5.2</b>	<b>32.6</b>	<b>1.1%</b>
<b>Edenbridge</b>																		
Edenbridge Town Centre	0.0	0.0	0.3	0.0	0.0	0.0	0.0	20.0	0.4	1.7	0.0	0.0	0.0	0.0	0.0	0.0	22.4	1.0%
<b>Sub-total Edenbridge</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>20.0</b>	<b>0.4</b>	<b>1.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>22.4</b>	<b>1.0%</b>
<b>Otford</b>																		
Otford town centre	3.9	0.4	0.5	0.8	0.3	1.7	0.3	0.1	1.1	0.0	0.0	0.0	0.0	0.5	0.0	2.1	11.7	0.5%
<b>Sub-total, Otford</b>	<b>3.9</b>	<b>0.4</b>	<b>0.5</b>	<b>0.8</b>	<b>0.3</b>	<b>1.7</b>	<b>0.3</b>	<b>0.1</b>	<b>1.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>2.1</b>	<b>11.7</b>	<b>0.5%</b>
<b>Westerham</b>																		
Westerham Village Centre	0.0	0.0	3.9	0.0	0.0	0.0	2.0	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.4	7.0	0.3%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>2.0</b>	<b>0.1</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>7.0</b>	<b>0.3%</b>
<b>New Ash Green</b>																		
New Ash Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	1.7	0.1%
<b>Sub-total New Ash Green</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.7</b>	<b>0.1%</b>
<b>Sub-total for Sevenoaks District</b>	<b>122.8</b>	<b>15.0</b>	<b>23.9</b>	<b>22.8</b>	<b>25.8</b>	<b>18.7</b>	<b>10.4</b>	<b>27.7</b>	<b>6.1</b>	<b>1.7</b>	<b>16.3</b>	<b>4.2</b>	<b>3.7</b>	<b>28.2</b>	<b>9.6</b>	<b>21.7</b>	<b>358.5</b>	<b>0.2</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																		
Oxted	0.5	0.0	3.6	0.0	0.0	0.0	4.1	3.2	39.3	0.9	0.0	0.0	0.0	0.0	0.0	0.0	51.7	2.4%
Dartford	0.2	0.1	0.0	0.4	3.5	0.1	0.1	0.0	0.0	0.0	0.0	0.0	8.6	25.8	82.6	0.5	121.9	5.6%
Oplington	2.0	4.8	1.4	0.3	4.0	0.1	13.4	0.0	0.1	0.0	0.0	0.4	0.3	5.6	8.4	144.0	184.8	8.4%
West Malling / Kings Hill	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.0	0.1	0.0	2.7	19.7	0.4	0.0	0.0	0.0	23.7	1.1%
Tonbridge	1.0	0.0	0.6	1.2	0.5	1.1	0.0	1.8	0.2	6.2	69.3	11.3	0.0	0.0	0.0	0.0	93.2	4.3%
<b>Sub-total within survey area</b>	<b>3.7</b>	<b>4.9</b>	<b>5.7</b>	<b>1.9</b>	<b>8.3</b>	<b>1.6</b>	<b>17.6</b>	<b>5.1</b>	<b>39.7</b>	<b>7.0</b>	<b>72.0</b>	<b>31.4</b>	<b>9.3</b>	<b>31.4</b>	<b>91.0</b>	<b>144.4</b>	<b>475.2</b>	<b>21.7%</b>
<b>Comparison goods floorspace outside survey area</b>																		
Bluewater Shopping Centre	32.2	10.4	8.2	7.8	13.4	17.6	10.3	3.3	14.1	2.7	22.7	42.0	91.1	73.4	129.9	34.9	514.0	23.5%
Crawley	0.0	0.0	0.4	0.0	0.0	0.0	0.1	5.0	8.6	33.3	0.0	0.1	0.0	0.0	0.0	0.0	47.6	2.2%
Maldstone	1.6	0.0	0.0	1.1	1.5	6.0	0.0	0.0	0.1	0.4	13.3	59.7	2.8	0.2	0.0	0.0	86.8	4.0%
Royal Tunbridge Wells	14.5	0.5	3.5	4.4	1.1	1.9	2.2	29.0	2.6	14.4	110.5	12.5	1.3	0.4	0.0	0.9	199.5	9.1%
East Grinstead	0.0	0.0	0.0	0.0	0.1	0.0	0.0	4.8	1.1	88.2	0.2	0.1	0.0	0.0	0.0	0.0	94.6	4.3%
Lakeide	1.7	0.4	1.9	0.7	1.0	0.8	0.7	2.0	0.6	0.0	9.3	4.5	8.3	4.6	17.3	2.0	55.7	2.5%
London (central)	5.0	1.0	0.8	1.0	1.0	1.0	4.2	0.9	3.7	2.7	4.3	1.2	0.7	1.9	4.2	8.0	41.4	1.9%
Bromley	7.1	2.3	5.7	0.2	1.8	0.5	34.0	0.4	1.0	0.1	1.7	0.0	0.7	3.9	3.8	36.6	99.8	4.6%
Redhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	8.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	8.9	0.4%
All other locations outside survey area	1.5	1.1	1.0	0.6	2.9	3.3	8.8	1.1	5.6	7.0	2.1	21.1	38.5	11.5	51.1	12.3	169.5	7.7%
<b>Sub-total outside survey area</b>	<b>63.5</b>	<b>15.5</b>	<b>21.5</b>	<b>15.9</b>	<b>22.7</b>	<b>31.2</b>	<b>60.1</b>	<b>46.5</b>	<b>46.0</b>	<b>149.2</b>	<b>164.1</b>	<b>141.3</b>	<b>143.4</b>	<b>95.9</b>	<b>206.4</b>	<b>94.6</b>	<b>1,318.0</b>	<b>60.2%</b>
Local / small shops in survey area	0.4	0.6	0.5	1.0	3.1	2.8	4.7	0.0	0.0	1.4	1.0	0.7	3.8	2.9	12.5	2.3	37.7	1.7%
<b>Total</b>	<b>190.4</b>	<b>36.1</b>	<b>51.6</b>	<b>41.7</b>	<b>60.0</b>	<b>54.4</b>	<b>92.8</b>	<b>79.3</b>	<b>91.8</b>	<b>159.4</b>	<b>253.4</b>	<b>177.4</b>	<b>160.2</b>	<b>158.4</b>	<b>319.4</b>	<b>263.1</b>	<b>2,189.4</b>	<b>100.0%</b>

Source: Table 3, Table 4

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 5d: Comparison goods allocation 2030 - spend (£m, 2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total Available Spend - 2030</b>	<b>232.4</b>	<b>43.7</b>	<b>63.1</b>	<b>51.0</b>	<b>72.5</b>	<b>65.7</b>	<b>114.0</b>	<b>96.5</b>	<b>111.5</b>	<b>193.6</b>	<b>307.9</b>	<b>218.0</b>	<b>194.0</b>	<b>192.5</b>	<b>392.0</b>	<b>321.6</b>	<b>2,669.9</b>	<b>100.0%</b>
<b>Comparison goods floorspace in Sevenoaks District</b>																		
<b>Sevenoaks</b>																		
Sevenoaks Town Centre	90.5	9.6	15.9	17.4	13.2	13.4	4.3	7.1	2.4	0.0	13.9	4.6	2.0	4.3	4.6	7.6	210.8	7.9%
Sevenoaks Retail Parks	31.5	3.4	5.4	6.3	8.0	5.2	4.8	1.4	2.3	0.0	1.7	0.5	0.2	3.6	0.3	4.2	78.7	2.9%
Sainsbury's, Otford Road, Sevenoaks	11.1	2.2	0.5	2.1	5.1	1.6	0.0	0.1	0.0	0.0	2.0	0.0	0.0	3.2	0.0	0.7	28.6	1.1%
Tesco Superstore, Aisher Way, Sevenoaks	12.0	2.4	1.8	1.0	1.3	0.5	0.9	0.5	0.2	0.0	2.2	0.0	0.0	0.0	0.0	4.5	27.0	1.0%
<b>Sub-total, Sevenoaks</b>	<b>145.1</b>	<b>17.5</b>	<b>23.5</b>	<b>26.8</b>	<b>27.6</b>	<b>20.6</b>	<b>9.9</b>	<b>9.2</b>	<b>4.9</b>	<b>0.0</b>	<b>19.8</b>	<b>5.1</b>	<b>2.2</b>	<b>11.1</b>	<b>4.9</b>	<b>17.0</b>	<b>345.0</b>	<b>12.9%</b>
<b>Swanley</b>																		
Swanley Town Centre	0.0	0.1	0.0	0.1	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.6	3.7	2.3	22.9	7.9%
Asda Swanley	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.0	3.2	4.1	16.8	2.9%
<b>Sub-total, Swanley</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>3.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.3</b>	<b>22.6</b>	<b>6.9</b>	<b>6.4</b>	<b>39.7</b>	<b>1.1%</b>
<b>Edenbridge</b>																		
Edenbridge Town Centre	0.0	0.0	0.4	0.0	0.0	0.0	0.0	24.3	0.5	2.1	0.0	0.0	0.0	0.0	0.0	0.0	27.2	1.0%
<b>Sub-total Edenbridge</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>24.3</b>	<b>0.5</b>	<b>2.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>27.2</b>	<b>1.0%</b>
<b>Otford</b>																		
Otford town centre	4.8	0.5	0.6	1.0	0.4	2.0	0.3	0.1	1.4	0.0	0.0	0.0	0.0	0.6	0.0	2.6	14.2	0.5%
<b>Sub-total, Otford</b>	<b>4.8</b>	<b>0.5</b>	<b>0.6</b>	<b>1.0</b>	<b>0.4</b>	<b>2.0</b>	<b>0.3</b>	<b>0.1</b>	<b>1.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.0</b>	<b>2.6</b>	<b>14.2</b>	<b>0.5%</b>
<b>Westerham</b>																		
Westerham Village Centre	0.0	0.0	4.8	0.1	0.0	0.0	2.4	0.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	8.6	0.3%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>4.8</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>2.4</b>	<b>0.1</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>8.6</b>	<b>0.3%</b>
<b>New Ash Green</b>																		
New Ash Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0	2.1	0.1%
<b>Sub-total New Ash Green</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>2.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>2.1</b>	<b>0.1%</b>
<b>Sub-total for Sevenoaks District</b>	<b>149.9</b>	<b>18.1</b>	<b>29.2</b>	<b>27.9</b>	<b>31.2</b>	<b>22.6</b>	<b>12.8</b>	<b>33.7</b>	<b>7.4</b>	<b>2.1</b>	<b>19.8</b>	<b>5.1</b>	<b>4.5</b>	<b>34.3</b>	<b>11.8</b>	<b>26.5</b>	<b>436.8</b>	<b>0.2</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																		
Oxted	0.6	0.0	4.4	0.0	0.0	0.0	5.0	3.9	47.8	1.1	0.0	0.0	0.0	0.0	0.0	0.0	62.9	2.4%
Dartford	0.3	0.2	0.0	0.5	4.2	0.1	0.1	0.0	0.0	0.0	0.0	10.4	31.3	101.3	0.6	149.0	5.6%	
Oplington	2.4	5.8	1.7	0.4	4.8	0.1	16.5	0.1	0.1	0.0	0.0	0.5	0.4	6.8	10.3	176.0	225.9	8.5%
West Malling / Kings Hill	0.0	0.0	0.0	0.0	0.4	0.5	0.0	0.0	0.1	0.0	3.3	24.2	0.4	0.0	0.0	0.0	29.0	1.1%
Tonbridge	1.2	0.0	0.8	1.5	0.6	1.3	0.0	2.3	0.2	7.5	84.2	13.8	0.0	0.0	0.0	0.0	113.4	4.2%
<b>Sub-total within survey area</b>	<b>4.5</b>	<b>6.0</b>	<b>7.0</b>	<b>2.3</b>	<b>10.1</b>	<b>2.0</b>	<b>21.6</b>	<b>6.2</b>	<b>48.2</b>	<b>8.5</b>	<b>87.5</b>	<b>38.5</b>	<b>11.2</b>	<b>38.1</b>	<b>111.7</b>	<b>176.6</b>	<b>580.2</b>	<b>21.7%</b>
<b>Comparison goods floorspace outside survey area</b>																		
Bluewater Shopping Centre	39.2	12.5	10.0	9.6	16.2	21.3	12.6	4.0	17.1	3.3	27.6	51.6	110.3	89.2	159.4	42.6	626.7	23.5%
Crawley	0.0	0.0	0.5	0.0	0.0	0.0	0.1	6.1	10.5	40.4	0.0	0.2	0.0	0.0	0.0	0.0	57.8	2.2%
Maldstone	2.0	0.0	0.1	1.3	1.8	7.3	0.0	0.0	0.1	0.5	16.2	73.4	3.3	0.3	0.0	0.0	106.3	4.0%
Royal Tunbridge Wells	17.7	0.6	4.2	5.4	1.3	2.3	2.7	35.3	3.2	17.5	134.3	15.3	1.5	0.5	0.0	1.1	242.8	9.1%
East Grinstead	0.0	0.0	0.0	0.0	0.1	0.0	0.0	5.9	1.3	107.2	0.3	0.1	0.0	0.0	0.0	0.0	114.9	4.3%
Lakeside	2.1	0.4	2.4	0.9	1.2	0.9	0.8	2.4	0.8	0.0	11.3	5.5	10.1	5.6	21.3	2.4	67.9	2.5%
London (central)	6.1	1.2	1.0	1.2	1.2	1.2	5.1	1.1	4.5	3.2	5.2	1.5	0.9	2.3	5.2	9.8	50.5	1.9%
Bromley	8.6	2.8	6.9	0.3	2.2	0.7	41.7	0.5	1.2	0.2	2.1	0.0	0.8	4.8	4.7	44.8	122.1	4.6%
Redhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	10.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	10.8	0.4%
All other locations outside survey area	1.8	1.4	1.2	0.7	3.5	3.9	10.8	1.3	6.8	8.6	2.5	26.0	46.6	14.0	62.7	15.1	206.9	7.7%
<b>Sub-total outside survey area</b>	<b>77.5</b>	<b>18.8</b>	<b>26.3</b>	<b>19.5</b>	<b>27.4</b>	<b>37.6</b>	<b>73.9</b>	<b>56.6</b>	<b>55.9</b>	<b>181.3</b>	<b>199.4</b>	<b>173.6</b>	<b>173.6</b>	<b>116.5</b>	<b>253.2</b>	<b>115.7</b>	<b>1,406.8</b>	<b>60.2%</b>
Local / small shops in survey area	0.5	0.8	0.6	1.3	3.8	3.4	5.7	0.0	0.0	1.7	1.2	0.8	4.6	3.5	15.3	2.9	46.1	1.7%
<b>Total</b>	<b>232.4</b>	<b>43.7</b>	<b>63.1</b>	<b>51.0</b>	<b>72.5</b>	<b>65.7</b>	<b>114.0</b>	<b>96.5</b>	<b>111.5</b>	<b>193.6</b>	<b>307.9</b>	<b>218.0</b>	<b>194.0</b>	<b>192.5</b>	<b>392.0</b>	<b>321.6</b>	<b>2,669.9</b>	<b>100.0%</b>

Source: Table 3, Table 4

Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 5e: Comparison Goods Allocation 2035 - Spend (£m) (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total Available Spend - 2035</b>	<b>280.2</b>	<b>52.5</b>	<b>76.2</b>	<b>61.7</b>	<b>87.0</b>	<b>78.8</b>	<b>138.2</b>	<b>116.3</b>	<b>134.6</b>	<b>233.0</b>	<b>371.5</b>	<b>264.3</b>	<b>233.2</b>	<b>232.0</b>	<b>476.1</b>	<b>389.1</b>	<b>3,224.6</b>	<b>100.0%</b>
<b>Comparison goods floorspace in Sevenoaks District</b>																		
<b>Sevenoaks</b>																		
Sevenoaks Town Centre	109.1	11.5	19.2	21.1	15.8	16.1	5.2	8.6	2.9	0.0	16.8	5.6	2.4	5.1	5.5	9.2	254.2	7.9%
Sevenoaks Retail Parks	37.9	4.1	6.5	7.7	9.6	6.2	5.8	1.7	2.8	0.0	2.0	0.5	0.2	4.4	0.4	5.0	94.9	2.9%
Sainsbury's, Ottford Road, Sevenoaks	13.4	2.6	0.6	2.5	6.2	1.9	0.0	0.1	0.0	0.0	2.4	0.0	0.0	3.8	0.0	0.9	34.4	1.1%
Tesco Superstore, Aisher Way, Sevenoaks	14.5	2.8	2.1	1.2	1.6	0.6	1.1	0.6	0.2	0.0	2.6	0.0	0.0	0.0	0.0	5.5	32.6	1.0%
<b>Sub-total, Sevenoaks</b>	<b>175.0</b>	<b>21.0</b>	<b>28.3</b>	<b>32.4</b>	<b>33.1</b>	<b>24.7</b>	<b>12.0</b>	<b>11.1</b>	<b>5.9</b>	<b>0.0</b>	<b>23.9</b>	<b>6.2</b>	<b>2.7</b>	<b>13.3</b>	<b>5.9</b>	<b>20.6</b>	<b>416.1</b>	<b>12.9%</b>
<b>Swanley</b>																		
Swanley Town Centre	0.0	0.1	0.0	0.1	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.8	4.5	2.8	27.6	7.9%
Asda Swanley	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	8.4	3.9	4.9	20.3	2.9%
<b>Sub-total, Swanley</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>3.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>27.2</b>	<b>8.4</b>	<b>7.8</b>	<b>47.9</b>	<b>1.1%</b>
<b>Edenbridge</b>																		
Edenbridge Town Centre	0.0	0.0	0.5	0.0	0.0	0.0	0.0	29.3	0.6	2.5	0.0	0.0	0.0	0.0	0.0	0.0	32.8	1.0%
<b>Sub-total Edenbridge</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>29.3</b>	<b>0.6</b>	<b>2.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>32.8</b>	<b>1.0%</b>
<b>Ottford</b>																		
Ottford town centre	5.7	0.6	0.7	1.2	0.4	2.4	0.4	0.2	1.6	0.0	0.0	0.0	0.0	0.8	0.0	3.1	17.2	0.5%
<b>Sub-total, Ottford</b>	<b>5.7</b>	<b>0.6</b>	<b>0.7</b>	<b>1.2</b>	<b>0.4</b>	<b>2.4</b>	<b>0.4</b>	<b>0.2</b>	<b>1.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.8</b>	<b>0.0</b>	<b>3.1</b>	<b>17.2</b>	<b>0.5%</b>
<b>Westerham</b>																		
Westerham Village Centre	0.0	0.0	5.8	0.1	0.0	0.0	2.9	0.1	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.6	10.3	0.3%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>5.8</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>2.9</b>	<b>0.1</b>	<b>0.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>10.3</b>	<b>0.3%</b>
<b>New Ash Green</b>																		
New Ash Green Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0	0.0	2.5	0.1%
<b>Sub-total New Ash Green</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>2.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>2.5</b>	<b>0.1%</b>
<b>Sub-total for Sevenoaks District</b>	<b>180.7</b>	<b>21.8</b>	<b>35.3</b>	<b>33.8</b>	<b>37.4</b>	<b>27.1</b>	<b>15.5</b>	<b>40.6</b>	<b>8.9</b>	<b>2.5</b>	<b>23.9</b>	<b>6.2</b>	<b>5.4</b>	<b>41.3</b>	<b>14.3</b>	<b>32.1</b>	<b>526.8</b>	<b>0.2</b>
<b>Comparison goods floorspace within Survey Area, outside Sevenoaks District</b>																		
Oxted	0.8	0.0	5.4	0.0	0.0	0.0	6.1	4.7	57.6	1.3	0.0	0.0	0.0	0.0	0.0	0.0	75.9	2.4%
Dartford	0.3	0.2	0.0	0.6	5.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	12.5	37.7	123.1	0.7	180.5	5.6%
Oxpington	2.9	7.0	2.1	0.4	5.8	0.1	20.0	0.1	0.2	0.0	0.0	0.6	0.5	8.2	12.6	212.9	273.3	8.5%
West Malling / Kings Hill	0.0	0.0	0.0	0.0	0.5	0.6	0.0	0.0	0.2	0.0	4.0	29.3	0.5	0.0	0.0	0.0	35.1	1.1%
Tonbridge	1.5	0.0	0.9	1.8	0.8	1.5	0.0	2.7	0.3	9.0	101.6	16.8	0.0	0.0	0.0	0.0	136.8	4.2%
<b>Sub-total within survey area</b>	<b>5.5</b>	<b>7.2</b>	<b>8.4</b>	<b>2.8</b>	<b>12.1</b>	<b>2.4</b>	<b>26.2</b>	<b>7.5</b>	<b>58.2</b>	<b>10.3</b>	<b>105.6</b>	<b>46.7</b>	<b>13.5</b>	<b>46.0</b>	<b>135.7</b>	<b>213.6</b>	<b>701.6</b>	<b>21.8%</b>
<b>Comparison goods floorspace outside survey area</b>																		
Bluewater Shopping Centre	47.3	15.1	12.1	11.6	19.5	25.6	15.3	4.8	20.6	4.0	33.3	62.6	132.6	107.5	193.6	51.6	757.0	23.5%
Crawley	0.0	0.0	0.6	0.0	0.0	0.0	0.1	7.4	12.6	48.6	0.0	0.2	0.0	0.0	0.0	0.0	69.6	2.2%
Maldstone	2.4	0.0	0.1	1.6	2.2	8.7	0.0	0.0	0.1	0.7	19.5	88.9	4.0	0.3	0.0	0.0	126.6	4.0%
Royal Tunbridge Wells	21.3	0.7	5.1	6.5	1.6	2.8	3.2	42.5	3.8	21.1	162.0	18.6	1.8	0.5	0.0	1.3	292.9	9.1%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.1	1.6	129.0	0.4	0.1	0.0	0.0	0.0	0.0	138.3	4.3%
Lakeside	2.5	0.5	2.8	1.1	1.4	1.1	1.0	2.9	0.9	0.0	13.6	6.7	12.1	6.7	25.8	2.9	82.1	2.5%
London (central)	7.3	1.4	1.2	1.5	1.4	1.4	6.2	1.3	5.4	3.9	6.3	1.8	1.1	2.8	6.3	11.8	61.0	1.9%
Bromley	10.4	3.3	8.4	0.4	2.6	0.8	50.6	0.6	1.4	0.2	2.5	0.0	1.0	5.7	5.7	54.2	147.7	4.6%
Redhill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	12.6	0.4	0.0	0.0	0.0	0.0	0.0	0.0	13.1	0.4%
All other locations outside survey area	2.1	1.6	1.4	0.9	4.2	4.7	13.1	1.5	8.3	10.3	3.0	31.5	56.1	16.9	76.2	18.2	250.1	7.8%
<b>Sub-total outside survey area</b>	<b>93.5</b>	<b>22.6</b>	<b>31.7</b>	<b>23.6</b>	<b>33.0</b>	<b>45.2</b>	<b>89.5</b>	<b>68.3</b>	<b>67.5</b>	<b>218.1</b>	<b>240.5</b>	<b>210.4</b>	<b>208.7</b>	<b>140.4</b>	<b>307.6</b>	<b>140.0</b>	<b>1,940.5</b>	<b>60.2%</b>
Local / small shops in survey area	0.6	0.9	0.7	1.5	4.5	4.1	7.0	0.0	0.0	2.0	1.5	1.0	5.6	4.3	18.6	3.5	55.7	1.7%
<b>Total</b>	<b>280.2</b>	<b>52.5</b>	<b>76.2</b>	<b>61.7</b>	<b>87.0</b>	<b>78.8</b>	<b>138.2</b>	<b>116.3</b>	<b>134.6</b>	<b>233.0</b>	<b>371.5</b>	<b>264.3</b>	<b>233.2</b>	<b>232.0</b>	<b>476.1</b>	<b>389.1</b>	<b>3,224.6</b>	<b>100.0%</b>

Source: Table 3, Table 4

Sevenoaks District Council — Retail Study 2016  
Comparison Capacity Modelling

Table 6: Existing Comparison Goods Floorspace in Sevenoaks District

<b>In-centre floorspace</b>	<b>Comparison goods floorspace (sq.m net)</b>
Sevenoaks town centre	10,682
Swanley town centre	5,600
Edenbridge town centre	2,583
Westerham town centre	2,861
<b>Total in-centre floorspace</b>	<b>21,726</b>
<b>Out-of-centre floorspace</b>	<b>Comparison goods floorspace (sq.m net)</b>
Sevenoaks Retail Parks	6,827
Non-food floorspace in Sevenoaks out-of-centre foodstores	2,144
<b>Total out-of-centre floorspace</b>	<b>8,971</b>
<b>Overall total</b>	<b>30,697</b>

Source: Experian Goad Category Reports / Goad Plans. Note: Includes comparison floorspace in major foodstores.

Sevenoaks District Council — Retail Study 2016  
 Comparison Capacity Modelling

Table 7: Comparison goods floorspace commitments

Proposed development	Net comparison floorspace (sq.m)	Company average sales (£/sq.m net)	Average turnover 2016 (£m)	Average turnover 2020 (£m)	Average turnover 2025 (£m)	Average turnover 2030 (£m)	Average turnover 2035 (£m)
<i>(No comparison goods commitments)</i>	-	-	-	-	-	-	-
<b>Total</b>	-	-	-	-	-	-	-



Sevenoaks District Council — Sevenoaks Retail Study 2016  
Comparison capacity modelling

Table 8a: Sevenoaks District comparison goods floorspace capacity

	2016	2020	2025	2030*	2035*
Total available expenditure (£m)	1,543.5	1,808.5	2,189.4	2,669.9	3,224.6
Market share from survey area	16	16	16	16	16
Survey area residents' spending (town centres) (£m)	175.5	205.3	248.3	302.6	364.9
Survey area residents' spending (out-of-centre) (£m)	78.0	91.2	110.2	134.2	161.9
<b>TOTAL SPENDING (£m)</b>	<b>253.5</b>	<b>296.5</b>	<b>358.5</b>	<b>436.8</b>	<b>526.8</b>
Existing retail floorspace (sq.m net)	30,697	30,697	30,697	30,697	30,697
Sales per sq.m net (£)	8,257	8,776	9,472	10,223	11,033
Sales from existing floorspace (£m)	253.5	269.4	290.8	313.8	338.7
Sales from commitments (£m)	0	0.0	0.0	0.0	0.0
Residual spending to support new floorspace (£m)	0.0	27.1	67.7	123.0	188.1
Sales per sq.m net in new shops (£)	6,500	6,909	7,457	8,048	8,686
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>3,923</b>	<b>9,085</b>	<b>15,280</b>	<b>21,657</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>3,900</b>	<b>9,100</b>	<b>15,300</b>	<b>21,700</b>

Assumes 1.54% pa growth in sales efficiency 2016-2035 \*Figures should be considered indicative and subject to review during the Local Plan period

Table 8b: Sevenoaks urban area comparison goods floorspace capacity

	2016	2020	2025	2030*	2035*
Total available expenditure (£m)	1,543.5	1,808.5	2,189.4	2,669.9	3,224.6
Market share from survey area	13	13	13	13	13
Survey area residents' spending (town centres) (£m)	122.3	143.1	173.0	210.8	254.2
Survey area residents' spending (out-of-centre) (£m)	78.0	91.2	110.2	134.2	161.9
<b>TOTAL SPENDING (£m)</b>	<b>200.3</b>	<b>234.3</b>	<b>283.2</b>	<b>345.0</b>	<b>416.1</b>
Existing retail floorspace (sq.m net)	19,653	19,653	19,653	19,653	19,653
Sales per sq.m net (£)	10,191	10,833	11,692	12,618	13,619
Sales from existing floorspace (£m)	200.3	212.9	229.8	248.0	267.7
Sales from commitments (£m)	0	0.0	0.0	0.0	0.0
Residual spending to support new floorspace (£m)	0.0	21.4	53.4	97.1	148.5
Sales per sq.m net in new shops (£)	6,500	6,909	7,457	8,048	8,686
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>3,095</b>	<b>7,162</b>	<b>12,059</b>	<b>17,092</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>3,100</b>	<b>7,200</b>	<b>12,100</b>	<b>17,100</b>

Assumes 1.54% pa growth in sales efficiency 2016-2035 \*Figures should be considered indicative and subject to review during the Local Plan period

Table 8c: Swanley comparison goods floorspace capacity

	2016	2020	2025	2030*	2035*
Total available expenditure (£m)	1,543.5	1,808.5	2,189.4	2,669.9	3,224.6
Market share from survey area	1	1	1	1	1
Survey area residents' spending (town centres) (£m)	23.1	27.0	32.6	39.7	47.9
Survey area residents' spending (out-of-centre) (£m)	0.0	0.0	0.0	0.0	0.0
<b>TOTAL SPENDING (£m)</b>	<b>23.1</b>	<b>27.0</b>	<b>32.6</b>	<b>39.7</b>	<b>47.9</b>
Existing retail floorspace (sq.m net)	5,600	5,600	5,600	5,600	5,600
Sales per sq.m net (£)	4,117	4,376	4,723	5,097	5,501
Sales from existing floorspace (£m)	23.1	24.5	26.4	28.5	30.8
Sales from commitments (£m)	0	0.0	0.0	0.0	0.0
Residual spending to support new floorspace (£m)	0.0	2.5	6.1	11.1	17.1
Sales per sq.m net in new shops (£)	6,500	6,909	7,457	8,048	8,686
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>355</b>	<b>822</b>	<b>1,382</b>	<b>1,967</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>400</b>	<b>800</b>	<b>1,400</b>	<b>2,000</b>

Assumes 1.54% pa growth in sales efficiency 2016-2035 \*Figures should be considered indicative and subject to review during the Local Plan period

Table 8d: Edenbridge comparison goods floorspace capacity

	2016	2020	2025	2030*	2035*
Total available expenditure (£m)	1,543.5	1,808.5	2,189.4	2,669.9	3,224.6
Market share from survey area	1	1	1	1	1
Survey area residents' spending (town centres) (£m)	15.7	18.4	22.4	27.2	32.8
Survey area residents' spending (out-of-centre) (£m)	0.0	0.0	0.0	0.0	0.0
<b>TOTAL SPENDING (£m)</b>	<b>15.7</b>	<b>18.4</b>	<b>22.4</b>	<b>27.2</b>	<b>32.8</b>
Existing retail floorspace (sq.m net)	2,583	2,583	2,583	2,583	2,583
Sales per sq.m net (£)	6,085	6,468	6,980	7,534	8,131
Sales from existing floorspace (£m)	15.7	16.7	18.0	19.5	21.0
Sales from commitments (£m)	0	0.0	0.0	0.0	0.0
Residual spending to support new floorspace (£m)	0.0	1.7	4.3	7.8	11.8
Sales per sq.m net in new shops (£)	6,500	6,909	7,457	8,048	8,686
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>250</b>	<b>583</b>	<b>966</b>	<b>1,360</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>300</b>	<b>600</b>	<b>1,000</b>	<b>1,400</b>

Assumes 1.54% pa growth in sales efficiency 2016-2035 \*Figures should be considered indicative and subject to review during the Local Plan period

Table 8e: Otford, Westerham & New Ash Green comparison goods floorspace capacity

	2016	2021	2026	2031*	2035*
Total available expenditure (£m)	1,543.5	1,808.5	2,189.4	2,669.9	3,224.6
Market share from survey area	1	1	1	1	1
Survey area residents' spending (town centres) (£m)	14.4	16.8	20.4	24.8	30.0
Survey area residents' spending (out-of-centre) (£m)	0.0	0.0	0.0	0.0	0.0
<b>TOTAL SPENDING (£m)</b>	<b>14.4</b>	<b>16.8</b>	<b>20.4</b>	<b>24.8</b>	<b>30.0</b>
Capacity for new floorspace (sq.m net)	0	223	518	873	1,238
Capacity for new floorspace (sq.m net, rounded)	0	200	500	900	1,200

Assumes 1.54% pa growth in sales efficiency 2016-2035 \*Figures should be considered indicative and subject to review during the Local Plan period

# CONVENIENCE GOODS MODELLING

Agenda Item 9

Sevenoaks District Council — Retail Capacity Assessment 2016  
Convenience Capacity Modelling

Table 1: Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Total
<b>2016</b>	32,804	5,385	8,705	6,360	10,127	9,391	14,877	14,069	15,739	28,169	50,583	31,498	26,790	33,159	67,447	51,820	<b>406,923</b>
<b>2021</b>	34,268	5,623	9,119	6,647	10,553	9,805	15,706	14,760	16,280	29,355	52,847	33,290	27,776	34,503	71,194	54,525	<b>426,251</b>
<b>2026</b>	35,686	5,840	9,518	6,944	10,932	10,212	16,540	15,454	16,844	30,555	54,935	35,021	28,816	35,857	74,707	57,003	<b>444,864</b>
<b>2031</b>	37,077	6,022	9,897	7,232	11,249	10,506	17,291	16,012	17,418	31,591	56,817	36,629	29,696	37,081	78,046	59,322	<b>461,886</b>
<b>2035</b>	38,018	6,153	10,167	7,441	11,487	10,715	17,822	16,410	17,874	32,324	58,285	37,753	30,357	38,005	80,603	61,028	<b>474,442</b>
<b>Change 2016-35</b>	5,214	768	1,462	1,081	1,360	1,324	2,945	2,341	2,135	4,155	7,702	6,255	3,567	4,846	13,156	9,208	<b>67,519</b>

Source: Experian Micromarketer, accessed June 2016. Population projections are 2014-based.

Table 1b: Survey area postcode sectors

Zone number	Postal sectors	Zone name
Zone 1	TN 13 1/2/3, TN14 5	Sevenoaks
Zone 2	TN14 7	Shoreham
Zone 3	TN14 6, TN16 1	Westerham
Zone 4	TN15 0/9	Igtham
Zone 5	TN15 6	Sevenoaks
Zone 6	TN15 7/8	Wrotham/Borough Green
Zone 7	TN16 2/3	Westerham
Zone 8	TN8 5/6/7	Edenbridge
Zone 9	RH8 0/9	Oxted
Zone 10	RH7 6, RH19 2/3	Lingfield/East Grinstead
Zone 11	TN9 1/2, TN10 3/4, TN11 0/8/9	Tonbridge and Malling
Zone 12	ME18 5, ME19 4/5/6, TN12 5	Maidstone/West Malling/Tonbridge
Zone 13	DA3 7/8, DA13 0	New Ash Green/Meopham
Zone 14	BR8 7/8, DA4 0/9	Swanley/Dartford
Zone 15	DA1 1/2/3, DA2 6/7, DA5 2, DA14 5	Dartford/Bexley/Sidcup
Zone 16	BR5 3/4, BR6 6/7/9	Orpington

Sevenoaks District Centre — Retail Capacity Assessment 2016  
Convenience Capacity Modelling

Table 2: Survey area convenience goods retail expenditure forecasts (per capita, 2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)	(£)
2014	2,444	2,708	2,504	2,679	2,510	2,475	2,399	2,486	2,466	2,433	2,274	2,292	2,493	2,250	2,201	2,163
2016	2,396	2,654	2,454	2,625	2,460	2,426	2,351	2,437	2,417	2,384	2,228	2,246	2,443	2,205	2,157	2,120
<b>2016</b> Minus SFT at 2.8%	<b>2,324</b>	<b>2,574</b>	<b>2,381</b>	<b>2,547</b>	<b>2,386</b>	<b>2,353</b>	<b>2,280</b>	<b>2,364</b>	<b>2,344</b>	<b>2,313</b>	<b>2,161</b>	<b>2,178</b>	<b>2,370</b>	<b>2,139</b>	<b>2,092</b>	<b>2,056</b>
2020	2,410	2,670	2,469	2,641	2,475	2,440	2,365	2,451	2,431	2,399	2,242	2,259	2,458	2,218	2,170	2,132
<b>2020</b> Minus SFT at 4.0%	<b>2,314</b>	<b>2,563</b>	<b>2,370</b>	<b>2,536</b>	<b>2,376</b>	<b>2,343</b>	<b>2,270</b>	<b>2,353</b>	<b>2,334</b>	<b>2,303</b>	<b>2,152</b>	<b>2,169</b>	<b>2,359</b>	<b>2,129</b>	<b>2,083</b>	<b>2,047</b>
2025	2,422	2,683	2,481	2,654	2,487	2,453	2,377	2,464	2,443	2,411	2,253	2,271	2,470	2,229	2,181	2,143
<b>2025</b> Minus SFT at 5.0%	<b>2,301</b>	<b>2,549</b>	<b>2,357</b>	<b>2,522</b>	<b>2,363</b>	<b>2,330</b>	<b>2,258</b>	<b>2,341</b>	<b>2,321</b>	<b>2,290</b>	<b>2,140</b>	<b>2,157</b>	<b>2,346</b>	<b>2,118</b>	<b>2,072</b>	<b>2,036</b>
2030	2,434	2,696	2,494	2,668	2,500	2,465	2,389	2,476	2,456	2,423	2,264	2,282	2,482	2,240	2,192	2,154
<b>2030</b> Minus SFT at 5.7%	<b>2,295</b>	<b>2,543</b>	<b>2,352</b>	<b>2,516</b>	<b>2,357</b>	<b>2,324</b>	<b>2,253</b>	<b>2,335</b>	<b>2,316</b>	<b>2,285</b>	<b>2,135</b>	<b>2,152</b>	<b>2,341</b>	<b>2,112</b>	<b>2,067</b>	<b>2,031</b>
2035	2,446	2,710	2,506	2,681	2,512	2,477	2,401	2,489	2,468	2,435	2,275	2,293	2,495	2,251	2,203	2,165
<b>2035</b> Minus SFT at 6.4%	<b>2,290</b>	<b>2,536</b>	<b>2,346</b>	<b>2,509</b>	<b>2,352</b>	<b>2,319</b>	<b>2,247</b>	<b>2,329</b>	<b>2,310</b>	<b>2,279</b>	<b>2,130</b>	<b>2,147</b>	<b>2,335</b>	<b>2,107</b>	<b>2,062</b>	<b>2,026</b>

Source: Experian Micromarketer, October 2015. Growth rates and allowance for SFT are derived from Experian Retail Planner 13, Figure 1a (for growth rates) / Figure 5 (for SFT)

Table 3: Survey area convenience goods retail expenditure forecasts (2014 prices)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
<b>2016</b>	76.2	13.9	20.7	16.2	24.2	22.1	33.9	33.3	36.9	65.2	109.3	68.6	63.5	70.9	141.1	106.5	902.5
<b>2020</b>	79.3	14.4	21.6	16.9	25.1	23.0	35.7	34.7	38.0	67.6	113.7	72.2	65.5	73.5	148.3	111.6	941.0
<b>2025</b>	82.1	14.9	22.4	17.5	25.8	23.8	37.3	36.2	39.1	70.0	117.6	75.5	67.6	75.9	154.8	116.1	976.7
<b>2030</b>	85.1	15.3	23.3	18.2	26.5	24.4	39.0	37.4	40.3	72.2	121.3	78.8	69.5	78.3	161.3	120.5	1,011.4
<b>2035</b>	87.1	15.6	23.9	18.7	27.0	24.8	40.0	38.2	41.3	73.7	124.1	81.0	70.9	80.1	166.2	123.6	1,036.3
<b>Change 2016-35</b>	<b>10.8</b>	<b>1.7</b>	<b>3.1</b>	<b>2.5</b>	<b>2.8</b>	<b>2.7</b>	<b>6.1</b>	<b>5.0</b>	<b>4.4</b>	<b>8.5</b>	<b>14.8</b>	<b>12.4</b>	<b>7.4</b>	<b>9.2</b>	<b>25.1</b>	<b>17.1</b>	<b>133.8</b>

Source: Tables 1 & 2



Table 4: Convenience goods allocation 2016 - % market share

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16
Centre/Store	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
<b>Convenience goods floorspace in Sevenoaks District</b>																
<b>Sevenoaks</b>																
<b>Town Centre Foodstores</b>																
Waitrose, High Street, Sevenoaks	13.2%	5.5%	8.3%	15.5%	4.7%	5.4%	1.1%	1.6%	0.0%	0.0%	1.7%	0.5%	0.0%	0.2%	0.0%	0.4%
Tesco Metro, High Street, Sevenoaks	2.9%	1.0%	0.5%	3.9%	2.7%	2.6%	0.0%	0.0%	0.0%	0.0%	0.5%	1.4%	0.4%	0.5%	0.0%	0.0%
Marks and Spencer Simply Food, London Road, Sevenoaks	4.4%	1.4%	0.8%	3.7%	1.0%	0.5%	0.2%	0.2%	0.0%	0.0%	1.9%	0.0%	0.0%	0.5%	0.0%	0.0%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>20.5%</b>	<b>8.0%</b>	<b>9.6%</b>	<b>23.1%</b>	<b>8.4%</b>	<b>8.5%</b>	<b>1.3%</b>	<b>1.8%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.1%</b>	<b>1.9%</b>	<b>0.4%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.4%</b>
<b>Edge/out of centre stores</b>																
Sainsbury's Otford Road, Sevenoaks	29.2%	18.7%	7.8%	30.7%	38.0%	17.9%	2.3%	4.3%	2.8%	0.0%	4.2%	0.3%	0.0%	4.8%	2.7%	3.9%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	25.4%	34.8%	25.3%	13.4%	8.6%	7.6%	5.7%	3.8%	0.7%	0.0%	4.6%	0.0%	0.0%	1.2%	0.0%	2.1%
Lidl, London Road, Sevenoaks	10.9%	5.3%	10.0%	8.5%	3.6%	4.3%	1.4%	3.4%	0.7%	0.0%	4.7%	0.4%	0.0%	0.0%	0.0%	0.3%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	2.3%	0.0%	0.0%	1.5%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>67.7%</b>	<b>58.8%</b>	<b>43.2%</b>	<b>54.1%</b>	<b>50.2%</b>	<b>29.8%</b>	<b>10.6%</b>	<b>11.4%</b>	<b>4.3%</b>	<b>0.0%</b>	<b>13.5%</b>	<b>0.7%</b>	<b>0.0%</b>	<b>6.0%</b>	<b>2.7%</b>	<b>6.3%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>88.2%</b>	<b>66.8%</b>	<b>52.8%</b>	<b>77.3%</b>	<b>58.6%</b>	<b>38.3%</b>	<b>11.9%</b>	<b>13.2%</b>	<b>4.3%</b>	<b>0.0%</b>	<b>17.6%</b>	<b>2.6%</b>	<b>0.4%</b>	<b>7.1%</b>	<b>2.7%</b>	<b>6.6%</b>
<b>Swanley</b>																
<b>Town Centre Foodstores</b>																
Aldi, St Mary's Road, Swanley	0.0%	0.4%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	10.8%	1.1%	0.2%
Asda, London Road, Swanley	0.0%	0.2%	0.0%	0.5%	8.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	44.7%	8.7%	2.9%
Other in Swanley Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	1.6%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>9.8%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.7%</b>	<b>56.4%</b>	<b>9.8%</b>	<b>4.7%</b>
<b>Edge/out of centre foodstores</b>																
Co-Op, High Street, Swanley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>4.2%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>9.8%</b>	<b>0.0%</b>	<b>1.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.8%</b>	<b>0.7%</b>	<b>60.6%</b>	<b>9.8%</b>	<b>4.7%</b>
<b>Edenbridge</b>																
<b>Town Centre Foodstores</b>																
Waitrose, Mont St Aignan Way, Edenbridge	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.2%	52.5%	0.9%	0.6%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Tesco Express, 39-41 High Street, Edenbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.2%</b>	<b>0.0%</b>	<b>1.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>60.1%</b>	<b>0.9%</b>	<b>0.6%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.3%</b>	<b>0.0%</b>
<b>Westerham</b>																
<b>Town Centre Foodstores</b>																
Co-op, The Grange, High Street, Westerham	0.0%	0.0%	9.3%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Westerham, other	0.0%	0.0%	5.8%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, Westerham</b>	<b>0.0%</b>	<b>0.0%</b>	<b>15.1%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>1.3%</b>	<b>0.0%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>New Ash Green</b>																
<b>Town Centre Foodstores</b>																
Co-operative, The Row, New Ash Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	8.6%	0.0%	0.0%	0.0%
Other New Ash Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.5%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.9%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>9.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Borough Green</b>																
<b>Town Centre Stores</b>																
Co-op, Station Approach, Borough Green	0.3%	0.0%	0.0%	4.7%	0.0%	16.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%
Local Shops, Borough Green	0.0%	0.0%	0.0%	1.9%	0.0%	16.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, Borough Green main stores</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>6.7%</b>	<b>0.0%</b>	<b>33.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>88.7%</b>	<b>67.4%</b>	<b>69.2%</b>	<b>84.5%</b>	<b>68.4%</b>	<b>72.2%</b>	<b>14.5%</b>	<b>73.3%</b>	<b>5.6%</b>	<b>1.6%</b>	<b>17.6%</b>	<b>3.9%</b>	<b>10.5%</b>	<b>67.7%</b>	<b>13.8%</b>	<b>11.3%</b>

Table 4: Convenience goods allocation 2016 - % market share (continued)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)	Zone 13 (%)	Zone 14 (%)	Zone 15 (%)	Zone 16 (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																
Dartford foodstores	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.2%	0.0%	1.1%	0.0%	0.0%	0.0%	8.0%	42.8%	0.0%
Tonbridge	0.2%	0.0%	0.4%	6.2%	0.9%	3.3%	0.0%	1.0%	0.0%	68.8%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%
East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	78.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Oxted	0.0%	0.5%	13.3%	0.0%	0.0%	0.0%	8.5%	11.6%	75.9%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Malling and Kingshill	0.0%	0.0%	0.0%	0.0%	2.2%	4.9%	0.0%	0.0%	0.0%	5.6%	50.8%	0.8%	0.0%	0.0%	0.0%	0.0%
Longfield	0.0%	0.0%	0.0%	0.0%	0.5%	1.9%	0.4%	0.0%	11.7%	0.0%	0.0%	0.0%	20.7%	0.0%	1.2%	0.0%
Biggin Hill	0.0%	4.1%	7.8%	0.0%	0.0%	0.0%	54.2%	0.4%	0.4%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.8%
Hartley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.2%</b>	<b>4.6%</b>	<b>21.5%</b>	<b>6.2%</b>	<b>5.6%</b>	<b>10.1%</b>	<b>63.1%</b>	<b>15.5%</b>	<b>88.0%</b>	<b>80.4%</b>	<b>74.4%</b>	<b>54.9%</b>	<b>26.0%</b>	<b>8.0%</b>	<b>44.0%</b>	<b>0.8%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																
Greenhithe	0.0%	1.8%	0.0%	0.0%	0.8%	0.3%	0.0%	0.6%	0.0%	0.0%	0.0%	0.8%	3.6%	3.0%	8.0%	1.0%
Gravesend	1.0%	0.0%	0.0%	0.0%	2.0%	2.8%	0.0%	1.3%	0.0%	0.0%	0.0%	0.6%	48.6%	2.5%	2.8%	0.0%
Aylesford	0.0%	0.0%	0.0%	0.0%	0.2%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.5%	0.7%	0.0%	0.0%	0.0%
Orpington	0.0%	12.6%	0.0%	0.2%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	70.2%
Sidcup	0.0%	0.0%	0.0%	0.0%	4.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.7%	10.4%	17.9%	3.0%
Royal Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.2%	1.2%	0.0%	0.0%	0.0%	0.6%	1.0%	1.5%	0.0%	0.0%	0.0%	0.0%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>1.0%</b>	<b>14.3%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>7.4%</b>	<b>11.6%</b>	<b>7.6%</b>	<b>1.9%</b>	<b>0.0%</b>	<b>0.6%</b>	<b>1.0%</b>	<b>21.5%</b>	<b>53.6%</b>	<b>17.7%</b>	<b>28.7%</b>	<b>74.2%</b>
<b>Other stores / local stores (D)</b>	<b>10.1%</b>	<b>13.7%</b>	<b>9.3%</b>	<b>9.1%</b>	<b>18.5%</b>	<b>6.1%</b>	<b>14.9%</b>	<b>9.3%</b>	<b>6.4%</b>	<b>17.4%</b>	<b>7.0%</b>	<b>19.7%</b>	<b>9.8%</b>	<b>6.5%</b>	<b>13.5%</b>	<b>13.6%</b>
<b>Total (A+B+C+D)</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: NEMS Household Survey results, June 2016

Sevenoaks District Council — Retail Study 2016  
Convenience Capacity Modelling

Table 5a: Convenience goods spend 2016 - £m (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total available spend - 2016</b>	<b>76.2</b>	<b>13.9</b>	<b>20.7</b>	<b>16.2</b>	<b>24.2</b>	<b>22.1</b>	<b>33.9</b>	<b>33.3</b>	<b>36.9</b>	<b>65.2</b>	<b>109.3</b>	<b>68.6</b>	<b>63.5</b>	<b>70.9</b>	<b>141.1</b>	<b>106.5</b>	<b>902.5</b>	<b>100.0%</b>
<b>Sevenoaks</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, High Street, Sevenoaks	10.0	0.8	1.7	2.5	1.1	1.2	0.4	0.5	0.0	0.0	1.9	0.3	0.0	0.1	0.0	0.4	21.0	2.3%
Tesco Metro, High Street, Sevenoaks	2.2	0.1	0.1	0.6	0.7	0.6	0.0	0.0	0.0	0.0	0.5	1.0	0.3	0.3	0.0	0.0	6.4	0.7%
Marks and Spencer Simply Food, London Road, Sevenoaks	3.4	0.2	0.2	0.6	0.3	0.1	0.1	0.1	0.0	0.0	2.1	0.0	0.0	0.3	0.0	0.0	7.3	0.8%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>15.6</b>	<b>1.1</b>	<b>2.0</b>	<b>3.7</b>	<b>2.0</b>	<b>1.9</b>	<b>0.4</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>4.5</b>	<b>1.3</b>	<b>0.3</b>	<b>0.8</b>	<b>0.0</b>	<b>0.4</b>	<b>34.7</b>	<b>3.8%</b>
<b>Edge/out of centre stores</b>																		
Sainsbury's Otford Road, Sevenoaks	22.3	2.6	1.6	5.0	9.2	4.0	0.8	1.4	1.0	0.0	4.6	0.2	0.0	3.4	3.8	4.1	64.0	7.1%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	19.3	4.8	5.2	2.2	2.1	1.7	1.9	1.2	0.3	0.0	5.0	0.0	0.0	0.9	0.0	2.2	46.8	5.2%
Lidl, London Road, Sevenoaks	8.3	0.7	2.1	1.4	0.9	0.9	0.5	1.1	0.3	0.0	5.2	0.3	0.0	0.0	0.0	0.3	21.9	2.4%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	1.7	0.0	0.0	0.3	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.3%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>51.6</b>	<b>8.2</b>	<b>9.0</b>	<b>8.8</b>	<b>12.1</b>	<b>6.6</b>	<b>3.6</b>	<b>3.8</b>	<b>1.6</b>	<b>0.0</b>	<b>14.7</b>	<b>0.5</b>	<b>0.0</b>	<b>4.3</b>	<b>3.8</b>	<b>6.7</b>	<b>135.2</b>	<b>15.0%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>67.2</b>	<b>9.3</b>	<b>10.9</b>	<b>12.5</b>	<b>14.2</b>	<b>8.5</b>	<b>4.0</b>	<b>4.4</b>	<b>1.6</b>	<b>0.0</b>	<b>19.3</b>	<b>1.8</b>	<b>0.3</b>	<b>5.0</b>	<b>3.8</b>	<b>7.1</b>	<b>169.8</b>	<b>18.8%</b>
<b>Swanley</b>																		
<b>Town Centre Foodstores</b>																		
Aldi, St Mary's Road, Swanley	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	7.7	1.6	0.2	10.4	1.2%
Asda, London Road, Swanley	0.0	0.0	0.0	0.1	1.9	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.5	31.7	12.3	3.1	49.9	5.5%
Other in Swanley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	1.7	2.3	0.3%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.4</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.5</b>	<b>40.0</b>	<b>13.8</b>	<b>5.0</b>	<b>62.7</b>	<b>6.9%</b>
<b>Edge/out of centre foodstores</b>																		
Co-Op, High Street, Swanley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	3.0	0.3%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.0</b>	<b>0.3%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.4</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.5</b>	<b>43.0</b>	<b>13.8</b>	<b>5.0</b>	<b>65.7</b>	<b>7.3%</b>
<b>Edenbridge</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, Mont St Aignan Way, Edenbridge	0.1	0.0	0.3	0.0	0.0	0.0	0.1	17.5	0.3	0.4	0.0	0.2	0.0	0.0	0.0	0.0	18.9	2.1%
Tesco Express, 39-41 High Street, Edenbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	4.4	0.5%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.1</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>20.0</b>	<b>0.3</b>	<b>0.4</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>1.8</b>	<b>0.0</b>	<b>23.2</b>	<b>2.6%</b>
<b>Westerham</b>																		
<b>Town Centre Foodstores</b>																		
Co-op, The Grange, High Street, Westerham	0.0	0.0	1.9	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.2%
Westerham, other	0.0	0.0	1.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.2%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.7</b>	<b>0.4%</b>
<b>New Ash Green</b>																		
<b>Town Centre Foodstores</b>																		
Co-operative, The Row, New Ash Green	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.6	0.0	0.0	5.5	0.0	0.0	0.0	6.2	0.7%
Other New Ash Green	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>5.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.5</b>	<b>0.7%</b>
<b>Borough Green</b>																		
<b>Town Centre Stores</b>																		
Co-op, Station Approach, Borough Green	0.2	0.0	0.0	0.8	0.0	3.6	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	5.1	0.6%
Local Shops, Borough Green	0.0	0.0	0.0	0.3	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	0.4%
<b>Sub-total, Borough Green main stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>1.1</b>	<b>0.0</b>	<b>7.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>9.1</b>	<b>1.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>67.6</b>	<b>9.3</b>	<b>14.3</b>	<b>13.7</b>	<b>16.5</b>	<b>16.0</b>	<b>4.9</b>	<b>24.4</b>	<b>2.0</b>	<b>1.0</b>	<b>19.3</b>	<b>2.7</b>	<b>6.7</b>	<b>48.0</b>	<b>19.5</b>	<b>12.1</b>	<b>278.1</b>	<b>30.8%</b>

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Table 5a: Convenience goods spend 2016 - £m (2014 prices) (continued)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																		
Dartford foodstores	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.7	0.0	0.0	0.0	5.7	60.3	0.0	67.3	7.5%
Tonbridge	0.1	0.0	0.1	1.0	0.2	0.7	0.0	0.3	0.0	0.0	75.2	2.3	0.0	0.0	0.0	0.0	80.1	8.9%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	51.2	0.0	0.0	0.0	0.0	0.0	0.0	52.0	5.8%
Oxted	0.0	0.1	2.8	0.0	0.0	0.0	2.9	3.8	28.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	37.9	4.2%
West Malling and Kingshill	0.0	0.0	0.0	0.0	0.5	1.1	0.0	0.0	0.0	6.1	34.8	0.5	0.0	0.0	0.0	0.0	43.0	4.8%
Longfield	0.0	0.0	0.0	0.0	0.1	0.4	0.1	0.0	4.3	0.0	0.0	0.0	13.1	0.0	1.7	0.0	19.8	2.2%
Biggin Hill	0.0	0.6	1.6	0.0	0.0	0.0	18.4	0.1	0.1	0.0	0.0	0.5	0.0	0.0	0.0	0.9	22.2	2.5%
Hartley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.0	0.0	2.9	0.3%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.1</b>	<b>0.6</b>	<b>4.5</b>	<b>1.0</b>	<b>1.4</b>	<b>2.2</b>	<b>21.4</b>	<b>5.2</b>	<b>32.5</b>	<b>52.4</b>	<b>81.3</b>	<b>37.7</b>	<b>16.5</b>	<b>5.7</b>	<b>62.1</b>	<b>0.9</b>	<b>325.3</b>	<b>36.0%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																		
Greenhithe	0.0	0.2	0.0	0.0	0.2	0.1	0.0	0.2	0.0	0.0	0.0	0.5	2.3	2.2	11.2	1.1	18.0	2.0%
Gravesend	0.7	0.0	0.0	0.0	0.5	0.6	0.0	0.4	0.0	0.0	0.0	0.4	30.9	1.8	4.0	0.0	39.3	4.4%
Aylesford	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	12.7	0.4	0.0	0.0	0.0	14.7	1.6%
Orpington	0.0	1.7	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	74.8	80.4	8.9%
Sidcup	0.0	0.0	0.0	0.0	1.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.5	7.4	25.3	3.2	37.6	4.2%
Royal Tunbridge Wells	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.4	1.1	1.0	0.0	0.0	0.0	0.0	2.9	0.3%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>0.7</b>	<b>2.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.8</b>	<b>2.6</b>	<b>2.6</b>	<b>0.6</b>	<b>0.0</b>	<b>0.4</b>	<b>1.1</b>	<b>14.7</b>	<b>34.0</b>	<b>12.6</b>	<b>40.5</b>	<b>79.1</b>	<b>192.8</b>	<b>21.4%</b>
<b>Other stores / local stores (D)</b>	<b>7.7</b>	<b>1.9</b>	<b>1.9</b>	<b>1.5</b>	<b>4.5</b>	<b>1.3</b>	<b>5.0</b>	<b>3.1</b>	<b>2.4</b>	<b>11.4</b>	<b>7.6</b>	<b>13.5</b>	<b>6.2</b>	<b>4.6</b>	<b>19.0</b>	<b>14.5</b>	<b>106.3</b>	<b>11.8%</b>
<b>Total (A+B+C+D)</b>	<b>76.2</b>	<b>13.9</b>	<b>20.7</b>	<b>16.2</b>	<b>24.2</b>	<b>22.1</b>	<b>33.9</b>	<b>33.3</b>	<b>36.9</b>	<b>65.2</b>	<b>109.3</b>	<b>68.6</b>	<b>63.5</b>	<b>70.9</b>	<b>141.1</b>	<b>106.5</b>	<b>902.5</b>	<b>100.0%</b>

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Table 5b: Convenience goods spend 2020 - £m (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total available spend - 2020</b>	<b>79.3</b>	<b>14.4</b>	<b>21.6</b>	<b>16.9</b>	<b>25.1</b>	<b>23.0</b>	<b>35.7</b>	<b>34.7</b>	<b>38.0</b>	<b>67.6</b>	<b>113.7</b>	<b>72.2</b>	<b>65.5</b>	<b>73.5</b>	<b>148.3</b>	<b>111.6</b>	<b>941.0</b>	<b>100.0%</b>
<b>Sevenoaks</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, High Street, Sevenoaks	10.4	0.8	1.8	2.6	1.2	1.2	0.4	0.6	0.0	0.0	2.0	0.4	0.0	0.1	0.0	0.4	21.9	2.3%
Tesco Metro, High Street, Sevenoaks	2.3	0.1	0.1	0.7	0.7	0.6	0.0	0.0	0.0	0.0	0.5	1.0	0.3	0.4	0.0	0.0	6.6	0.7%
Marks and Spencer Simply Food, London Road, Sevenoaks	3.5	0.2	0.2	0.6	0.3	0.1	0.1	0.1	0.0	0.0	2.2	0.0	0.0	0.3	0.0	0.0	7.6	0.8%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>16.2</b>	<b>1.1</b>	<b>2.1</b>	<b>3.9</b>	<b>2.1</b>	<b>2.0</b>	<b>0.4</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>4.7</b>	<b>1.4</b>	<b>0.3</b>	<b>0.8</b>	<b>0.0</b>	<b>0.4</b>	<b>36.1</b>	<b>3.8%</b>
<b>Edge/out of centre stores</b>																		
Sainsbury's Otford Road, Sevenoaks	23.2	2.7	1.7	5.2	9.5	4.1	0.8	1.5	1.1	0.0	4.7	0.2	0.0	3.5	4.0	4.3	66.6	7.1%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	20.1	5.0	5.5	2.3	2.1	1.7	2.0	1.3	0.3	0.0	5.2	0.0	0.0	0.9	0.0	2.3	48.7	5.2%
Lidl, London Road, Sevenoaks	8.6	0.8	2.2	1.4	0.9	1.0	0.5	1.2	0.3	0.0	5.4	0.3	0.0	0.0	0.0	0.4	22.8	2.4%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	1.8	0.0	0.0	0.3	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.3%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>53.7</b>	<b>8.5</b>	<b>9.3</b>	<b>9.1</b>	<b>12.6</b>	<b>6.8</b>	<b>3.8</b>	<b>4.0</b>	<b>1.6</b>	<b>0.0</b>	<b>15.3</b>	<b>0.5</b>	<b>0.0</b>	<b>4.4</b>	<b>4.0</b>	<b>7.0</b>	<b>140.7</b>	<b>15.0%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>69.9</b>	<b>9.6</b>	<b>11.4</b>	<b>13.0</b>	<b>14.7</b>	<b>8.8</b>	<b>4.2</b>	<b>4.6</b>	<b>1.6</b>	<b>0.0</b>	<b>20.0</b>	<b>1.9</b>	<b>0.3</b>	<b>5.2</b>	<b>4.0</b>	<b>7.4</b>	<b>176.8</b>	<b>18.8%</b>
<b>Swanley</b>																		
<b>Town Centre Foodstores</b>																		
Aldi, St Mary's Road, Swanley	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	7.9	1.7	0.2	10.8	1.1%
Asda, London Road, Swanley	0.0	0.0	0.0	0.1	2.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.5	32.8	12.9	3.3	52.0	5.5%
Other in Swanley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	1.8	2.4	0.3%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.4</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.5</b>	<b>41.4</b>	<b>14.6</b>	<b>5.2</b>	<b>65.2</b>	<b>6.9%</b>
<b>Edge/out of centre foodstores</b>																		
Co-Op, High Street, Swanley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	3.1	0.3%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.1</b>	<b>0.0</b>	<b>0.0</b>	<b>3.1</b>	<b>0.3%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.4</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.5</b>	<b>44.5</b>	<b>14.6</b>	<b>5.2</b>	<b>68.3</b>	<b>7.3%</b>
<b>Edenbridge</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, Mont St Aignan Way, Edenbridge	0.2	0.0	0.3	0.0	0.0	0.0	0.1	18.2	0.3	0.4	0.0	0.2	0.0	0.0	0.0	0.0	19.7	2.1%
Tesco Express, 39-41 High Street, Edenbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	4.6	0.5%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>20.9</b>	<b>0.3</b>	<b>0.4</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>1.9</b>	<b>0.0</b>	<b>24.3</b>	<b>2.6%</b>
<b>Westerham</b>																		
<b>Town Centre Foodstores</b>																		
Co-op, The Grange, High Street, Westerham	0.0	0.0	2.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.2%
Westerham, other	0.0	0.0	1.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.2%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.9</b>	<b>0.4%</b>
<b>New Ash Green</b>																		
<b>Town Centre Foodstores</b>																		
Co-operative, The Row, New Ash Green	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.6	0.0	0.0	5.6	0.0	0.0	0.0	6.4	0.7%
Other New Ash Green	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>5.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.7</b>	<b>0.7%</b>
<b>Borough Green</b>																		
<b>Town Centre Stores</b>																		
Co-op, Station Approach, Borough Green	0.2	0.0	0.0	0.8	0.0	3.8	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	5.3	0.6%
Local Shops, Borough Green	0.0	0.0	0.0	0.3	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.4%
<b>Sub-total, Borough Green main stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>1.1</b>	<b>0.0</b>	<b>7.7</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>9.5</b>	<b>1.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>70.3</b>	<b>9.7</b>	<b>15.0</b>	<b>14.2</b>	<b>17.2</b>	<b>16.6</b>	<b>5.2</b>	<b>25.5</b>	<b>2.1</b>	<b>1.1</b>	<b>20.0</b>	<b>2.8</b>	<b>6.9</b>	<b>49.8</b>	<b>20.5</b>	<b>12.7</b>	<b>289.4</b>	<b>30.8%</b>

Table 5b: Convenience goods spend 2020 - Em (2014 prices) (continued)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																		
Dartford foodstores	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.7	0.0	0.0	0.0	5.9	63.4	0.0	70.6	7.5%
Tonbridge	0.2	0.0	0.1	1.0	0.2	0.8	0.0	0.4	0.0	0.0	78.3	2.4	0.0	0.0	0.0	0.0	83.3	8.9%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	53.2	0.0	0.0	0.0	0.0	0.0	0.0	54.0	5.7%
Oxted	0.0	0.1	2.9	0.0	0.0	0.0	3.0	4.0	28.8	0.4	0.0	0.0	0.0	0.0	0.0	0.0	39.2	4.2%
West Malling and Kingshill	0.0	0.0	0.0	0.0	0.6	1.1	0.0	0.0	0.0	6.3	36.7	0.5	0.0	0.0	0.0	0.0	45.2	4.8%
Longfield	0.0	0.0	0.0	0.0	0.1	0.4	0.1	0.0	4.5	0.0	0.0	0.0	13.5	0.0	1.8	0.0	20.5	2.2%
Biggin Hill	0.0	0.6	1.7	0.0	0.0	0.0	19.3	0.1	0.2	0.0	0.0	0.6	0.0	0.0	0.0	0.9	23.3	2.5%
Hartley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	3.0	0.3%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.2</b>	<b>0.7</b>	<b>4.7</b>	<b>1.0</b>	<b>1.4</b>	<b>2.3</b>	<b>22.5</b>	<b>5.4</b>	<b>33.4</b>	<b>54.3</b>	<b>84.6</b>	<b>39.6</b>	<b>17.1</b>	<b>5.9</b>	<b>65.2</b>	<b>0.9</b>	<b>339.2</b>	<b>36.0%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																		
Greenhithe	0.0	0.3	0.0	0.0	0.2	0.1	0.0	0.2	0.0	0.0	0.0	0.5	2.3	2.2	11.8	1.1	18.8	2.0%
Gravesend	0.8	0.0	0.0	0.0	0.5	0.6	0.0	0.5	0.0	0.0	0.0	0.4	31.9	1.8	4.2	0.0	40.7	4.3%
Aylesford	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	13.3	0.5	0.0	0.0	0.0	15.4	1.6%
Orpington	0.0	1.8	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	78.4	84.2	8.9%
Sidcup	0.0	0.0	0.0	0.0	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.5	7.7	26.6	3.4	39.4	4.2%
Royal Tunbridge Wells	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.4	1.1	1.1	0.0	0.0	0.0	0.0	3.0	0.3%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>0.8</b>	<b>2.1</b>	<b>0.0</b>	<b>0.0</b>	<b>1.9</b>	<b>2.7</b>	<b>2.7</b>	<b>0.7</b>	<b>0.0</b>	<b>0.4</b>	<b>1.1</b>	<b>15.5</b>	<b>35.1</b>	<b>13.0</b>	<b>42.6</b>	<b>82.9</b>	<b>201.5</b>	<b>21.4%</b>
<b>Other stores / local stores (D)</b>	<b>8.0</b>	<b>2.0</b>	<b>2.0</b>	<b>1.5</b>	<b>4.7</b>	<b>1.4</b>	<b>5.3</b>	<b>3.2</b>	<b>2.4</b>	<b>11.8</b>	<b>8.0</b>	<b>14.2</b>	<b>6.4</b>	<b>4.8</b>	<b>20.0</b>	<b>15.2</b>	<b>111.0</b>	<b>11.8%</b>
<b>Total (A+B+C+D)</b>	<b>79.3</b>	<b>14.4</b>	<b>21.6</b>	<b>16.9</b>	<b>25.1</b>	<b>23.0</b>	<b>35.7</b>	<b>34.7</b>	<b>38.0</b>	<b>67.6</b>	<b>113.7</b>	<b>72.2</b>	<b>65.5</b>	<b>73.5</b>	<b>148.3</b>	<b>111.6</b>	<b>941.0</b>	<b>100.0%</b>



Table 5c: Convenience goods spend 2025 - £m (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total available spend - 2025</b>	<b>82.1</b>	<b>14.9</b>	<b>22.4</b>	<b>17.5</b>	<b>25.8</b>	<b>23.8</b>	<b>37.3</b>	<b>36.2</b>	<b>39.1</b>	<b>70.0</b>	<b>117.6</b>	<b>75.5</b>	<b>67.6</b>	<b>75.9</b>	<b>154.8</b>	<b>116.1</b>	<b>976.7</b>	<b>100.0%</b>
<b>Sevenoaks</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, High Street, Sevenoaks	10.8	0.8	1.9	2.7	1.2	1.3	0.4	0.6	0.0	0.0	2.0	0.4	0.0	0.1	0.0	0.4	22.7	2.3%
Tesco Metro, High Street, Sevenoaks	2.4	0.2	0.1	0.7	0.7	0.6	0.0	0.0	0.0	0.0	0.5	1.1	0.3	0.4	0.0	0.0	6.9	0.7%
Marks and Spencer Simply Food, London Road, Sevenoaks	3.6	0.2	0.2	0.7	0.3	0.1	0.1	0.1	0.0	0.0	2.3	0.0	0.0	0.3	0.0	0.0	7.8	0.8%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>16.8</b>	<b>1.2</b>	<b>2.2</b>	<b>4.1</b>	<b>2.2</b>	<b>2.0</b>	<b>0.5</b>	<b>0.6</b>	<b>0.0</b>	<b>0.0</b>	<b>4.9</b>	<b>1.4</b>	<b>0.3</b>	<b>0.8</b>	<b>0.0</b>	<b>0.4</b>	<b>37.4</b>	<b>3.8%</b>
<b>Edge/out of centre stores</b>																		
Sainsbury's Otford Road, Sevenoaks	24.0	2.8	1.8	5.4	9.8	4.3	0.9	1.5	1.1	0.0	4.9	0.2	0.0	3.6	4.2	4.5	69.0	7.1%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	20.8	5.2	5.7	2.3	2.2	1.8	2.1	1.4	0.3	0.0	5.4	0.0	0.0	0.9	0.0	2.4	50.5	5.2%
Lidl, London Road, Sevenoaks	8.9	0.8	2.3	1.5	0.9	1.0	0.5	1.2	0.3	0.0	5.6	0.3	0.0	0.0	0.0	0.4	23.7	2.4%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	1.9	0.0	0.0	0.3	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.3%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>55.6</b>	<b>8.8</b>	<b>9.7</b>	<b>9.5</b>	<b>13.0</b>	<b>7.1</b>	<b>4.0</b>	<b>4.1</b>	<b>1.7</b>	<b>0.0</b>	<b>15.8</b>	<b>0.5</b>	<b>0.0</b>	<b>4.6</b>	<b>4.2</b>	<b>7.3</b>	<b>145.8</b>	<b>14.9%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>72.4</b>	<b>9.9</b>	<b>11.8</b>	<b>13.5</b>	<b>15.2</b>	<b>9.1</b>	<b>4.4</b>	<b>4.8</b>	<b>1.7</b>	<b>0.0</b>	<b>20.7</b>	<b>2.0</b>	<b>0.3</b>	<b>5.4</b>	<b>4.2</b>	<b>7.7</b>	<b>183.2</b>	<b>18.8%</b>
<b>Swanley</b>																		
<b>Town Centre Foodstores</b>																		
Aldi, St Mary's Road, Swanley	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	8.2	1.7	0.2	11.2	1.1%
Asda, London Road, Swanley	0.0	0.0	0.0	0.1	2.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.5	33.9	13.5	3.4	53.9	5.5%
Other in Swanley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	1.8	2.5	0.3%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.5</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>42.8</b>	<b>15.2</b>	<b>5.4</b>	<b>67.6</b>	<b>6.9%</b>
<b>Edge/out of centre foodstores</b>																		
Co-Op, High Street, Swanley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.2	0.3%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.2</b>	<b>0.0</b>	<b>0.0</b>	<b>3.2</b>	<b>0.3%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.5</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>46.0</b>	<b>15.2</b>	<b>5.4</b>	<b>70.8</b>	<b>7.3%</b>
<b>Edenbridge</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, Mont St Aignan Way, Edenbridge	0.2	0.0	0.3	0.0	0.0	0.0	0.1	19.0	0.3	0.4	0.0	0.2	0.0	0.0	0.0	0.0	20.5	2.1%
Tesco Express, 39-41 High Street, Edenbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	4.8	0.5%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>21.7</b>	<b>0.3</b>	<b>0.4</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.0</b>	<b>0.0</b>	<b>25.3</b>	<b>2.6%</b>
<b>Westerham</b>																		
<b>Town Centre Foodstores</b>																		
Co-op, The Grange, High Street, Westerham	0.0	0.0	2.1	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.2%
Westerham, other	0.0	0.0	1.3	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.2%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.0</b>	<b>0.4%</b>
<b>New Ash Green</b>																		
<b>Town Centre Foodstores</b>																		
Co-operative, The Row, New Ash Green	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.7	0.0	0.0	5.8	0.0	0.0	0.0	6.6	0.7%
Other New Ash Green	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>6.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>6.9</b>	<b>0.7%</b>
<b>Borough Green</b>																		
<b>Town Centre Stores</b>																		
Co-op, Station Approach, Borough Green	0.2	0.0	0.0	0.8	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	5.5	0.6%
Local Shops, Borough Green	0.0	0.0	0.0	0.3	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4	0.4%
<b>Sub-total, Borough Green main stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>1.2</b>	<b>0.0</b>	<b>7.9</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>9.8</b>	<b>1.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>72.8</b>	<b>10.0</b>	<b>15.5</b>	<b>14.8</b>	<b>17.7</b>	<b>17.2</b>	<b>5.4</b>	<b>26.5</b>	<b>2.2</b>	<b>1.1</b>	<b>20.7</b>	<b>3.0</b>	<b>7.1</b>	<b>51.4</b>	<b>21.4</b>	<b>13.2</b>	<b>300.0</b>	<b>30.7%</b>

Table 5c: Convenience goods spend 2025 - £m (2014 prices) (continued)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																		
Dartford foodstores	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.8	0.0	0.0	6.1	66.2	0.0		73.6	7.5%
Tonbridge	0.2	0.0	0.1	1.1	0.2	0.8	0.0	0.4	0.0	0.0	80.9	2.5	0.0	0.0	0.0	0.0	86.2	8.8%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	55.0	0.0	0.0	0.0	0.0	0.0	0.0	55.9	5.7%
Oxted	0.0	0.1	3.0	0.0	0.0	0.0	3.2	4.2	29.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	40.5	4.1%
West Malling and Kingshill	0.0	0.0	0.0	0.0	0.6	1.2	0.0	0.0	0.0	6.5	38.4	0.5	0.0	0.0	0.0	0.0	47.2	4.8%
Longfield	0.0	0.0	0.0	0.0	0.1	0.4	0.2	0.0	4.6	0.0	0.0	0.0	14.0	0.0	1.9	0.0	21.2	2.2%
Biggin Hill	0.0	0.6	1.7	0.0	0.0	0.0	20.2	0.2	0.2	0.0	0.0	0.6	0.0	0.0	0.0	0.9	24.4	2.5%
Hartley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	0.0	3.1	0.3%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.2</b>	<b>0.7</b>	<b>4.8</b>	<b>1.1</b>	<b>1.4</b>	<b>2.4</b>	<b>23.6</b>	<b>5.6</b>	<b>34.4</b>	<b>56.2</b>	<b>87.4</b>	<b>41.5</b>	<b>17.6</b>	<b>6.1</b>	<b>68.1</b>	<b>0.9</b>	<b>352.0</b>	<b>36.0%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																		
Greenhithe	0.0	0.3	0.0	0.0	0.2	0.1	0.0	0.2	0.0	0.0	0.0	0.6	2.4	2.3	12.3	1.2	19.5	2.0%
Gravesend	0.8	0.0	0.0	0.0	0.5	0.7	0.0	0.5	0.0	0.0	0.0	0.4	32.9	1.9	4.4	0.0	42.0	4.3%
Aylesford	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	13.9	0.5	0.0	0.0	0.0	16.1	1.7%
Orpington	0.0	1.9	0.0	0.0	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	81.5	87.5	9.0%
Sidcup	0.0	0.0	0.0	0.0	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.5	7.9	27.8	3.5	41.0	4.2%
Royal Tunbridge Wells	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.4	1.2	1.1	0.0	0.0	0.0	0.0	3.1	0.3%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>0.8</b>	<b>2.1</b>	<b>0.0</b>	<b>0.0</b>	<b>1.9</b>	<b>2.8</b>	<b>2.9</b>	<b>0.7</b>	<b>0.0</b>	<b>0.4</b>	<b>1.2</b>	<b>16.2</b>	<b>36.3</b>	<b>13.4</b>	<b>44.5</b>	<b>86.2</b>	<b>209.3</b>	<b>21.4%</b>
<b>Other stores / local stores (D)</b>	<b>8.3</b>	<b>2.0</b>	<b>2.1</b>	<b>1.6</b>	<b>4.8</b>	<b>1.4</b>	<b>5.6</b>	<b>3.4</b>	<b>2.5</b>	<b>12.2</b>	<b>8.2</b>	<b>14.9</b>	<b>6.6</b>	<b>5.0</b>	<b>20.9</b>	<b>15.8</b>	<b>115.3</b>	<b>11.8%</b>
<b>Total (A+B+C+D)</b>	<b>82.1</b>	<b>14.9</b>	<b>22.4</b>	<b>17.5</b>	<b>25.8</b>	<b>23.8</b>	<b>37.3</b>	<b>36.2</b>	<b>39.1</b>	<b>70.0</b>	<b>117.6</b>	<b>75.5</b>	<b>67.6</b>	<b>75.9</b>	<b>154.8</b>	<b>116.1</b>	<b>976.7</b>	<b>100.0%</b>

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Table 5d: Convenience goods spend 2030 - £m (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total available spend - 2030</b>	<b>85.1</b>	<b>15.3</b>	<b>23.3</b>	<b>18.2</b>	<b>26.5</b>	<b>24.4</b>	<b>39.0</b>	<b>37.4</b>	<b>40.3</b>	<b>72.2</b>	<b>121.3</b>	<b>78.8</b>	<b>69.5</b>	<b>78.3</b>	<b>161.3</b>	<b>120.5</b>	<b>1,011.4</b>	<b>100.0%</b>
<b>Sevenoaks</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, High Street, Sevenoaks	11.2	0.8	1.9	2.8	1.2	1.3	0.4	0.6	0.0	0.0	2.1	0.4	0.0	0.1	0.0	0.5	23.5	2.3%
Tesco Metro, High Street, Sevenoaks	2.5	0.2	0.1	0.7	0.7	0.6	0.0	0.0	0.0	0.0	0.6	1.1	0.3	0.4	0.0	0.0	7.1	0.7%
Marks and Spencer Simply Food, London Road, Sevenoaks	3.8	0.2	0.2	0.7	0.3	0.1	0.1	0.1	0.0	0.0	2.4	0.0	0.0	0.4	0.0	0.0	8.1	0.8%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>17.4</b>	<b>1.2</b>	<b>2.2</b>	<b>4.2</b>	<b>2.2</b>	<b>2.1</b>	<b>0.5</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>5.0</b>	<b>1.5</b>	<b>0.3</b>	<b>0.9</b>	<b>0.0</b>	<b>0.5</b>	<b>38.7</b>	<b>3.8%</b>
<b>Edge/out of centre stores</b>																		
Sainsbury's Otford Road, Sevenoaks	24.9	2.9	1.8	5.6	10.1	4.4	0.9	1.6	1.1	0.0	5.1	0.2	0.0	3.8	4.4	4.7	71.4	7.1%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	21.6	5.3	5.9	2.4	2.3	1.8	2.2	1.4	0.3	0.0	5.6	0.0	0.0	1.0	0.0	2.5	52.3	5.2%
Lidl, London Road, Sevenoaks	9.3	0.8	2.3	1.5	1.0	1.0	0.5	1.3	0.3	0.0	5.7	0.3	0.0	0.0	0.0	0.4	24.5	2.4%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	1.9	0.0	0.0	0.3	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.3%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>57.7</b>	<b>9.0</b>	<b>10.1</b>	<b>9.8</b>	<b>13.3</b>	<b>7.3</b>	<b>4.1</b>	<b>4.3</b>	<b>1.7</b>	<b>0.0</b>	<b>16.4</b>	<b>0.6</b>	<b>0.0</b>	<b>4.7</b>	<b>4.4</b>	<b>7.5</b>	<b>150.8</b>	<b>14.9%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>75.1</b>	<b>10.2</b>	<b>12.3</b>	<b>14.1</b>	<b>15.6</b>	<b>9.4</b>	<b>4.6</b>	<b>4.9</b>	<b>1.7</b>	<b>0.0</b>	<b>21.4</b>	<b>2.0</b>	<b>0.3</b>	<b>5.6</b>	<b>4.4</b>	<b>8.0</b>	<b>189.5</b>	<b>18.7%</b>
<b>Swanley</b>																		
<b>Town Centre Foodstores</b>																		
Aldi, St Mary's Road, Swanley	0.0	0.1	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	8.5	1.8	0.2	11.6	1.1%
Asda, London Road, Swanley	0.0	0.0	0.0	0.1	2.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.5	35.0	14.0	3.5	55.7	5.5%
Other in Swanley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	1.9	2.6	0.3%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.6</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>44.2</b>	<b>15.8</b>	<b>5.7</b>	<b>69.9</b>	<b>6.9%</b>
<b>Edge/out of centre foodstores</b>																		
Co-Op, High Street, Swanley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0	3.3	0.3%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.3</b>	<b>0.0</b>	<b>0.0</b>	<b>3.3</b>	<b>0.3%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.6</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>47.5</b>	<b>15.8</b>	<b>5.7</b>	<b>73.3</b>	<b>7.2%</b>
<b>Edenbridge</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, Mont St Aignan Way, Edenbridge	0.2	0.0	0.3	0.0	0.0	0.0	0.1	19.6	0.4	0.4	0.0	0.2	0.0	0.0	0.0	0.0	21.2	2.1%
Tesco Express, 39-41 High Street, Edenbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	4.9	0.5%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>22.5</b>	<b>0.4</b>	<b>0.4</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.1</b>	<b>0.0</b>	<b>26.1</b>	<b>2.6%</b>
<b>Westerham</b>																		
<b>Town Centre Foodstores</b>																		
Co-op, The Grange, High Street, Westerham	0.0	0.0	2.2	0.0	0.0	0.0	0.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.2%
Westerham, other	0.0	0.0	1.3	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.2%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.2</b>	<b>0.4%</b>
<b>New Ash Green</b>																		
<b>Town Centre Foodstores</b>																		
Co-operative, The Row, New Ash Green	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.7	0.0	0.0	6.0	0.0	0.0	0.0	6.8	0.7%
Other New Ash Green	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>6.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>7.1</b>	<b>0.7%</b>
<b>Borough Green</b>																		
<b>Town Centre Stores</b>																		
Co-op, Station Approach, Borough Green	0.3	0.0	0.0	0.9	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	5.6	0.6%
Local Shops, Borough Green	0.0	0.0	0.0	0.4	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.5	0.4%
<b>Sub-total, Borough Green main stores</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>1.2</b>	<b>0.0</b>	<b>8.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>10.1</b>	<b>1.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>75.5</b>	<b>10.3</b>	<b>16.1</b>	<b>15.4</b>	<b>18.1</b>	<b>17.6</b>	<b>5.6</b>	<b>27.4</b>	<b>2.2</b>	<b>1.1</b>	<b>21.4</b>	<b>3.1</b>	<b>7.3</b>	<b>53.1</b>	<b>22.3</b>	<b>13.7</b>	<b>310.3</b>	<b>30.7%</b>

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Table 5d: Convenience goods spend 2030 - Em (2014 prices) (continued)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																		
Dartford foodstores	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.8	0.0	0.0	0.0	6.3	69.0	0.0	76.6	7.6%
Tonbridge	0.2	0.0	0.1	1.1	0.2	0.8	0.0	0.4	0.0	0.0	83.5	2.6	0.0	0.0	0.0	0.0	88.9	8.8%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	56.8	0.0	0.0	0.0	0.0	0.0	0.0	57.6	5.7%
Oxted	0.0	0.1	3.1	0.0	0.0	0.0	3.3	4.3	30.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	41.9	4.1%
West Malling and Kingshill	0.0	0.0	0.0	0.0	0.6	1.2	0.0	0.0	0.0	6.7	40.0	0.6	0.0	0.0	0.0	0.0	49.1	4.9%
Longfield	0.0	0.0	0.0	0.0	0.1	0.5	0.2	0.0	4.7	0.0	0.0	0.0	14.4	0.0	2.0	0.0	21.8	2.2%
Biggin Hill	0.0	0.6	1.8	0.0	0.0	0.0	21.1	0.2	0.2	0.0	0.0	0.6	0.0	0.0	0.0	1.0	25.4	2.5%
Hartley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	3.2	0.3%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.2</b>	<b>0.7</b>	<b>5.0</b>	<b>1.1</b>	<b>1.5</b>	<b>2.5</b>	<b>24.6</b>	<b>5.8</b>	<b>35.5</b>	<b>58.0</b>	<b>90.2</b>	<b>43.3</b>	<b>18.1</b>	<b>6.3</b>	<b>70.9</b>	<b>1.0</b>	<b>364.6</b>	<b>36.0%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																		
Greenhithe	0.0	0.3	0.0	0.0	0.2	0.1	0.0	0.2	0.0	0.0	0.0	0.6	2.5	2.4	12.9	1.2	20.3	2.0%
Gravesend	0.8	0.0	0.0	0.0	0.5	0.7	0.0	0.5	0.0	0.0	0.0	0.5	33.8	2.0	4.5	0.0	43.3	4.3%
Aylesford	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	14.5	0.5	0.0	0.0	0.0	16.8	1.7%
Orpington	0.0	1.9	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	84.6	90.9	9.0%
Sidcup	0.0	0.0	0.0	0.0	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.5	8.2	28.9	3.6	42.6	4.2%
Royal Tunbridge Wells	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.5	1.2	1.2	0.0	0.0	0.0	0.0	3.2	0.3%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>0.8</b>	<b>2.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.0</b>	<b>2.8</b>	<b>3.0</b>	<b>0.7</b>	<b>0.0</b>	<b>0.5</b>	<b>1.2</b>	<b>16.9</b>	<b>37.3</b>	<b>13.9</b>	<b>46.3</b>	<b>89.5</b>	<b>217.1</b>	<b>21.5%</b>
<b>Other stores / local stores (D)</b>	<b>8.6</b>	<b>2.1</b>	<b>2.2</b>	<b>1.7</b>	<b>4.9</b>	<b>1.5</b>	<b>5.8</b>	<b>3.5</b>	<b>2.6</b>	<b>12.6</b>	<b>8.5</b>	<b>15.5</b>	<b>6.8</b>	<b>5.1</b>	<b>21.8</b>	<b>16.4</b>	<b>119.5</b>	<b>11.8%</b>
<b>Total (A+B+C+D)</b>	<b>85.1</b>	<b>15.3</b>	<b>23.3</b>	<b>18.2</b>	<b>26.5</b>	<b>24.4</b>	<b>39.0</b>	<b>37.4</b>	<b>40.3</b>	<b>72.2</b>	<b>121.3</b>	<b>78.8</b>	<b>69.5</b>	<b>78.3</b>	<b>161.3</b>	<b>120.5</b>	<b>1,011.4</b>	<b>100.0%</b>

Table 5e: Convenience goods spend 2035 - £m (2014 prices)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Total available spend - 2035</b>	<b>87.1</b>	<b>15.6</b>	<b>23.9</b>	<b>18.7</b>	<b>27.0</b>	<b>24.8</b>	<b>40.0</b>	<b>38.2</b>	<b>41.3</b>	<b>73.7</b>	<b>124.1</b>	<b>81.0</b>	<b>70.9</b>	<b>80.1</b>	<b>166.2</b>	<b>123.6</b>	<b>1036.3</b>	<b>100.0%</b>
<b>Sevenoaks</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, High Street, Sevenoaks	11.5	0.9	2.0	2.9	1.3	1.3	0.4	0.6	0.0	0.0	2.2	0.4	0.0	0.1	0.0	0.5	24.0	2.3%
Tesco Metro, High Street, Sevenoaks	2.5	0.2	0.1	0.7	0.7	0.6	0.0	0.0	0.0	0.0	0.6	1.1	0.3	0.4	0.0	0.0	7.3	0.7%
Marks and Spencer Simply Food, London Road, Sevenoaks	3.8	0.2	0.2	0.7	0.3	0.1	0.1	0.1	0.0	0.0	2.4	0.0	0.0	0.4	0.0	0.0	8.3	0.8%
<b>Sub-total, Sevenoaks Town Centre Stores</b>	<b>17.8</b>	<b>1.2</b>	<b>2.3</b>	<b>4.3</b>	<b>2.3</b>	<b>2.1</b>	<b>0.5</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>5.1</b>	<b>1.5</b>	<b>0.3</b>	<b>0.9</b>	<b>0.0</b>	<b>0.5</b>	<b>39.6</b>	<b>3.8%</b>
<b>Edge/out of centre stores</b>																		
Sainsbury's Otford Road, Sevenoaks	25.4	2.9	1.9	5.7	10.3	4.5	0.9	1.6	1.2	0.0	5.2	0.2	0.0	3.8	4.5	4.8	73.0	7.0%
Tesco Superstore, Aisher Way, Riverhead, Sevenoaks	22.1	5.4	6.0	2.5	2.3	1.9	2.3	1.4	0.3	0.0	5.7	0.0	0.0	1.0	0.0	2.5	53.5	5.2%
Lidl, London Road, Sevenoaks	9.5	0.8	2.4	1.6	1.0	1.1	0.6	1.3	0.3	0.0	5.9	0.3	0.0	0.0	0.0	0.4	25.1	2.4%
Little Waitrose, Tubs Hill, London Road, Sevenoaks	2.0	0.0	0.0	0.3	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.3%
<b>Sub-total, Sevenoaks Edge/out of centre stores</b>	<b>59.0</b>	<b>9.2</b>	<b>10.3</b>	<b>10.1</b>	<b>13.6</b>	<b>7.4</b>	<b>4.3</b>	<b>4.4</b>	<b>1.8</b>	<b>0.0</b>	<b>16.7</b>	<b>0.6</b>	<b>0.0</b>	<b>4.8</b>	<b>4.5</b>	<b>7.7</b>	<b>154.3</b>	<b>14.9%</b>
<b>Sub-total, Sevenoaks main stores</b>	<b>76.8</b>	<b>10.4</b>	<b>12.6</b>	<b>14.4</b>	<b>15.8</b>	<b>9.5</b>	<b>4.8</b>	<b>5.0</b>	<b>1.8</b>	<b>0.0</b>	<b>21.9</b>	<b>2.1</b>	<b>0.3</b>	<b>5.7</b>	<b>4.5</b>	<b>8.2</b>	<b>193.9</b>	<b>18.7%</b>
<b>Swanley</b>																		
<b>Town Centre Foodstores</b>																		
Aldi, St Mary's Road, Swanley	0.0	0.1	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	8.7	1.9	0.2	11.9	1.1%
Asda, London Road, Swanley	0.0	0.0	0.0	0.1	2.2	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.5	35.8	14.5	3.6	57.1	5.5%
Other in Swanley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	2.0	2.7	0.3%
<b>Sub-total, Swanley, Town Centre Stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.6</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>45.2</b>	<b>16.3</b>	<b>5.8</b>	<b>71.6</b>	<b>6.9%</b>
<b>Edge/out of centre foodstores</b>																		
Co-Op, High Street, Swanley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	0.0	0.0	3.4	0.3%
<b>Sub-total, Swanley Edge/out of centre stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>3.4</b>	<b>0.0</b>	<b>0.0</b>	<b>3.4</b>	<b>0.3%</b>
<b>Sub-total, Swanley main stores</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>2.6</b>	<b>0.0</b>	<b>0.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.6</b>	<b>0.5</b>	<b>48.6</b>	<b>16.3</b>	<b>5.8</b>	<b>75.0</b>	<b>7.2%</b>
<b>Edenbridge</b>																		
<b>Town Centre Foodstores</b>																		
Waitrose, Mont St Aignan Way, Edenbridge	0.2	0.0	0.3	0.0	0.0	0.0	0.1	20.1	0.4	0.5	0.0	0.2	0.0	0.0	0.0	0.0	21.7	2.1%
Tesco Express, 39-41 High Street, Edenbridge	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	5.1	0.5%
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>0.2</b>	<b>0.0</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>23.0</b>	<b>0.4</b>	<b>0.5</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.2</b>	<b>0.0</b>	<b>26.8</b>	<b>2.6%</b>
<b>Westerham</b>																		
<b>Town Centre Foodstores</b>																		
Co-op, The Grange, High Street, Westerham	0.0	0.0	2.2	0.0	0.0	0.0	0.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.2%
Westerham, other	0.0	0.0	1.4	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.2%
<b>Sub-total, Westerham</b>	<b>0.0</b>	<b>0.0</b>	<b>3.6</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>4.3</b>	<b>0.4%</b>
<b>New Ash Green</b>																		
<b>Town Centre Foodstores</b>																		
Co-operative, The Row, New Ash Green	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.7	0.0	0.0	6.1	0.0	0.0	0.0	6.9	0.7%
Other New Ash Green	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0%
<b>Sub-total, New Ash Green Town Centre Stores</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.7</b>	<b>0.0</b>	<b>0.0</b>	<b>6.4</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>7.2</b>	<b>0.7%</b>
<b>Borough Green</b>																		
<b>Town Centre Stores</b>																		
Co-op, Station Approach, Borough Green	0.3	0.0	0.0	0.9	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	5.7	0.6%
Local Shops, Borough Green	0.0	0.0	0.0	0.4	0.0	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	0.4%
<b>Sub-total, Borough Green main stores</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>1.2</b>	<b>0.0</b>	<b>8.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.2</b>	<b>0.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>10.3</b>	<b>1.0%</b>
<b>Sub-total main stores in Sevenoaks District (A)</b>	<b>77.2</b>	<b>10.5</b>	<b>16.5</b>	<b>15.8</b>	<b>18.5</b>	<b>17.9</b>	<b>5.8</b>	<b>28.0</b>	<b>2.3</b>	<b>1.1</b>	<b>21.9</b>	<b>3.2</b>	<b>7.5</b>	<b>54.2</b>	<b>23.0</b>	<b>14.0</b>	<b>317.4</b>	<b>30.6%</b>

Table 5e: Convenience goods spend 2035 - £m (2014 prices) (continued)

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Zone 16 (£m)	Total (£m)	Total (%)
<b>Convenience Goods Outside Sevenoaks District, within Survey Area</b>																		
Dartford foodstores	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.8	0.0	0.0	0.0	6.4	71.1	0.0	78.9	7.6%
Tonbridge	0.2	0.0	0.1	1.2	0.2	0.8	0.0	0.4	0.0	0.0	85.4	2.7	0.0	0.0	0.0	0.0	91.0	8.8%
East Grinstead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	58.0	0.0	0.0	0.0	0.0	0.0	0.0	58.8	5.7%
Oxted	0.0	0.1	3.2	0.0	0.0	0.0	3.4	4.4	31.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0	42.9	4.1%
West Malling and Kingshill	0.0	0.0	0.0	0.0	0.6	1.2	0.0	0.0	0.0	6.9	41.1	0.6	0.0	0.0	0.0	0.0	50.4	4.9%
Longfield	0.0	0.0	0.0	0.0	0.1	0.5	0.2	0.0	4.9	0.0	0.0	0.0	14.6	0.0	2.0	0.0	22.3	2.2%
Biggin Hill	0.0	0.6	1.9	0.0	0.0	0.0	21.7	0.2	0.2	0.0	0.0	0.6	0.0	0.0	0.0	1.0	26.1	2.5%
Hartley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	3.2	0.3%
<b>Sub-total, main stores outside Sevenoaks District, within survey area (B)</b>	<b>0.2</b>	<b>0.7</b>	<b>5.1</b>	<b>1.2</b>	<b>1.5</b>	<b>2.5</b>	<b>25.3</b>	<b>5.9</b>	<b>36.3</b>	<b>59.2</b>	<b>92.3</b>	<b>44.5</b>	<b>18.5</b>	<b>6.4</b>	<b>73.1</b>	<b>1.0</b>	<b>373.7</b>	<b>36.1%</b>
<b>Convenience Goods Outside Sevenoaks District, outside of Survey Area</b>																		
Greenhithe	0.0	0.3	0.0	0.0	0.2	0.1	0.0	0.2	0.0	0.0	0.0	0.6	2.5	2.4	13.2	1.3	20.8	2.0%
Gravesend	0.8	0.0	0.0	0.0	0.5	0.7	0.0	0.5	0.0	0.0	0.0	0.5	34.5	2.0	4.7	0.0	44.2	4.3%
Aylesford	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	15.0	0.5	0.0	0.0	0.0	17.2	1.7%
Orpington	0.0	2.0	0.0	0.0	0.0	0.0	3.1	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	86.8	93.2	9.0%
Sidcup	0.0	0.0	0.0	0.0	1.2	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.5	8.4	29.8	3.7	43.8	4.2%
Royal Tunbridge Wells	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.5	1.2	1.2	0.0	0.0	0.0	0.0	3.3	0.3%
<b>Sub-total, main stores outside Sevenoaks District, outside survey area (C)</b>	<b>0.8</b>	<b>2.2</b>	<b>0.0</b>	<b>0.0</b>	<b>2.0</b>	<b>2.9</b>	<b>3.1</b>	<b>0.7</b>	<b>0.0</b>	<b>0.5</b>	<b>1.2</b>	<b>17.4</b>	<b>38.0</b>	<b>14.2</b>	<b>47.7</b>	<b>91.8</b>	<b>222.6</b>	<b>21.5%</b>
<b>Other stores / local stores (D)</b>	<b>8.8</b>	<b>2.1</b>	<b>2.2</b>	<b>1.7</b>	<b>5.0</b>	<b>1.5</b>	<b>6.0</b>	<b>3.6</b>	<b>2.7</b>	<b>12.8</b>	<b>8.7</b>	<b>16.0</b>	<b>6.9</b>	<b>5.2</b>	<b>22.4</b>	<b>16.8</b>	<b>122.5</b>	<b>11.8%</b>
<b>Total (A+B+C+D)</b>	<b>87.1</b>	<b>15.6</b>	<b>23.9</b>	<b>18.7</b>	<b>27.0</b>	<b>24.8</b>	<b>40.0</b>	<b>38.2</b>	<b>41.3</b>	<b>73.7</b>	<b>124.1</b>	<b>81.0</b>	<b>70.9</b>	<b>80.1</b>	<b>166.2</b>	<b>123.6</b>	<b>1036.3</b>	<b>100.0%</b>



Table 6: Trading performance of main foodstores in Sevenoaks District

	Total net floorspace (sq.m)	Net Conv Ratio (%)	Net Convenience (sqm)	Co-Average Sales (£ per sqm net)	Average Turnover 2016 (£m)	Actual Turnover 2016 (£m) (table 5a)	Difference from Avg Turnover 2016 (£m)
<b>Sevenoaks</b>							
<b>Town Centre Foodstores</b>							
Waitrose, High Street, Sevenoaks	2,208	90%	1,987	12,429	24.7	21.0	-3.7
Tesco Metro, High Street, Sevenoaks	1,897	70%	1,328	11,497	15.3	6.4	-8.9
Marks and Spencer Simply Food, London Road, Sevenoaks	600	95%	572	11,003	6.3	7.3	1.0
<b>Sub-total, Sevenoaks in-centre stores</b>	<b>4,705</b>	<b>-</b>	<b>3,887</b>	<b>11,901</b>	<b>46.3</b>	<b>34.7</b>	<b>-11.6</b>
<b>Edge/out of centre stores</b>							
Sainsbury's Orford Road, Sevenoaks	3,814	72%	2,754	12,053	33.2	64.0	30.8
Tesco Superstore, Asher Way, Riverhead, Sevenoaks	3,198	74%	2,421	11,497	27.8	46.8	19.0
Lidl, London Road, Sevenoaks	1,286	80%	1,029	3,487	3.6	21.9	18.4
Little Waitrose, Tubs Hill, London Road, Sevenoaks	230	95%	218	12,429	2.7	2.4	-0.3
<b>Sub-total, Sevenoaks out of centre stores</b>	<b>8,527</b>	<b>-</b>	<b>6,421</b>	<b>10,484</b>	<b>67.3</b>	<b>135.2</b>	<b>67.9</b>
<b>Overall total for Sevenoaks (A)</b>	<b>13,232</b>	<b>-</b>	<b>10,308</b>	<b>11,018</b>	<b>113.6</b>	<b>169.8</b>	<b>56.3</b>
<b>Swanley</b>							
<b>Town Centre Foodstores</b>							
Aldi, St Mary's Road, Swanley	650	80%	520	9,602	5.0	10.4	5.4
Asda, London Road, Swanley	5,460	67%	3,658	13,210	48.3	49.9	1.6
Other in Swanley Town Centre	-	-	-	-	-	2.3	-
<b>Sub-total, Swanley in centre stores</b>	<b>6,111</b>	<b>-</b>	<b>4,179</b>	<b>12,761</b>	<b>53.3</b>	<b>62.7</b>	<b>7.0</b>
<b>Edge/out of centre foodstores</b>							
Co-Op, High Street, Swanley	303	87%	265	7,741	2.0	3.0	1.0
<b>Sub-total Swanley out of centre stores</b>	<b>303</b>	<b>-</b>	<b>265</b>	<b>7,741</b>	<b>2.0</b>	<b>3.0</b>	<b>1.0</b>
<b>Overall total for Swanley (B)</b>	<b>6,414</b>	<b>-</b>	<b>4,443</b>	<b>12,462</b>	<b>55.4</b>	<b>65.7</b>	<b>8.0</b>
<b>Edenbridge</b>							
<b>Town Centre Foodstores</b>							
Waitrose, Mont St Aignan Way, Edenbridge	1,152	85%	979	12,429	12.2	18.9	6.7
Tesco Express, 39-41 High Street, Edenbridge	412	95%	392	11,497	4.5	4.4	-0.2
<b>Sub-total, Edenbridge Town Centre Stores</b>	<b>1,564</b>	<b>-</b>	<b>1,371</b>	<b>10,484</b>	<b>16.7</b>	<b>23.2</b>	<b>6.6</b>
<b>Overall total for Edenbridge (C)</b>	<b>1,564</b>	<b>-</b>	<b>1,371</b>	<b>10,484</b>	<b>16.7</b>	<b>23.2</b>	<b>6.6</b>
<b>Westerham</b>							
<b>Town Centre Foodstores</b>							
Co-op, The Grange, High Street, Westerham	202	95%	192	7,741	1.5	2.2	0.7
Westerham, other	-	-	-	-	-	1.5	-
<b>Sub-total, Westerham</b>	<b>202</b>	<b>-</b>	<b>192</b>	<b>7,741</b>	<b>1.5</b>	<b>3.7</b>	<b>0.7</b>
<b>New Ash Green</b>							
<b>Town Centre Foodstores</b>							
Co-op, The Row, New Ash Green	449	87%	392	7,741	3.0	6.2	3.2
Other, New Ash Green	-	-	-	-	-	0.3	-
<b>Sub-total, New Ash Green</b>	<b>449</b>	<b>-</b>	<b>392</b>	<b>7,741</b>	<b>3.0</b>	<b>6.5</b>	<b>3.2</b>
<b>Borough Green</b>							
<b>Town Centre Stores</b>							
Co-op, Station Approach, Borough Green	267	95%	253	7,741	2.0	5.1	3.1
Local Shops, Borough Green	-	-	-	-	-	4.1	-
<b>Sub-total, Borough Green main stores</b>	<b>267</b>	<b>-</b>	<b>253</b>	<b>7,741</b>	<b>2.0</b>	<b>9.1</b>	<b>3.1</b>
<b>Overall total for other main centres (Westerham, New Ash Green, Borough Green and Farningham) (D)</b>	<b>917</b>	<b>-</b>	<b>837</b>	<b>7,741</b>	<b>6.5</b>	<b>19.3</b>	<b>-</b>
<b>Overall total (A+B+C+D)</b>	<b>22,127</b>	<b>-</b>	<b>16,959</b>	<b>11,327</b>	<b>192.1</b>	<b>278.1</b>	<b>-</b>

Table 7: Commitments for new convenience goods floorspace

Proposed development	Net convenience floorspace (sq.m)	Company average sales (£/sq.m net)	Average turnover 2020 (£m)	Average turnover 2025 (£m)	Average turnover 2030 (£m)	Average turnover 2035 (£m)
<i>(No convenience goods commitments)</i>	-	-	-	-	-	-
<b>Total</b>	-	-	-	-	-	-

Sevenoaks District Council — Retail Study 2016  
Convenience Capacity Modelling

Table 8a: Sevenoaks urban area convenience goods need

	2016	2020	2025	2030*	2035*
Residents Spending in Sevenoaks main stores (£m)	169.8	176.8	183.2	189.5	193.9
Existing main stores floorspace within Sevenoaks urban area (sq.m net)	10,308	10,308	10,308	10,308	10,308
Sales per sq.m net £	16,477	11,018	11,064	11,111	11,157
Sales from existing floorspace (£m)	169.8	113.6	114.1	114.5	115.0
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	63.2	69.1	75.0	78.8
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,040	12,090	12,141	12,191
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>5,250</b>	<b>5,716</b>	<b>6,175</b>	<b>6,467</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>5,300</b>	<b>5,700</b>	<b>6,200</b>	<b>6,500</b>

Assumes growth in sales efficiency of 0.1% per annum to 2036. \*Figures should be considered indicative and subject to further review throughout Local Plan period

Table 8b: Swanley convenience goods need

	2016	2020	2025	2030*	2035*
Residents Spending in Swanley main stores (£m)	65.7	68.3	70.8	73.3	75.0
Existing main stores floorspace within Swanley (sq.m net)	4,443	4,443	4,443	4,443	4,443
Sales per sq.m net £	14,786	12,462	12,514	12,566	12,619
Sales from existing floorspace (£m)	65.7	55.4	55.6	55.8	56.1
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	13.0	15.2	17.4	19.0
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,040	12,090	12,141	12,191
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>1,077</b>	<b>1,258</b>	<b>1,435</b>	<b>1,556</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>1,100</b>	<b>1,300</b>	<b>1,400</b>	<b>1,600</b>

Assumes growth in sales efficiency of 0.1% per annum to 2036. \*Figures should be considered indicative and subject to further review throughout Local Plan period

Table 8c: Edenbridge convenience goods need

	2016	2020	2025	2030*	2035*
Residents Spending in Edenbridge main stores (£m)	23.2	24.3	25.3	26.1	26.8
Existing main stores floorspace within Edenbridge (sq.m net)	1,371	1,371	1,371	1,371	1,371
Sales per sq.m net £	16,952	10,484	10,528	10,572	10,616
Sales from existing floorspace (£m)	23.2	14.4	14.4	14.5	14.6
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	9.9	10.8	11.7	12.2
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,040	12,090	12,141	12,191
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>823</b>	<b>897</b>	<b>960</b>	<b>1,001</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>800</b>	<b>900</b>	<b>1,000</b>	<b>1,000</b>

Assumes growth in sales efficiency of 0.1% per annum to 2036. \*Figures should be considered indicative and subject to further review throughout Local Plan period

Table 8d: Local Service Centres convenience goods need

	2016	2020	2025	2030*	2035*
Residents Spending in other Sevenoaks District stores (£m)	13.4	20.0	20.7	21.4	21.8
Existing main stores floorspace within Edenbridge town centre (sq.m net)	837	837	837	837	837
Sales per sq.m net £	16,070	7,741	7,773	7,806	7,832
Sales from existing floorspace (£m)	13.4	6.5	6.5	6.5	6.6
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	13.6	14.2	14.8	15.3
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,040	12,090	12,141	12,191
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>1,126</b>	<b>1,178</b>	<b>1,222</b>	<b>1,251</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>1,100</b>	<b>1,200</b>	<b>1,200</b>	<b>1,300</b>

Assumes growth in sales efficiency of 0.1% per annum to 2036. \*Figures should be considered indicative and subject to further review throughout Local Plan period

Table 8e: total convenience need for Sevenoaks District

	2016	2020	2025	2030*	2035*
Residents Spending in other Sevenoaks District stores (£m)	272.2	289.4	300.0	310.3	317.4
Existing main stores floorspace other Sevenoaks District (sq.m net)	16,959	16,959	16,959	16,959	16,959
Sales per sq.m net £	-	-	-	-	-
Sales from existing floorspace (£m)	272.2	189.8	190.6	191.4	192.2
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	0.0	99.6	109.4	118.9	125.3
Sales per sq.m net in new shops (£) <i>Based on large store format</i>	12,000	12,040	12,090	12,141	12,191
<b>Capacity for new floorspace (sq.m net)</b>	<b>0</b>	<b>8,276</b>	<b>9,049</b>	<b>9,792</b>	<b>10,275</b>
<b>Capacity for new floorspace (sq.m net, rounded)</b>	<b>0</b>	<b>8,300</b>	<b>9,000</b>	<b>9,800</b>	<b>10,300</b>

Assumes growth in sales efficiency of 0.1% per annum to 2036. \*Figures should be considered indicative and subject to further review throughout Local Plan period

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Total					
X	0 Aldi, Addlington Road, Selsden	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Aldi, Croxson Road, Amersley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Aldi, London Road, East Grinstead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Aldi, London Road, Rosherville, Gravesend	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Asda, Crook Log, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Asda, Crossways Boulevard, Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Asda, Longfield Road, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Asda, Thames Way, Gravesend	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Asda, The Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Co-operative, Carlton Parade, Orpington	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Co-operative, The Grange, High Street, Westerham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Co-operative, York Parade, Tonbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Lidl, Crofton Road, Locksbottom	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Marks and Spencer, The Fountain Retail Park, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Marks and Spencer, Bluewater, Greenhithe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Marks and Spencer, The Broadway, Bexleyheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Morrisons, Church Walk, Caterham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Morrisons, Coldharbour Road, Gravesend	0.0%	0.0%	0.0%	0.0%	1.8%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Morrisons, James Watt Way, Erith	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Morrisons, New Hythe Lane, Larkfield, Aylesford	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Morrisons, Queensway, Petts Wood	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Morrisons, Welling High Street, Welling	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, Beckenham Road, Clock House	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, High Street, Penge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, High Street, Beckenham	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, High Street, West Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Sainsbury's, Homefield Rise, Orpington	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Sainsbury's, Pallant Way, Orpington	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, Station Road, West Wickham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Sainsbury's, Upper Elmers End Road, Eden Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Bromley Road, Downham, Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Commercial Road, Paddock Wood, Tonbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Tesco Express, Croxson Road, Beckenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, High Street, Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Latona Parade, Gravesend	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Plaistow Lane, Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Southborough, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, St Johns Road, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Westmoreland Road, Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Express, Whitehall Lane, Gravesend	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Extra, Augustas Lane, Orpington	0.0%	1.1%	0.0%	0.2%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Metro, Grosvenor Road, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Superstore, Homesdale Road, Bromley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Tesco Superstore, Woodgate Corner, Pembury, Tunbridge Wells	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Waitrose, Church Road, Paddock Wood	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Waitrose, Croft Road, Crowborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Waitrose, John Lewis, Greenhithe	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Waitrose, Masons Hill, Bromley	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Waitrose, Queensway, Petts Wood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Halstead	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Other outside District	1.1%	0.9%	1.7%	0.5%	0.2%	3.9%	4.3%	6.8%	1.5%	8.1%	1.0%	1.2%	2.3%	1.6%	4.1%	3.9%	2.9%				
X	0 Aldi, Well Road, Maidstone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Lidl, Broadway Shopping Centre, Maidstone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	0 Lidl, Imperial Retail Park, Thames Way, Gravesend	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Local shops, Bexley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Local shops, East Peckham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Local shops, Tonbridge	0.0%	0.0%	0.3%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Sainsbury's, Limsfield Road, Warringham	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	5.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Sainsbury's, Priory Market Place, Priory Shopping Centre, Dartford	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	0 Sainsbury's, Quarry Wood Industrial Estate, Mills Road, Aylesford	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%														

# Agenda Item 9

Other	13	Other in Sevenoaks District - Zone 13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	14	Aldi, St Mary's Road, Swanley	0.0%	0.4%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	10.8%	1.1%	0.2%	1.1%				
X	14	Asda, London Road, Swanley	0.0%	0.2%	0.0%	0.5%	8.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	44.7%	8.7%	2.9%	5.5%				
X	14	Co-operative, High Street, Swanley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.3%				
X	14	Co-operative, The Mill, Horton Kirby, South Darenth, Dartford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	3.2%	0.0%	0.8%				
Other	14	Crockenhill	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	14	Eynsford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	14	Farningham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%				
	14	Hextable	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.1%				
Other	14	Horton Kirby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
Other	14	South Darenth	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%				
X	14	Swanley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	1.6%	0.3%				
Other	14	Other outside District - Zone 14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%				
Other	14	Other in Sevenoaks District - Zone 14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.6%	0.0%	0.1%				
X	15	Aldi, Orchards Shopping Centre, Dartford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	9.1%	0.0%	1.6%				
X	15	Lidl, High Street, Fools Cray, Sidcup	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	2.1%	0.2%	0.4%			
X	15	Tesco Superstore, Edgington Way, Sidcup	0.0%	0.0%	0.0%	0.0%	3.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	9.1%	9.7%	2.8%	2.8%				
Other	15	Other outside District - Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	1.4%	4.0%	0.0%	0.8%			
X	15	Iceland, High Street, Dartford	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.2%	0.0%	1.1%	0.0%	0.0%	0.2%	1.6%	0.0%	0.4%				
X	16	Local shops, Dartford	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.6%	0.6%				
X	15	Sainsbury's, Stadium Way, Dartford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	17.3%	0.0%	3.1%				
	15	Other in Sevenoaks District - Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X	16	Co-operative, Crescent Way, Orpington	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.4%				
X	16	Marks and Spencer, Cray Avenue, Orpington Nugent Park	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	5.6%	0.8%				
X	16	Waitrose, High Street, Orpington	0.0%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.9%	2.3%				
X	16	Orpington	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.5%				
Other	16	Other outside District - Zone 16	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.3%				
	16	Other in Sevenoaks District - Zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X		Internet	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X		Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X		Delivered	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X		(Don't know / varies)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
X		(Nowhere else)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%				
			100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%				

**Planning Advisory Committee Work Plan 2015/16 (as at 5/9/16)**

<b>22 September 2016</b>	<b>17 January 2017</b>	<b>25 January 2017</b>	<b>2 March 2017</b>	<b>Summer 2017</b>
Budget: Review of Service Dashboards and Service Change Impact Assessments (SCIAs)  Local Plan Update  Viability  CIL Governance	Local Plan Update  Green Belt Assessment  Swanley and Hextable Masterplan – for consideration  Landscape Character Assessment and constraints mapping  Climate Change/Renewables		Local Plan Update  Local List Update	



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