

Maidstone EDNS Addendum Final Report

Maidstone Borough Council

April 2021

LICHFIELDS



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1.0

Introduction

- 1.1 Maidstone Borough Council ('MBC') commissioned Lichfields to undertake a focused Addendum to the Borough-wide Economic Development Needs Study ('EDNS') published in April 2020, also produced by Lichfields.
- 1.2 The 2020 EDNS provided a comprehensive evidence base for employment, retail, leisure and town centre needs within the Borough during the period to 2037 and 2042, having regard to the revised National Planning Policy Framework ('NPPF') and Planning Practice Guidance ('PPG').
- 1.3 The purpose of this Addendum is to provide updated economic evidence to help inform decision making and support the preferred spatial strategy and approaches going forward into the draft Local Plan (Regulation 19) which is currently being prepared by MBC. This report partially updates the findings of the 2020 EDNS and should be read alongside it.

Scope of the Addendum

- 1.4 MBC is in the process of preparing a review of the Local Plan, for which Regulation 18b Preferred Approach consultation was undertaken between December 2020 and January 2021. As the Local Plan Review progresses towards Regulation 19 stage, further refinement of the evidence base is now required to reflect the Council's preferred spatial strategy and the changing economic and policy landscape which has evolved significantly since the EDNS was prepared. In particular, it is necessary to consider the impact of the Covid-19 pandemic on the Borough's economy and how this may affect the growth prospects over the new Local Plan period.
- 1.5 In this context, the scope of this Addendum consists of the following:
 - 1 Provide updated commentary on the latest Use Class Order changes and changes to permitted development rights, and the implications this may have on planning for the Borough's economic, retail and leisure future.
 - 2 Consider local impacts associated with Brexit and Covid-19 (as far as currently known) and implications this may pose for employment, retail and leisure sectors and what this means for the Borough's objectively identified floorspace needs over the new Local Plan period.
 - 3 Re-visit future economic growth forecasts for Maidstone set out in the 2020 EDNS and update these economic forecasts to reflect Covid-19 and revised macroeconomic assumptions for the UK economy more widely.
 - 4 Update the Council's preferred employment growth scenario ('scenario 1 – labour demand') from the EDNS and retail floorspace projections to cover the time periods 2022-2037 and 2022-2042 using the latest Experian projections.
 - 5 Provide updated policy recommendations for employment and town centres uses within the Local Plan Review.
- 1.6 All other aspects of the 2020 EDNS remain unchanged.
- 1.7 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the time of preparation in February-April 2021. The accuracy and sources of data derived from third party sources has not been checked or verified by Lichfields.
- 1.8 Due to the timing of the study and its analysis, no specific consideration has been given to the impact of emerging planning reform, although the study does take account of the more immediate changes to the Use Classes Order (UCO) effective from 1 September 2020 and proposed changes to permitted development rights from 1 August 2021.

2.0

Implications of Recent Economic and Policy Changes

2.1

Reflecting the changing economic and policy landscape since the EDNS was prepared, this section provides a focused review and analysis of the key implications posed by changes to the UCO and upcoming changes to permitted development rights with regard to planning for the Borough's economic, retail and leisure future. Drawing on the latest intelligence, data and insight, it also considers local consequences and impacts associated with the UK's changing trading relationships with Europe and the ongoing Covid-19 pandemic and economic crisis upon the growth potential of the Borough's employment, retail and leisure sectors.

Implications of Covid-19 and Brexit

Economic Growth and Employment Uses

2.2

The outbreak of Covid-19 and resulting pandemic has developed rapidly with far reaching impacts on the economy and business across the country. Lockdown measures have led to unprecedented shut downs of large parts of the economy simultaneously, with effects being transmitted rapidly across most sectors. While restrictions remain in place, and may do so for some time, it is difficult to anticipate the full extent of the economic shock at the time of writing. Various macro scenarios and forecasts continue to emerge to help understand the potential outcomes and impacts of Covid-19 on the UK economy, and we examine local implications of these for Maidstone as part of this EDNS Addendum.

2.3

Analysis undertaken by Lichfields as part of preparation of a new Economic Development Strategy for Maidstone shows that the outbreak of Covid-19 has had a significant effect on the Borough's economy, with impacts still unfolding as the economic disruption continues:

- Many of the Borough's businesses continue to experience severe disruption to day-to-day operations, and a negative impact from the pandemic on sales/revenues and future orders.
- Across the local economy overall, over a quarter of Maidstone's working residents had been furloughed through the Coronavirus Job Retention Scheme (JRS), and while local unemployment has risen sharply, the full effects are likely to be masked by the extension of government support schemes such as the JRS.
- Visits to retail, recreation and workplace venues are still significantly lower than 'normal', posing economic challenges for Maidstone town centre in particular.
- The impact on individual sectors has varied significantly reflecting the extent to which lockdown measures and ongoing restrictions have forced some industries to temporarily 'shut down'. Around one quarter of Maidstone's local employment, output and business base fall within sectors at highest risk from short term economic harm from Covid-19; hospitality, recreation and retail have been amongst those sectors hardest hit but have also driven much of the job growth recorded in the Borough over recent years and remain locally significant.
- Covid-19 forecasts from Experian (prepared in Summer 2020) imply a short term economic impact equivalent to £575 million across the Borough during 2020. More recent forecasts from December 2020 (considered as part of this EDNS Addendum) suggest that job losses could amount to 2,800 across the Borough between 2020-2021, taking until 2022 for the local economy to recover to pre Covid-19 levels of economic activity.

- 2.4 The ‘real time’ nature of the evolving economic situation emphasises the need to keep on top of data and intelligence as it emerges, to monitor impacts as they unfold, and use this to review the Council’s economic development response on a timely basis.
- 2.5 With regards to planning for economic growth and employment space, it is arguably still too early to understand how the pandemic and resulting structural changes may affect how businesses operate and the resultant demand for employment land. Notwithstanding the ongoing uncertainty, it is likely that the Covid-19 pandemic will induce and accelerate some key structural economic changes that will influence patterns of local economic growth and development, some of which are summarised below:
- **Growth of key sectors:** based on the economic response to Covid-19 over the last year, there are a number of sectors (summarised below) that appear to face particular growth opportunities as the UK embarks on recovery and moves to a post-Covid-19 economy.
 - **A shift from larger cities:** public transport represents one of the key barriers to a full return to the workplace. Allied with increased demands for public and private open space, together with more general issues relating to the affordability of housing, it is possible that an increasing number of people will look to relocate away from London and other large cities to locations that offer other quality of life factors. A shift towards greater levels of home-working may facilitate this. Areas such as Maidstone Borough which balance an attractive environment, strong community, robust economy and strong transport links could be well placed to benefit from these economic drivers.
 - **Increased home-working/reduced office demand:** in the short-term, ongoing social distancing requirements will mean that fewer people will be able to work from formal office spaces. In the medium to longer term, people might look to the success of home working as a justification to shift to new working arrangements on a more permanent basis. This may reduce the overall demand for office space and trigger a shift in occupier requirements for more flexible workspace that enables employees and partners to come together to collaborate and share ideas.

Table 2.1 Covid-19: Key sector growth opportunities

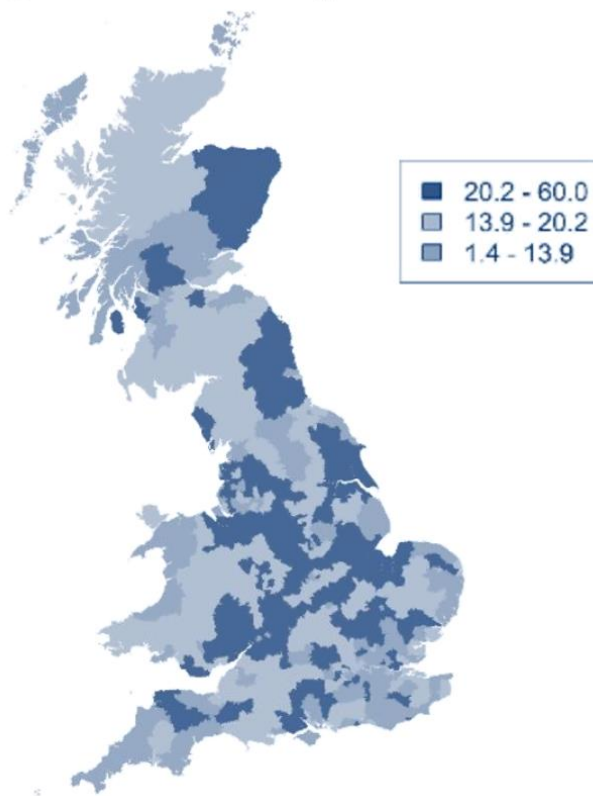
Sector	Rationale
Health / life-sciences / med-tech	Covid-19 has fundamentally been a health crisis. It has been fought by front-line health workers and its resolution lies in a health solution. Significant investment has been made in life-sciences to develop a vaccine and it is likely that there will be a greater focus on this sector in future in terms of both public and private investment.
Logistics	The logistics sector has been instrumental in keeping the country and its economy operational through the pandemic and it is likely that this will also be given a greater emphasis in the future. This may particularly be the case if some decentralisation of population and economic activity does occur.
Energy / Environmental	Building back a green and resilient recovery lies at the heart of the government’s Covid-19 policy response, recognising the opportunity the pandemic provides to shift to a greener economy and support wider sustainable development goals. Specific proposals include increased investment in low carbon innovation and industries; focusing on those sectors that can support the environment; and ensuring that companies receiving government support are operating in a manner consistent with climate goals.
IT / Communications	Home working and social restrictions have required us to look to technology to a much greater degree. It is likely that online/teleconferencing platforms will continue to grow after Covid-19 passes. Similarly, increased home working and growth in key sectors such as life-sciences, green energy and logistics will all rely on continued advances in IT.
Tourism / Hospitality	Although this sector has faced some of the most substantial economic disruption so far, there is the potential that it will grow significantly, particularly if people remain cautious about international travel and choose to holiday in Britain instead for the foreseeable future.

Source: Lichfields analysis

- 2.6 These ongoing structural changes present both challenges and opportunities for places like Maidstone Borough which has traditionally accommodated a healthy office market, as Kent's county town, but has struggled to retain this market over recent years (partly as a result of the introduction of office-to-residential PDR). The Borough stands to benefit from a shift towards more localised working patterns should home-working and agile working become more prominent, and the emerging life sciences cluster developing around the Kent Medical Campus also leaves Maidstone well placed to capture future growth opportunities accelerated by the Covid-19 pandemic and public health response.
- 2.7 The Brexit deal agreed with the EU in December 2020 avoided further economic challenges associated with a 'no-deal' Brexit, however it is still early days and there remains considerable uncertainty regarding macro and local economic impacts from the trade agreement and the UK's future trading relationship with the EU. There is evidence of ongoing friction in trade and travel with Europe as different sectors of the economy work through the practicalities of the new trading arrangements and restrictions. This could pose key challenges to any business that trades with or via Europe, regardless of their location within the country.
- 2.8 Areas with a large presence of 'high Brexit risk sectors' are likely to be most exposed to short term impacts, typically with strong local reliance on sectors such as manufacturing, wholesale, fuel refining, extraction and mining, insurance and air and water transport. Recent analysis by Experian suggests that Kent as a whole has relatively limited exposure to these highest risk sectors, with less than 14% of Maidstone's local GVA (economic output) concentrated within those sectors considered to be at highest Brexit risk (Figure 2.1).

Figure 2.1 Local Area Brexit Risk

% of GVA concentrated in 'high risk' sectors



Source: Experian 2021

Retail and Leisure Uses

- 2.9 As indicated in the EDNS 2020, historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Experian's pre-Covid forecasts suggested slower expenditure growth overall but with home shopping/internet spending growing at a much faster rate than traditional shopping. Experian's latest short-term expenditure growth projections (2020 and 2021) for retail and leisure now reflect Brexit and the Coronavirus pandemic.
- 2.10 The main implications of Brexit and the Covid-19 crisis for the Local Plan evidence base are likely to be as follows:
- 1 Impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
 - 2 Short term impacts on the mix of uses and customer behaviour that are likely to distort the base year position; and
 - 3 Longer terms structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.
- 2.11 The key uncertainties relating to the first two points are primarily the length of the Covid-19 crisis and likely recovery period. The longer term structural implications are harder to predict and quantify at this early stage.
- 2.12 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short term supply chain disruption could lead to inflationary pressure, which may have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There is likely to be a longer term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 2.13 These trends suggest, following the Covid-19 crisis, there is likely to be a spike in town centre vacancies with some businesses failing to re-open, particularly non-food retail operators and restaurants. Many national operators have already announced job losses and store closures.
- 2.14 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the plan period within five year interval projections, development plan policy should assume population projections will return to projected levels by 2023. The first interval population projections at 2023, and certainly later years, should not be significantly affected by the Covid-19 crisis.
- 2.15 Office for National Statistics (ONS) monthly sales volume information for Great Britain indicates total retail sales volumes were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the July and August 2020 sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in November 2020, although still 3% above pre-Covid levels.
- 2.16 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April, whilst the food sector experienced 10% growth in sales during March in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to November 2020.

- 2.17 ONS data suggested on-line retail sales peaked at over 50% higher in June 2020 compared with February 2020. The latest figures for July to November 2020 have been consistently around 40% higher than the pre-Covid sales in February 2020.
- 2.18 Food store on-line sales doubled during May and June but still represent a relatively small proportion of total sales in this sector, reaching about 11%; it remained over 10% during July to November 2020. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April, reaching 44% of sales. On-line sales in this sector remain over 50% higher than pre-Covid levels.
- 2.19 These Covid-19 affected trends are likely to continue during lockdown. It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post first lockdown data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.20 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends. These longer term forecasts should be monitored and kept under review.
- 2.21 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted.
- 2.22 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2026). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Maidstone is likely to relate to population growth or qualitative areas of deficiency.
- 2.23 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.24 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

"After easing in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040."
- 2.25 The floorspace capacity assessment in this Addendum continues to make an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is

made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Changes to the Use Class Order

- 2.26 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the revised NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.27 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. The Covid-19 crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 2.28 On 1 September 2020, the planning Use Classes Order (UCO) was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail. Temporary changes to permitted changes of use up to at least July 2021 will provide further flexibility.
- 2.29 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service uses);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community uses).
- 2.30 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.31 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.32 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.33 The previous distinction between Class A3, A4 and A5 uses will now become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the

Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis.

- 2.34 The potential implications of permitted changes in uses outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies. It also means that Class E will affect any buildings within the relevant uses, including those within the former B1 Use Class outside of town centres within designated employment areas.
- 2.35 This EDNS Addendum has been prepared in line with the Planning Practice Guidance (PPG) and the methodology for determining future economic development needs, which at the time of drafting remains unchanged despite the introduction of the new Class E. The original EDNS report refers to “B1 uses”, which under the new Use Classes Order have changed as follows:
- Former Class B1(a) to E(g)(i);
 - Former Class B1(b) to E(g)(ii); and
 - Former Class B1(c) to E(g)(iii).
- 2.36 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were recently published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.
- 2.37 A new Class MA business and commercial to residential permitted development right will replace and introduce certain commercial to residential permitted development rights from 1 August 2021. The new class MA will be different to the current retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.38 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PDRs are subject to floorspace, vacancy and location limitations.
- 2.39 Class MA will allow many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.40 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty will be excluded from the new PD rights. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the current Class M PD right will fall away.

- 2.41 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, will benefit from the Class MA PD rights.
- 2.42 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.
- 2.43 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval, but periods of closure as a result of Government Covid-19 restrictions will not count towards the vacancy period where the building continues to be occupied by the owner or tenant. A key change arising from Class MA will be the loss of a prior approval matter considering the impact of the loss of retail.
- 2.44 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.45 The requirement to meet space standards will come into force. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard.
- 2.46 These changes will also influence how Maidstone Borough plans for future employment needs and the appropriate policies that need to be put in place. We summarise below some of the potential implications which will need further detailed consideration in due course:
- 1 Existing policies to protect employment space will become less effective where these relate to existing B1(a/b/c) premises, because there will no longer be the same planning mechanism to control these from switching to other forms of retail, leisure, community and potentially residential use. Over time, this could potentially alter the composition of existing employment areas and reduce the supply of existing employment space, particularly in those locations within the Borough that face pressure from other Class E uses.
 - 2 Similarly, former B1 allocations could face delivery challenges. However, local planning authorities may still be able to place restrictions on use at the planning application stage. Conversely, it may also now be easier for developers to be flexible to accommodate supporting on-site facilities such as convenience retail, gyms and other supporting uses as part of industrial estates/business park developments given they are now all contained within the same use class – provided these uses are proportionate, that could be helpful in making these locations more attractive to the market and potential occupiers or supporting viability challenges where they exist.
 - 3 Alongside the changes to the Use Classes Order, the new Class MA permitted development right due to come into force in August 2021 may exert further pressure on B1a/b/c for conversion and potential replacement of older buildings for residential where the criteria can be met. This may be particularly the case when combined with a weaker office market

outlook in the near-term at least due to the Covid-19 pandemic. The Council could still opt to introduce an Article 4 Direction to withdraw these rights across a defined area if they can demonstrate this is justified, albeit Article 4 Directions removing Class O permitted development rights will only continue to apply until 31 July 2022.

- 4 It may be advisable for the Council to prepare an up-to-date assessment of B1 stock in the Borough to examine the nature, geographical distribution and occupancy levels of these uses. This could help inform a risk assessment of how much of the area's existing office, R&D and light industrial space portfolio could potentially be lost to other Class E uses through permitted changes of use, as well as the extent of PDR for conversion/replacement to C3 residential. This exercise would also help develop an understanding of the distinction between ex-B1c and B2 (i.e. light and general industrial), and whether in practice these represent different market segments locally. In turn, this analysis could also help to build an evidence base for conditioning future planning applications and policies in the Local Plan.
- 5 Finally, the Council should consider how the changes might be used to positively contribute to the future supply of office, R&D and light industrial space. For example, the conversion of vacant retail warehousing space to light industrial uses could provide an alternative form of supply to help address business needs in the Borough over the new Plan period.

3.0 Requirements for Employment Space

- 3.1 This section updates the labour demand future growth scenario presented in the EDNS ('scenario 1') drawing on the latest local level economic forecasts for Maidstone Borough in order to consider short and longer term effects of the Covid-19 pandemic upon economic growth prospects for the Borough over the Local Plan period.
- 3.2 It provides a partial update to the range of economic scenarios considered by the EDNS to reflect the baseline labour demand scenario, which forms the Council's preferred employment scenario within the Local Plan Review.
- 3.3 Outputs from the updated scenario are presented for two different time periods as follows:
- 1 The new Local Plan period 2022-2037; and
 - 2 An extended Local Plan period 2022-2042 (to allow for potential delays in Plan adoption).

Forecasts of Job Growth

A. Experian Forecasts: September 2019

- 3.4 The Maidstone EDNS considered a 'baseline job growth' scenario that used forecasts of employment growth prepared by Experian, based on their September 2019 release. These took account of regional and national macroeconomic assumptions prevailing at the time.

2022 to 2037

- 3.5 Over the period from 2022 to 2037, the 2019 Experian employment projections indicated for Maidstone Borough:
- **Total workforce job growth:** 11,200, equivalent to 747 jobs per annum on average; and
 - **B class (office, industrial and warehousing) job growth:** 3,210, equivalent to 214 jobs per annum.

2022 to 2042

- 3.6 Over the extended Plan period from 2022 to 2042, the 2019 Experian employment projections indicated for Maidstone Borough:
- **Total workforce job growth:** 15,520, equivalent to 776 jobs per annum on average; and
 - **B class (office, industrial and warehousing) job growth:** 4,520, equivalent to 226 jobs per annum.
- 3.7 The majority of B class job growth was shown to be driven by office-based sectors, with both B8 and industrial activities expected to account for a small share of job growth.

B. Experian Forecasts: December 2020 (Covid-19 Forecasts)

- 3.8 Following the outbreak of Covid-19 in March 2020, more up-to-date forecasts have been obtained from Experian in order to consider the potential impact of the Covid-19 pandemic on the Borough's economy, both in the short term and the effect on its forecast growth over the longer-term Plan period. Local level employment forecasts were obtained from Experian's December 2020 release (the latest available at the time of analysis) which are consistent with Experian's November 2020 UK macro forecast. These projections reflect a 'Delayed-V-shape' recovery scenario, which represents Experian's base case. Further detail on Experian's key assumptions is summarised overleaf.

Experian Scenario Assumptions: November/December 2020

The latest national accounts data confirm that, since lockdown began in March, the economy has suffered an unprecedented contraction, with a record fall of 20.4% on the quarter, in 2020 Q2, though also faced a record expansion of 16% in 2020 Q3, leaving GDP around 9% below pre-Covid levels. The gradual reopening of businesses as well as government measures to stimulate the hospitality sector had seen growth return in the summer months. However, sustained government health measures, such as lockdowns and tiered restrictions aimed at suppressing the virus (curfews, increased fines) in response to a surge in Coronavirus cases, has stymied the recovery.

For now, our view is that any emerging recovery will be gradual in the near-term, contingent on the success of the vaccine roll-out as well as high take-up throughout the year. The pace of growth will also be curbed by ongoing supply side constraints as businesses maintain social distancing measures and operate under restricted trading hours throughout (at the very least) the first half of 2021. On the demand side, consumers will remain cautious about venturing out against a backdrop of rising cases and the potentiality of new variants of Covid-19 entering the UK. The squeeze on incomes from the rise in unemployment and furloughing will also dampen confidence and willingness to spend.

GDP is likely to shrink in 2021 Q1, with a third lockdown in place for at least 6 weeks in January 2021, the near-term outlook is poor. We expect 2021 to be a difficult year, with the recovery pushed into 2022. Our forecast is for GDP growth of around 6% pa over 2021-22. Under these forecasts, GDP does not return to end-2019 levels until end-2022.

The predominant risk continues to centre around the pandemic. New variants are a key concern and also future easing in restrictions raises the risk of a resurgence in the virus, with local flare-ups leading to a localised form of lockdown. If such flare-ups manifest nationwide, as government support to businesses and households unwinds, there is a real risk of a prolonged recession. This could see the unemployment rate and business insolvencies spike even higher and potentially lead to greater long-term scarring to the economy.

- 3.9 Notwithstanding the greater than usual degree of uncertainty and variability attached to the most recent forecasts, they are useful to consider and contrast with the 2019 forecasts presented above to provide an initial 'stress test' of the moderating effect the pandemic may have on the overall level and rate of job growth in Maidstone over the Plan period. However, they may need to be re-considered closer to the Local Plan examination stage depending on how the economic situation changes in the intervening period.

Implied Employment Change

- 3.10 Tables 3.1 and 3.2 show employment change implied by the latest Experian forecasts by office and industrial uses as well as total employment change for each time period. This includes an allowance for jobs in other sectors that typically use office, industrial or warehousing space.

Table 3.1 Forecast Employment Change in Maidstone, 2022-2037

Use	Number of Workforce Jobs		Change (2022-2037)
	2022	2037	
Office [¥] Jobs	15,840	18,455	+2,615
Industrial* Jobs	10,635	11,450	+815
Warehouse (B8) Jobs	7,850	8,585	+735
Total Office, Industrial & Warehousing Jobs	34,325	38,490	+4,165
Total Workforce Jobs	91,200	104,400	+13,200

Source: Experian (December 2020) / Lichfields analysis (totals rounded)

¥ Formerly use classes B1a and B1b, now falls within Class E

* Includes use class B2 and former use class B1c (now falls within Class E)

Table 3.2 Forecast Employment Change in Maidstone, 2022-2042

Use	Number of Workforce Jobs		Change (2022-2042)
	2022	2042	
Office [¥] Jobs	15,840	19,605	+3,765
Industrial* Jobs	10,635	11,825	+1,190
Warehouse (B8) Jobs	7,850	8,960	+1,110
Total Office, Industrial & Warehousing Jobs	34,325	40,390	+6,065
Total Workforce Jobs	91,200	109,685	+18,485

Source: Experian (December 2020) / Lichfields analysis (totals rounded)

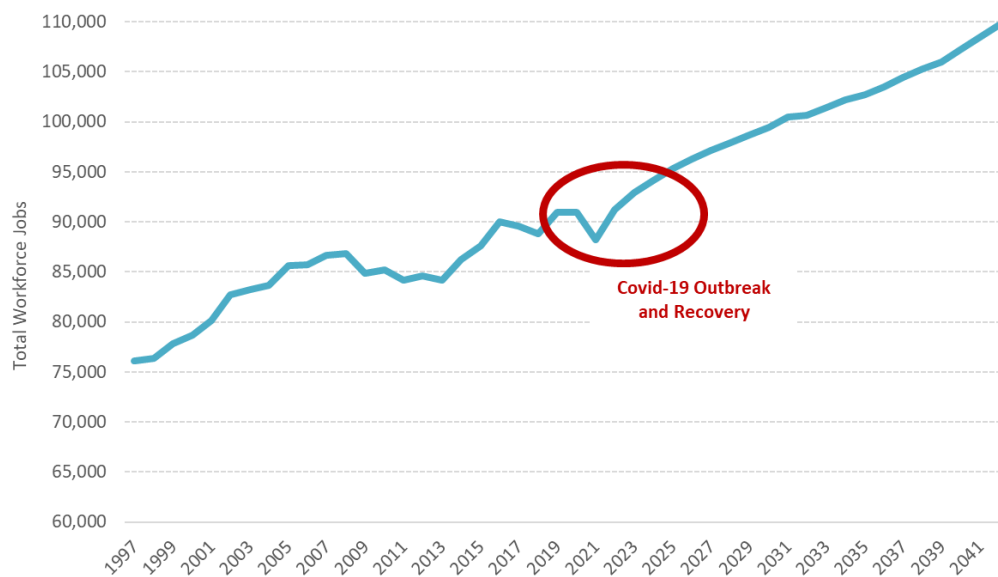
Note: Experian forecasts run to 2040, so 2041 and 2042 employment figures have been estimated by Lichfields based on average workforce job growth rate in Maidstone between 2022 and 2040 by sector

¥ Formerly use classes B1a and B1b, now falls within Class E

* Includes use class B2 and former use class B1c (now falls within Class E)

- 3.11 Under this scenario, the majority of office, industrial and warehousing job growth continues to be driven by office-based sectors, with B8 and industrial activities again expected to account for a small share of job growth.
- 3.12 Figure 3.1 illustrates the trajectory of total job growth implied by the latest Experian forecasts for Maidstone Borough. Under this scenario, workforce jobs are expected to remain stable between 2019 to 2020, and then decline by 2,800 (3.1%) during the course of 2021 as labour market effects of the Covid-19 pandemic are felt across the Borough, and current job protection schemes (namely the Coronavirus Job Retention Scheme) are withdrawn. The Borough's workforce job base is expected to recover to pre-pandemic levels by 2022, with steady growth then predicted for the remaining years of the Local Plan period to 2037/2042.

Figure 3.1 Forecast Employment Growth in Maidstone to 2042: Total Workforce Jobs

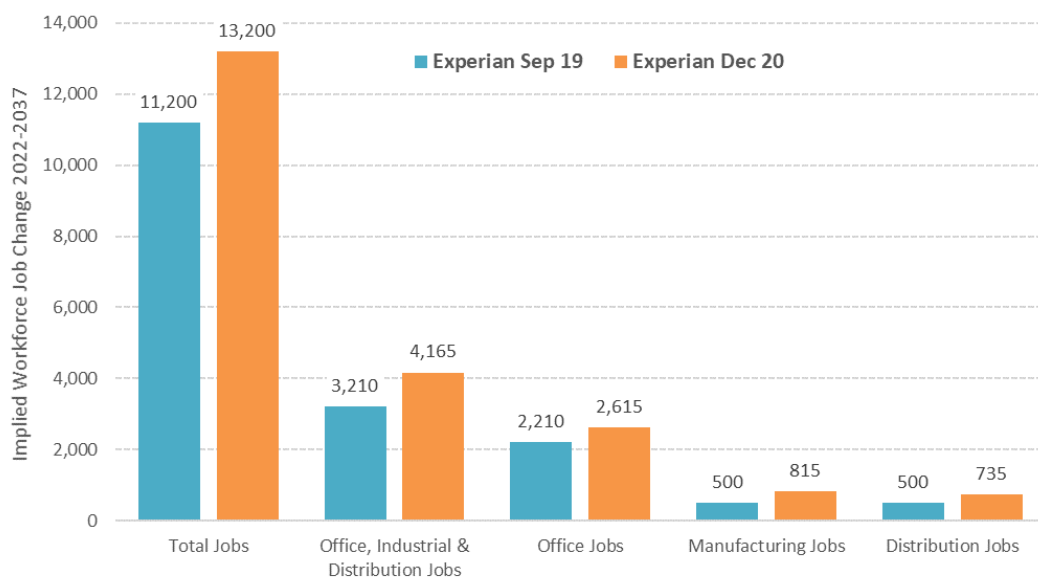


Source: Experian (December 2020) / Lichfields analysis

3.13

The latest Experian forecasts imply higher overall levels of employment growth for Maidstone Borough over the Local Plan period 2022 to 2037 when compared with the previous (September 2019) vintage used as part of the EDNS. This overall pattern is echoed for office and industrial jobs, as shown in Figure 3.2 below.

Figure 3.2 Comparison of Experian forecasts: Change in Workforce Jobs (2022-2037)



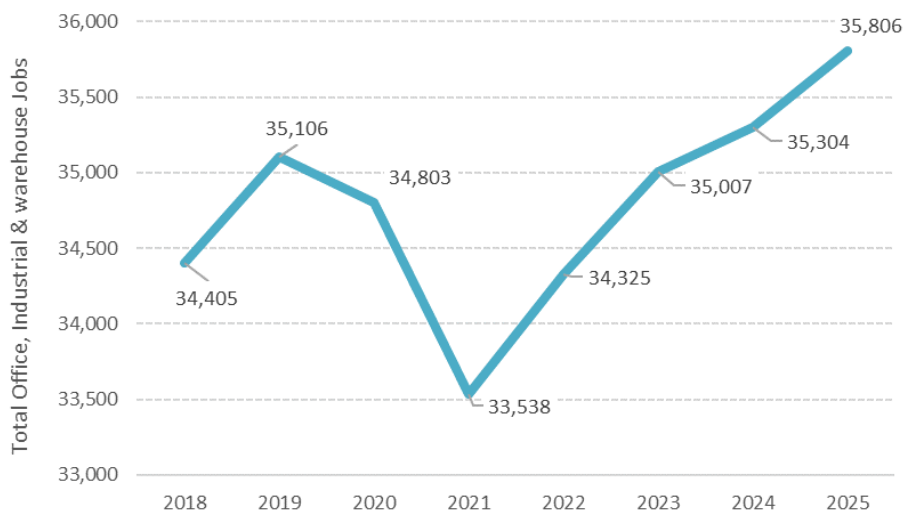
Source: Experian (September 2019 and December 2020) / Lichfields analysis

3.14

It should be noted that the December 2020 Experian forecasts are 'rebased' compared with the September 2019 vintage, and imply a total workforce jobs base in Maidstone Borough of 91,200 in 2022 (compared with 92,500 under the September 2019 forecasts). This is likely to reflect the short term impact of Covid-19 upon the Borough's economy, with job losses associated with the economic disruption reducing the overall scale of Maidstone's employment base as at 2022.

- 3.15 By 2037, both sets of forecasts imply a very similar workforce jobs base for Maidstone (104,400 under the December 2020 forecasts and 103,700 under the September 2019 forecasts) with a difference of just 700 jobs between them.
- 3.16 This means that most of the increase in job growth over the 2022 to 2037 Local Plan period implied by the December 2020 Experian forecasts can be explained by a Covid-19 ‘catching up’ and recovery effect at the beginning of the study period, with longer term growth prospects largely unchanged across the two datasets.
- 3.17 A closer look at the sectors expected to see the most significant short term disruption and job losses as a result of Covid-19 in the Borough identifies retail and hospitality as those sectors anticipated to see the largest absolute job losses during 2020-21, alongside professional services. Many sectors that traditionally use office, industrial and warehousing space are forecast to see job losses between 2020 and 2021, as shown in Figure 3.3 below.

Figure 3.3 Forecast Employment Growth in Maidstone: Total Office, Industrial and Warehouse Jobs



Source: Experian (December 2020) / Lichfields analysis

- 3.18 The 2020 forecasts provide a necessary sensitivity check at the current time but are, invariably, subject to a high degree of variability given the evolving nature of the pandemic at the time of preparation. Outputs from the forecasts therefore need to be treated with caution given the uncertainty (and therefore significant caveats) associated with them. Nonetheless, Experian’s latest forecasts - that factor in both short and longer term impacts from Covid-19 - suggest a very similar medium to longer term job growth trajectory over the new Local Plan period for Maidstone Borough to its pre-Covid forecasts and are therefore broadly consistent with the September 2019 forecasts used to inform the EDNS.

Converting to Employment Land Requirements

- 3.19 The office, industrial and warehousing part of these employment growth forecasts are converted to future employment space requirements by applying the latest published job density figures for employment space, which take account of recent trends in occupancy for the different employment uses. The following average ratios have been applied, consistent with the EDNS:
- **Offices:** 1 workforce job per 12.5 sqm for general office space;
 - **Industrial:** 1 workforce job per 45 sqm as an average across general and light industrial uses; and
 - **Warehousing:** 1 workforce job per 65 sqm for general, smaller scale warehousing (assumed to account for 80% of warehousing stock in Maidstone) and 1 workforce job per 80 sqm for large scale, lower density units (assumed to account for 20% of total stock).
- 3.20 An allowance of 10% is added to all positive floorspace requirements to reflect ideal levels of market vacancy in employment space.
- 3.21 These floorspace requirements also include a 10% 'buffer' allowance for such factors as delays in development sites coming forward, replacement of some ongoing losses of employment space during the Local Plan period, and other relevant factors in the local market. Again, this is consistent with the EDNS methodology.
- 3.22 These floorspace figures are then translated into land requirements for office, industrial and warehousing uses, taking account the total land/site area typically needed to accommodate these uses, factoring in requirements relating to premises, car parking, space for lorry turning, landscaping etc. The following plot ratio assumptions are applied to the floorspace estimates presented above to reflect the pattern of development in Maidstone:
- **Industrial & Warehousing:** a plot ratio of 0.4 is applied so that a 1.0 ha site would be needed to accommodate a footprint of 4,000 sqm of employment floorspace; and
 - **Offices:** assumed that 30% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 70% in higher density urban/town centre locations at a plot ratio of 2.0.
- 3.23 The resulting 'gross' floorspace and land requirements are set out in Table 3.3 below.

Table 3.3 Gross Employment Space and Land Requirements (2022-2037 and 2022-2042)

Use	2022 to 2037		2022 to 2042	
	Floorspace (GEA sqm)	Land (ha)	Floorspace (GEA sqm)	Land (ha)
Offices (Class E)	39,520	4.3	56,930	6.3
Industrial (B2 & Class E)	44,320	11.1	64,905	16.2
Warehouse (B8)	56,270	14.1	84,830	21.2
Total Office, Industrial & Warehouse	140,110	29.5	206,665	43.7

Source: Lichfields analysis (totals rounded)

- 3.24 The employment floorspace and land requirements indicated by the December 2020 Experian forecast are around 40% higher than those resulting from the September 2019 forecast included in the EDNS, reflecting the higher overall level of job growth implied by the latest projections over the Local Plan period between 2022 and 2037 (and 2042).

- 3.25 Industrial and warehousing uses account for most of this increase in floorspace and land requirement between the two sets of forecasts, with the latest Experian forecasts implying a comparatively stronger job growth outlook for industrial and warehousing sectors over the period to 2037/2042 (see also Figure 3.2). Because these uses are comparatively 'land hungry', this increases the overall employment floorspace requirement quite significantly. The increase in office jobs and therefore floorspace is more modest by comparison.
- 3.26 As noted in earlier commentary, most of the increase in job growth over the 2022 to 2037 Local Plan period implied by the December 2020 Experian forecasts can be explained by a Covid-19 'catching up' effect at the beginning of the study period as sectors that experience job decline as a result of the pandemic gradually recover to pre-pandemic levels of economic activity. This includes a number of sectors locally that use office, industrial and warehousing space, and whilst job losses may occur within these sectors over the short term, it is unlikely that workspace associated with these jobs will be 'lost' at the same pace. This means that some of Experian's projected job growth within office, industrial and warehousing sectors over the first few years of the Local Plan period may not require additional employment floorspace capacity. This could have the effect of artificially inflating the scale of employment floorspace requirement that actually needs to be accommodated within the Borough over the Plan period and suggests that the updated floorspace and land requirements summarised in Table 3.3 above may exaggerate the true quantum of 'economic need' arising within the Borough over this time.

Demand/Supply Balance

- 3.27 The updated Experian labour demand scenario, and associated forecasts of future employment space requirements in Maidstone Borough, can be compared with the latest position in terms of identified employment land supply in the Borough, to determine the level of need for employment land over the new Local Plan period.

Pipeline Supply

- 3.28 The supply of employment space in the development pipeline comes from:
- 1 Sites that have been allocated for either employment uses or mixed-use development through the Maidstone Borough Local Plan (policies EMP1 and RMX1 respectively) and which have employment capacity remaining;
 - 2 Sites that are proposed for allocation through the Local Plan Review ('Preferred Approaches – Regulation 18b'), including as part of two new proposed garden settlements; and
 - 3 Extant planning permissions for B class development on sites across the Borough.
- 3.29 The Council's latest monitoring data (as at February 2021) provides information on planning permissions and land availability within each of these categories. Based on this information, the total space available to help meet future needs in Maidstone Borough is estimated to comprise 237,430 sq.m of employment space in net terms, as shown in Table 3.4 overleaf.

Table 3.4 Supply of Employment Floorspace in Maidstone Borough (at February 2021 – latest available position)

Source		Employment Space Supply (sq.m)				
		Office	Industrial	Warehousing	Mixed	Total
Existing Employment Allocation	EMP1 (1) West of Barradale Farm				3,564	3,564
	EMP1 (2) South of Claygate, Marden				4,084	4,084
	EMP1 (4) Woodcut Farm, Bearsted				49,000	49,000
Existing Mixed-Use Allocation	RMX1 (1) Newnham Park, Maidstone	21,270				21,270
	LPRSA146 [RMX1(2)] Maidstone East	10,000				10,000
	LPRSAEmp1 [RMX1(4)] Syngenta				46,000	46,000
	LPRSA151 [RMX1(6)] Mote Rd	2,000				2,000
	LPRSA145 Len House	530				530
Proposed Allocation (Preferred Approaches - Regulation 18b)	LPRSA147 Gala Bingo & Granada House	200				200
	LPRSA148 [RMX1(5)] Maidstone Riverside	5,148				5,148
	LPRSA149 Maidstone West	1,034				1,034
	LPRSA009 Right Kard	37				37
	LPRSA053 12-14 Week Street	81				81
	LPRSA144 High Street/Medway Street	56				56
	LPRSA150 Mill Street Car Park	358				358
	LPRSA078 Haven Farm, SV	375				375
	LPRSA260 Ashford Rd, Lenham				3,108	3,108
	LPRSA273 Land between Maidstone Rd & Whetsted Rd				41,023	41,023
	LPRSA285 Dickley Court, Lenham	188				188
	Lidsing Garden Settlement*				16,917	16,917
	Heathlands Garden Settlement**				30,707	30,707
Extant planning permissions (i.e. not started)		7,543	-5,828	35		1,750
Total		48,820	-5,828	35	194,403	237,430

Source: Maidstone Borough Council / Lichfields analysis (totals rounded)

* Assumed 50% of total floorspace to be delivered during plan period – figure is indicative and based on broad Council assumptions, not on site promoter information

** Assumed 35% of total floorspace to be delivered during plan period– figure is indicative and based on broad Council assumptions, not on site promoter information

3.30

The majority (82%) of this supply is expected to accommodate a mix of employment uses so is relatively flexible in nature. Just over a fifth (21%) relates to office uses while industrial supply is negative reflecting extant planning permissions that would remove industrial supply from the Borough's stock if implemented in full. Warehousing uses account for a very small share at just 35 sq.m.

- 3.31 Existing mixed-use site allocations are expected to make the largest contribution to future supply at around 33% of total supply, with much of this pipeline supply concentrated within a small number of relatively large sites including the former Syngenta works and Newnham Park (Kent Medical Campus).
- 3.32 Existing employment allocations, proposed allocations and the two proposed garden settlements are expected to make similar sized contributions to future supply, at 24%, 22% and 20% respectively, with extant planning permissions accounting for less than 1% of total supply.
- 3.33 In geographical terms, the pipeline supply of employment space is distributed right across the Borough. The two sites at Woodcut Farm and Newnham Park (together representing 30% of supply) are located on/near to the edge of Maidstone town and in close proximity to the M20 strategic corridor, which represents the Borough's premier market location. Around 8% is located within Maidstone town (including various sites across the town centre) and 20% within the two proposed garden settlements at Lidsing and Heathlands; the former located adjacent to Medway urban area, the latter located within a comparatively more untested market location. The remaining supply is distributed across some of the Borough's smaller settlements such as Marden, Headcorn and Lenham.
- 3.34 At 237,430 sq.m, the pipeline employment supply has significantly increased in scale from the position in the EDNS (where it totalled just under 126,000 sq.m). This reflects the inclusion of a number of proposed allocations within the Local Plan Review.

Demand/Supply Balance

- 3.35 A broad comparison of estimated demand for employment space against currently identified supply, as shown in Table 3.5, implies that Maidstone Borough would have sufficient employment space in quantitative terms to meet the needs arising from the updated Experian labour demand scenario, over the Local Plan period to 2037 (and also to 2042).

Table 3.5 Demand/Supply Balance of Employment Space in Maidstone Borough

	2022 to 2037	2022 to 2042
Gross requirement for employment space (GEA sq.m)	140,110	206,665
Available Employment Space (sq.m)	237,430	
Surplus (sq.m)	+97,320	+30,765

Source: Lichfields analysis

- 3.36 Beyond this overall comparison, the analysis suggests that the pipeline supply of 48,820 sq.m office space would be sufficient in quantitative terms to accommodate the identified requirement for office floorspace over the period to 2037 (of 39,520 sq.m). It is also likely that the 194,403 sq.m of mixed employment space will deliver an element of office use, providing further flexibility and choice for future occupiers.
- 3.37 The residual industrial and warehousing requirement of c.100,000 sq.m over the period to 2037 could be fulfilled by the significant quantum of mixed supply (194,403 sq.m) assuming that much of this comes forward and is delivered over the plan period.

4.0 Requirement for Main Town Centre Uses

- 4.1 This section re-assesses the need for Class A1 retail, Class A3 to A5 food/beverage and Class D2 leisure uses within Maidstone Borough. It objectively assesses the quantitative and qualitative scope for these uses for the period 2019 to 2042.

Study Area Population and Expenditure

- 4.2 As in the EDNS the study area is sub-divided into six zones. However, two garden settlements are now proposed at Lidsing to the north of the Borough and at Heathlands to the east of Maidstone. These two proposals lie within Zone 2 but will attract their own shopping and leisure patterns in the future.
- 4.3 The study area population for 2019 and projections to 2042 are set out in Table 1 in Appendix 1. Population data has been obtained from Experian, which is based on the ONS 2018 based projections. Population within the study area is 567,012 in 2019, which is expected to increase by +77,406 people by 2042. The EDNS 2020 population projections suggested higher growth during this period (+118,449).
- 4.4 Experian's local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2019 have been obtained. Expenditure and turnover figures in this Addendum are at 2019 prices and are not directly comparable with figures in the EDNS 2020 (based on 2017 prices).
- 4.5 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 18 - October 2020) has been used to forecast and update expenditure within the study area. Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:
- 1 convenience goods: +4.2%;
 - 2 comparison goods: +1.2%;
 - 3 leisure: -12.6%.
- 4.6 These short term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long term growth average forecasts have been adopted, as follows:
- 1 convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;
 - 2 comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
 - 3 leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.
- 4.7 These growth figures relate to real growth and exclude inflation.
- 4.8 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2019 were:
- 1 4.2% of convenience goods expenditure; and
 - 2 17.5% of comparison goods expenditure.

- 4.9 Experian's projections suggest that these percentages will increase to 5.7% and 23.2% by 2023 respectively. The long-term Experian projections suggest an increase to 7.2% and 28.4% by 2037 respectively.
- 4.10 Table 2 in Appendix 1 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2042, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.
- 4.11 As a consequence of growth in population and per capita spending, total convenience goods spending within the study area is forecast to increase by +13.7% from £1,280 million in 2019 to £1,456 million in 2042, as shown in Table 3 (Appendix 1).
- 4.12 As a consequence of growth in population and per capita spending, comparison goods spending is forecast to increase by +77% between 2019 and 2036, increasing from £1,893 million in 2019 to £3,353 million in 2042, as shown in Table 3 (Appendix 2).
- 4.13 Food and beverage spending is forecast to increase by +31% between 2019 and 2042, increasing from £798 million in 2019 to £1,047 million in 2042, as shown in Table 3 (Appendix 3).

Growth in Turnover Densities

- 4.14 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -5.2% during 2020 and 2021, potentially due to the impact of the Covid-19 restriction. However, a return to growth is envisaged in the medium term (+4.5% in 2022 and then +3.0% per annum during 2023 to 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 4.15 For convenience goods retail, Experian indicates limited growth in sales densities during 2020 to 2022 no predicted growth in sales densities thereafter.
- 4.16 Experian does not provide projections for food and beverage sales densities. Expenditure per capita is expected to recover and grow slowly up to 2027. An average growth rate of 1% per annum has been assumed from 2027.

Base Year Trading 2019

- 4.17 The results of the household shopper survey undertaken by NEMS in August 2019 were used to calculate base year market shares in the EDNS. The 2019 base year market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 1 and 2 respectively. Market shares for food and beverage spending is shown in Table 4 in Appendix 3.
- 4.18 The updated level of expenditure attracted to shops/facilities in Maidstone Borough at 2019 is estimated to be:
- convenience goods £351.76 million;
 - comparison goods £543.64 million;
 - food/beverage £286.61 million.
- 4.19 The updated convenience goods benchmark turnover of existing large food stores within Maidstone Borough is £278.66 million (Table 12, Appendix 1), compared with total available

expenditure of £317.69 million attracted to large stores. These figures suggest that collectively convenience retail facilities in Maidstone Borough were trading healthily in 2019.

- 4.20 Maidstone town centre and out of centre stores in the urban area are estimated to attract £522.84 million of comparison good expenditure at 2019. Comparison goods sales floorspace within Maidstone urban area is estimated to be about 77,000 sq.m net. These figures suggest an average sales density of £6,790 per sq.m net. Based on Lichfields' recent experience across the country, average sales densities for comparison floorspace can vary significantly. Average sales densities above £7,000 per sq.m net are usually only achieved by relatively large shopping centres. Overall, trading levels were satisfactory in Maidstone Borough in 2019, but an allowance should be made for existing floorspace to increase its sales density in real terms in the future.
- 4.21 Food and beverage facilities in the Borough are estimated to attract £286.61 million. Lichfields' analysis of the town centre and village centres in the EDNS 2020 identified 190 food and beverage outlets. Restaurant/bars would be expected to achieve a turnover of between £0.5 million to £1 million on average. Food and beverage facilities in Maidstone Borough were trading healthily in 2019 but have been significantly affected by the Covid-19 crisis during 2020 and early 2021.

Retail and Food/Beverage Floorspace Capacity

- 4.22 As indicated in the EDNS 2020, it is appropriate and realistic to plan to maintain the Borough's market shares over the study period. Major commitments in surrounding authorities (e.g. development at Bluewater, Medway and Ashford) are likely to reduce Maidstone's market share of expenditure, but conversely development within Maidstone could help to counter-balance this reduction in market share. The retail capacity projections assume Maidstone will maintain its market share of expenditure in the future.
- 4.23 Long-term projections at 2032, 2037 and 2042 take account of proposed new garden settlements at Lidsing and Heathlands, which will provide new centres to serve the developments. These developments will alter market shares particularly within Zone 2 in the north and east of the Borough. Future markets shares, including estimates for the proposed residential developments at Lidsing and Heathlands are shown in Tables 8 in Appendix 1, 2 and 3.
- 4.24 Shops and services within Zone 2 currently retain a relatively low proportion of retail and food/beverage expenditure. New centres serving the garden settlements are expected to meet the day to day needs of residents within the local catchment area, which will minimise the need to travel for items and services purchased on a regular basis. The development of new centres at Lidsing and Heathlands provide an opportunity to increase expenditure retention within Zone 2 by improving the range and choice of facilities available. Future floorspace capacity has been assessed based on expected expenditure retention for new Lidsing and Heathlands residents and the indigenous population in the local area.
- 4.25 Realistic expenditure retention rates/market shares for the new garden settlements are shown in Table 4.1, based on Lichfields' experience of similar new settlements and household survey results from across the country. Heathlands is more freestanding and has the potential for a higher critical mass and therefore higher retention rates than Lidsing, which is close to Hempstead Valley Shopping Centre.

Table 4.1 Garden Settlement retention rates (% market share)

	% retained in Heathlands GS	% retained in Lidsing GS
Convenience goods	60%	30%
Comparison goods	20%	10%
Food / beverage	40%	20%

4.26 The retention of comparison goods expenditure within the new settlements is much lower than for convenience goods shopping, because residents will generally travel further and shop around for comparison goods i.e. they will travel into Medway, Maidstone or further afield to visit larger shopping destinations. The provision of local shopping facilities within Lidsing and Heathlands should assist in increasing expenditure retention in the local catchment area.

4.27 These market shares are considered viable in terms of the scope to expand existing facilities, the likely scale of a new retail facilities and the amount of expenditure leakage from the local catchment area.

4.28 Available expenditure has been projected forward to 2023, 2027, 2032, 2037 and 2042, and is summarised in Table 13 in Appendix 1 for convenience goods; Table 12 for comparison goods in Appendix 2; and Table 12 in Appendix 3 for food/beverage expenditure.

4.29 The amount of surplus expenditure is calculated by subtracting the turnover of existing floorspace from available expenditure. This surplus expenditure may be available for new development. The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14 in Appendix 1 for convenience goods retail; Table 13 for comparison goods retail in Appendix 2; and Table 13 in Appendix 3 for food/beverage uses. The results are summarised in Table 4.2 below.

Table 4.2 Retail and food/beverage floorspace capacity (sq.m gross GEA - cumulative)

	2023	2027	2032	2037	2042
Convenience goods retail					
Maidstone urban	1,097	1,882	1,716	2,362	3,034
Garden Settlements	0	0	2,507	3,067	3,625
Other Maidstone Borough	245	419	200	297	401
Sub-total	1,342	2,301	4,423	5,726	7,060
Comparison goods retail					
Maidstone urban	0	0	0	0	0
Garden Settlements	0	0	623	1,005	1,396
Other Maidstone Borough	0	0	3	111	255
Sub-total	0	0	626	1,116	1,651
Food/beverage					
Maidstone urban	0	3,390	4,394	5,023	5,642
Garden Settlements	0	0	445	804	1,154
Other Maidstone Borough	0	735	959	1,100	1,237
Sub-total	0	4,125	5,798	6,927	8,034
Grand Total	1,342	6,426	10,847	13,769	16,745

Sources: Table 14 in Appendix 1, Table 13 in Appendix 2 and Table 13 in Appendix 3.

4.30 The combined updated floorspace projection at 2042 (16,745 sq.m gross) is lower than the comparable projection in the EDNS 2018 (29,708 sq.m gross). The comparison retail and food/beverage floorspace projections are lower due to the impact of the Covid-19 crisis on expenditure growth and on-line shopping.

Commercial Leisure Uses

- 4.31 This section updates the need for commercial leisure uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, and private health and fitness clubs, that are also classified as main town centre uses within the NPPF.

Cinemas

- 4.32 The latest available information indicates total cinema admissions was 176 million in 2019 (Source: British Film Institute). The national average visitation rate is about 2.6 trips per person per annum. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future.
- 4.33 Lichfields' national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 220 trips per seat per annum.
- 4.34 The existing cinema provision (full time) in Maidstone is limited to the Odeon Luxe at Lockmeadow Entertainment Centre with 1,638 seats (8 screens). The study area population is 567,012 (2019) and this would generate around 1,474,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). Maidstone currently retains 31.6% of cinema trips across the study area, which suggest the Borough attracts about 466,000 trips. Adopting the national average population per cinema screen/seats (40,000 trips per screen and 220 trips per seat), this number of trips could support 12 screens or 2,118 seats. These figures suggest a shortfall of 4 screens or 480 seats.
- 4.35 The study area population is projected to increase to 644,418 by 2042. If Maidstone can maintain its market share of cinema trips (31.6%) then it could attract 529,000 trips by 2042. These trips would support 13 screens or 2,407 seats. These projections suggest a shortfall of 5 screens or 769 seats.
- 4.36 If additional screens are not provided at Lockmeadow Entertainment Centre then there is theoretical capacity for a medium sized or boutique cinema in Maidstone over the plan period. For example, Curzon and Everyman are art house cinema operators who have expanded in recent years. Maidstone may be able to attract such an operator and an additional facility would offer more choice.

Theatres

- 4.37 Experian's local expenditure data indicates the study area generates over £30.7 million on live theatre, concerts and shows. Based on the average annual ticket revenue per venue (£5.7 million) the study area population generates demand for 5.4 theatre venues.
- 4.38 The household survey indicated that 42% of respondents in the study area visit theatres. Theatres within Central London were the most popular destinations, attracting 47% of theatre trips, followed by The Marlowe (Canterbury) with 13.5% of trips. Maidstone's Hazlitt Theatre's share of trips was 10.8%, which suggests this venue attracts revenue of £3.3 million, which is lower than the national average per venue (£5.7 million) but may reflect the lower number of seats available.
- 4.39 The relatively close proximity of Maidstone to Central London will affect the likely demand for theatre and concert facilities in the study area. There is no clear need for additional

theatre/concert hall provision in the Borough. However, the development strategy needs to be flexible to respond to emerging opportunities for new facilities of this kind.

Health and fitness clubs

- 4.40 The Sport England/Active Places data indicates that there are 16 registered health and fitness suites in Maidstone, with 1,144 fitness stations in total, as shown in Table 4.3 overleaf. Four of these facilities are for private use only. One facility is 'pay and play' and the remaining 11 registered facilities are open for the public to register as members.

Table 4.3 Maidstone health and fitness suites

Name	Type	No. Fitness Stations
Bob Prowse Health Club	Registered membership	65
Bower Grove School	Private Use	10
David Lloyd Club (Maidstone)	Registered membership	200
Freedom Leisure Maidstone	Registered membership	81
HMP Maidstone	Private Use	26
Livingwell Health Club (Maidstone)	Registered membership	28
Maidstone Leisure Centre	Pay and Play	115
Marriott Leisure & Country Club	Registered membership	72
Snap Fitness (Maidstone)	Registered membership	150
St Augustine Academy	Private Use	17
Sydney Wooderson Sports Centre	Private Use	24
The Lenham School	Registered membership	26
Trugym Maidstone	Registered membership	110
Village Gym (Maidstone)	Registered membership	90
Welcome Gym (Maidstone)	Registered membership	70
YMCA (Maidstone)	Registered membership	60
Total	-	1,144

Source: Active Places, 2019

- 4.41 The current population in Maidstone Borough (Zones 1-2) is 171,826 (2019). This population indicates that Maidstone has about 6.7 fitness stations per 1,000 people (at least 1,114 stations in total).
- 4.42 The South East of England region has 1,251 registered health and fitness suites with 66,685 fitness stations (average of 53.3 stations per suite). This existing provision equates to around 7 fitness stations per 1,000 people in the South East region. Maidstone has a similar provision of fitness stations (6.7 stations per 1,000 people). This suggests there is an appropriate and suitable number of stations and facilities in Maidstone and no clear need for additional gyms.
- 4.43 Growth in population between 2019 and 2042 in Maidstone Borough (Zones 1 and 2) is +30,281 people. This additional population could support 212 fitness stations based on the South East average (7 stations per 1,000 people). There could be scope for 4 medium sized additional gyms (up to 50 stations) in the Borough by 2042.

Tenpin Bowling

- 4.44 There is one tenpin bowling facility in Maidstone – Hollywood Bowl at Lockmeadow Entertainment Centre (18 lanes). Maidstone's market share of bowling trips in the study area is (47.1%). The study area population (567,012 in 2019) could theoretically support 47 lanes, based on one lane per 12,000 people (national average). These figures suggest Maidstone's current market share of tenpin bowling trips can theoretically support 22 lanes. Population growth

within the Borough (+30,281 people between 2019 and 2042), could support a further 2 to 3 lanes by 2042.

- 4.45 The Hollywood Bowl at Lockmeadow Entertainment Centre has 18 lanes. This suggests there is limited theoretical scope for 4 additional lanes at 2019 and possibly 7 lanes by 2042. The close proximity of other tenpin bowling facilities will have an impact on the likely demand for additional facilities in the Borough. There is no clear need for additional tenpin bowling provision in Maidstone.

Bingo, Games of Change and Gambling

- 4.46 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults. The population in the Borough (Zones 1-2) at 2019 171,826 (2019) could in theory support 1.7 bingo facilities and 0.4 casinos based on the national average.
- 4.47 Buzz Bingo and Merkur Casino in Maidstone appear to be sufficient to meet the requirements of the existing and future population of the Borough, with surrounding zones served with other bingo and casino facilities within closer proximity. There is no clear need to plan for additional bingo or casino facilities in Maidstone Borough.

Trampoline, climbing and indoor play centres

- 4.48 Trampoline and indoor climbing centres offer a new, recreational experience for both children and adults. Trampoline centres typically have over 100 interconnected trampolines on site, as well as arcades and party rooms. Large climbing facilities can provide 20 to 30 climbing challenges and soft play areas.
- 4.49 There is an indoor trampoline centre in Maidstone i.e. Gravity Trampoline Park at Lockmeadow Entertainment Centre and the Climbing Experience is located at St Peters Wharf. Despite these existing facilities, the future strategy should be flexible to respond to any emerging new leisure opportunities.

Other Leisure, Entertainment and Cultural Uses

- 4.50 In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as family entertainment centres, escape rooms and virtual golf centres. The representation of these uses is relatively limited in Maidstone. Given the fragmented nature of these sectors it is difficult to quantify the potential demand for these uses over the plan period. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Conclusions on Retail and Commercial Leisure Facilities

- 4.51 A summary of the key findings in this Section is set out below:
- combined scope for comparison and convenience goods retail floorspace of about 8,700 sq.m gross by 2042;
 - food and beverage floorspace of 8,000 sq.m gross by 2042;
 - scope for 5 additional cinema (over 700 seats) which is theoretical capacity for a medium sized or boutique cinema over the plan period;
 - scope for 4 medium sized additional gyms (up to 50 stations) by 2042.

- 4.52 There is no clear need for additional theatre, tenpin bowling, bingo, casino, nightclub/live music venues or trampoline facilities in the Borough. However, the development strategy should to be flexible to respond to emerging opportunities for new leisure facilities.

5.0 Policy Implications

- 5.1 This section outlines the implications of the findings of the EDNS Addendum for relevant emerging policies within the Maidstone Local Plan Review (Regulation 18b – Preferred Approaches Consultation December 2020).

Accommodating Growth

Employment Uses

- 5.2 This EDNS Addendum considers an updated labour demand growth scenario for Maidstone Borough that draws on Experian's latest local level economic forecasts to consider short and longer term effects of the Covid-19 pandemic upon economic growth prospects for the Borough over the Local Plan period. It provides a partial update to the range of economic scenarios considered by the EDNS to reflect the baseline labour demand scenario which forms the Council's preferred employment scenario within the Local Plan Review.
- 5.3 The latest (December 2020) economic forecasts factor in, to the extent that it is currently fully known, the impact of the Covid-19 pandemic on the Borough's economy. They imply higher overall levels of employment growth for Maidstone Borough over the Local Plan period 2022 to 2037 when compared with the previous (September 2019) vintage used as part of the EDNS, although most of this 'increase' in job growth can be explained by a Covid-19 'catching up' and recovery effect at the beginning of the study period.
- 5.4 Whilst the 2020 forecasts should be treated with caution given the uncertainty and significant caveats associated with them, they suggest a very similar medium to longer term job growth trajectory over the new Local Plan period for Maidstone Borough to pre-Covid forecasts and are therefore broadly consistent with the September 2019 forecasts used to inform the EDNS.
- 5.5 The employment floorspace requirements indicated by the December 2020 Experian forecast – equivalent to 140,110 sq.m between 2022 and 2037 – are around 40% higher than those resulting from the September 2019 forecast included in the EDNS, reflecting the higher overall level of job growth implied by the latest projections over the Local Plan period between 2022 and 2037 (and 2042), and the Covid-19 'catching up' effect at the beginning of the study period as sectors that experience job decline as a result of the pandemic gradually recover to pre-pandemic levels of economic activity. It is therefore likely to be the case that some of Experian's projected job growth within office, industrial and warehousing sectors over the first few years of the Local Plan period may not require additional employment floorspace capacity, and this suggests that associated floorspace requirements may exaggerate the true quantum of 'economic need' arising within the Borough over this time.
- 5.6 In this context, we suggest that the 'minimum' quantum of employment floorspace set out within the Local Plan Review (Regulation 18 – Preferred Approaches), at 101,555 sq.m over the period to 2037, remains reasonable and justified, with the updated analysis presented in this EDNS Addendum indicating no need to adjust the Council's proposed overall strategy to planning for employment uses in the Borough based on the evidence considered.
- 5.7 When compared with the latest position in terms of identified employment land supply in Maidstone Borough, allocations and extant planning permissions would provide more than sufficient employment space in quantitative terms to accommodate the Borough's objectively assessed economic needs as implied by the labour demand scenario. The surplus of employment space could amount to over 97,000 sq.m by 2037 if all of the employment and mixed-use allocations and extant planning permissions come forward in full over this period.

- 5.8 This position of employment land over-provision is highlighted in the Council's Local Plan Review (Regulation 18b – Preferred Approaches) which acknowledges the need to prepare for the uncertainties that will exist post Covid-19 and post Brexit by offering maximum choice and flexibility to those wishing to invest or to reinvest in employment creating activities. For this reason, the plan seeks to provide beyond technical targets for employment land provision, keeping this under regular review.
- 5.9 This reflects a proactive and sensible approach by the Council to ensure the Borough is well placed to recover from the short term effects of the pandemic as conditions allow. This approach is also supported by the Borough's updated Economic Development Strategy which looks to position the Borough for a strong return to growth and to excel as the 'Business Capital of Kent'.
- 5.10 The EDNS recommended that the Council should identify a realistic delivery trajectory for its pipeline employment supply to better understand which sites offer the greatest prospects of accommodating employment development over the period to 2037; and this recommendation remains valid in light of the updated analysis presented in this EDNS Addendum. This reflected the scale of pipeline employment land that had the potential to become available for use over the study period, and the flexibility associated with the majority of supply in terms of the mix of uses that could come forward. It should evidence how the Borough's portfolio of allocations and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five year periods) in a similar approach to five year housing land supply assessments as required by PPG.
- 5.11 If the supply position changes from that set out above (e.g. if some of the identified employment space capacity is delivered/built out before the start of the Local Plan in 2022 or does not come forward at all for employment use over the plan period) then this could impact upon the overall balance outlined in this Addendum. We note that some of the site allocations included within the pipeline supply are associated with known deliverability risks and issues, which could influence their ability to deliver as expected. For instance, the Woodcut Farm allocation, although now progressing well with the recent approval of reserved matters in February 2021, has been slow to come forward with the developer citing prohibitive planning conditions for the delay to delivery. Market flexibility and choice will therefore be critical to help mitigate any site-specific barriers to delivery over the plan period. This is underlined further by the recent and proposed changes to the Use Class Order and permitted development rights, specifically the introduction of a new Class E and associated flexibility within this new use class, which will make it harder for the Council to control the quantum and spatial distribution of employment space available to meet business needs across the Borough.
- 5.12 Whilst all of the 237,430 sq.m pipeline employment supply falls within the Borough of Maidstone, its relative location within the Borough may mean that some of the additional capacity that could come forward over the Local Plan period accommodates business demand from across the wider functional economic market area within which the Borough operates. For instance, the location of Woodcut Farm adjacent to the M20 is likely to make this site attractive to broader 'footloose' occupier requirements from across the wider Kent area. Meanwhile, employment provision within the two proposed garden settlements at Lidsing and Heathlands is specifically intended to support the sustainability of each new community (to reduce the need for out-commuting amongst residents etc) and could therefore be considered to be serving an economic need that extends beyond 'general market' provision.

Retail and Town Centre Uses

- 5.13 As indicated in the EDNS 2020, the NPPF, 2019 indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres, for at least 10 years. To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites and should apply a sequential approach for development.
- 5.14 The assessment of the potential for retail and food/beverage floorspace within the previous sections suggests there is limited scope for new development within Maidstone Borough in the short to medium term up to 2027. However, longer term growth generates more significant scope for development up to 2042. The opportunities for accommodating this projected long-term growth has been reassessed. Allowing time for the Local Plan Review to be adopted, the plan could seek to accommodate growth up to 2037.
- 5.15 Draft Policy SS1 of the Local Plan Review sets out the spatial strategy for the Borough. Supporting text (paragraphs 5.13 to 5.18) outline the projected requirement for additional employment and retail floorspace up to 2037.
- 5.16 Paragraph 5.16 indicates a floorspace requirement for all Class A uses of 10,838 sq.m gross by 2032, increasing to 16,146 sq.m gross by 2037. These projections should be updated and amended to 10,847 sq.m gross by 2032 and 13,769 sq.m gross by 2037. The floorspace breakdown shown in Figure 5.1 should also be updated in line with the floorspace projections set out in Table 4.2 in this Addendum report. The floorspace projections in draft Policy SS1 (3) should be updated and rolled forward to 2037, as follows:
- 1 5,726 sq.m gross for retail (convenience) use;
 - 2 1,116 sq.m gross for retail (comparison) uses; and
 - 3 6,927 sq.m gross for food and beverage use.
- 5.17 The supporting text (paragraph 6.17) to Draft Policy SP1 (Maidstone town centre) provides a table of indicative floorspace requirements for Maidstone town centre and the rest of the Borough. This table should also be updated in line with the floorspace projections set out in Table 4.2 of this Addendum report.
- 5.18 The existing stock of shop premises should have a role to play in accommodating some of this projected growth, particularly growth relating to Maidstone urban area. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 5.19 Some of the Maidstone Town Centre mixed use development sites identified within the Local Plan Review (Preferred Approaches - Regulation 18b) could include an element of retail use. The total amount of retail floorspace that could be accommodated is 11,363 sq.m gross, as follows:
- 1 LPRSA009 – Right Kard - 37 sq.m;
 - 2 LPRSA144 – Medway/High Street - 56 sq.m;
 - 3 LPRSA145 – Len House - 530 sq.m;
 - 4 LPRSA146 – Maidstone East - 4,000 sq.m (comparison and convenience retail);
 - 5 LPRSA147 – Gala Bingo/Granada House - 200 sq.m;
 - 6 LPRSA148 – Maidstone Riverside - 5,148 sq.m;
 - 7 LPRSA159 – Maidstone West - 1,034 sq.m;

8 LPRSA150 – Mill Street Car Park - 358 sq.m.

- 5.20 As indicated in the EDNS 2020 vacant shop premises should also help to accommodate growth. Local Plan Review development sites and vacant shop space are more than sufficient to accommodate all of the retail and food/beverage floorspace projection for Maidstone urban area up to 2042 (8,676 sq.m gross).
- 5.21 Draft Policy SP1 refers to development outlined in the Local Plan 2017, indicating the amount of commercial and retail floorspace that was envisaged across the town centre. This section of the draft policy should be reviewed in line with the updated projections in this Addendum report.
- 5.22 Draft Policy SP4 (Garden Settlements) refers to a good employment offer, across a range of job types, with a benchmark target of 1 new job for each new home delivered. Draft Policy SP4(a) - Heathlands Garden Settlement suggests up to 5,000 new jobs could be provided including knowledge focused B1 around a new district centre and new B2/B8 space adjacent to the A20 junction or potential M20 junction. Draft Policy SP4 (b) – development north of M2/Lidsing indicates employment should exceed 2,000 new jobs. Consideration of the future employment, retail and leisure contribution that two proposed garden settlements could be expected to make over the new Local Plan period and beyond is provided within a separate Garden Settlements Economic Report.
- 5.23 Draft Policy SP4 also refers to appropriate retail and services, taking account local and surrounding populations and levels of service provision. Policy SP4 (a) - Heathlands suggests a new district centre focused on a new railway station and local centres where the development extends more than 1.2km from the retail station. Policy SP4 (b) – Lidsing suggests a new local centre created on an orbital bus route linking Lordswood, Hempstead and the Medway towns. These policies do not quantify the scale or nature of development that will be appropriate within the proposed district and local centres.
- 5.24 The updated floorspace capacity projections suggest the combined scale of retail, service and food/beverage floorspace could be up to about 5,000 sq.m gross at Heathlands and about 1,200 sq.m gross at Lidsing. The acceptability of this quantum of floorspace needs to be carefully considered in relation to the projected trajectory of house completions and potential impact on nearby centres.

Other Local Plan Review Policies

- 5.25 The NPPF (paragraph 85) indicates that planning policies should define a network and hierarchy of centres and promote their long term vitality and viability by allowing them to grow and diversify.
- 5.26 The Local Plan Key Diagram identifies a hierarchy of centres i.e. Maidstone Town Centre; 6 Rural service centres and 4 Larger Villages. Consistent with the NPPF, draft Policies SP1, SP6, SP6 (A to E), SP7 and SP7 (A to D) seeks to maintain this network of centres.
- 5.27 All development proposals for main town centre uses within out of centre locations and not on allocated sites should continue to comply with the sequential and the impact tests for retail and leisure uses, as set out in Draft Policy CD1 (Town, District and Local Centres), in order to protect the vitality and viability of the network of centres within the Borough.
- 5.28 Draft Policy CD1 sets out minimum floorspace thresholds where an impact assessment will be required. The proposed threshold for Maidstone Urban Area is in line with the NPPF threshold (2,500 sq.m). Although the wording of the policy does not clearly state this is a gross floorspace threshold, which could be amended to avoid confusion. Consistent with the recommendations in the EDNS 2020, a lower threshold of 400 sq.m gross is proposed for development beyond

Maidstone Urban Area, which is aligned with the Sunday trading limit (280 sq.m net). The lower retail capacity projections in this update endorse the application of this lower impact threshold.

- 5.29 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 which has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses. Changes to permitted development rights effective from August 2021 will further reduce the ability to control uses.
- 5.30 Draft Policy CD1 seeks to prevent the loss of Class E and F uses at ground floor level within designated centres and important community uses within local centres.
- 5.31 Draft Policy CD2 relates to primary and secondary frontages in Maidstone town centre and merges adopted policies DM27 and DM28 into one policy. The previous use Classes A1 to A5 have been amended to reflect the UCO changes, by reference to sub-categories within the new Class E. An objective of Policy CD2 is to retain a predominance (85%) of retail uses (previously Class A1) in primary shopping frontages and retain main town centre uses and active frontages in the secondary shopping frontages.
- 5.32 As indicated in the EDNS, the revised NPPF does not mention the designation of primary or secondary frontages traditionally used to control the mix of uses but NPPG indicates authorities may, where appropriate, define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. The revised NPPF implies a more flexible approach should be considered where diversification could help to maintain the vitality and viability of a centre. A primary shopping area and town centre boundary should continue to be defined for Maidstone, as the main shopping destination in the Borough. These boundaries are required for the application of the sequential and impact tests.
- 5.33 The effectiveness and appropriateness of Draft Policy CD2 could be challenged. The sub-categories within Class E do not prevent movement within Class E i.e. change from one sub-category to another is not development and does not require planning permission. This movement cannot be prevented by Article 4 Directions because movement within Class E is not development or permitted development. The need to retain 85% retail use within Maidstone's primary shopping frontages could also be challenged due to the negative comparison retail floorspace capacity projection and the greater need for food/beverage floorspace. The retail capacity projections indicate there is a need for a range of new uses and a flexible approach capable of accommodate leisure and cultural uses is also recommended.
- 5.34 The objectives of Draft Policy CD2 could be implemented in relation to new developments by imposing planning conditions that restrict the amount of floorspace within the Class E sub-categories. However, the draft policy will provide no control on changes within Class E for existing shop premises or the new permitted development rights allowing movement from Class E to residential. In our view the Council should reconsider the proposed approach set out in Draft Policy CD2.

Appendix 1 Convenience Goods Assessment

Table 1 - Study area population

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	110,043	114,829	118,471	120,975	121,841	122,623
Zone 2a - Lidsing Garden Settlement	0	0	0	1,547	3,094	4,760
Zone 2b - Heathlands Garden Settlement	0	0	0	1,320	3,808	6,188
Zone 2c - Maidstone Rural	61,783	64,337	66,306	67,641	68,086	68,535
Zone 3 - Swale	123,824	127,896	132,162	136,586	140,704	144,844
Zone 4 - Medway	138,792	140,489	141,488	142,439	143,554	145,102
Zone 5 - Tonbridge/Malling	84,774	88,384	91,531	94,580	97,169	99,792
Zone 6 - Tunbridge/Ashford Rural	47,796	49,052	49,848	50,788	51,625	52,575
Total	567,012	584,987	599,806	615,876	629,881	644,419

Sources:

Experian Population Projections (2019 base)

Garden Settlements

Lidsing - 1,300 dwellings by 2037 - start 2027 average of 130 dwellings per annum at 2.38 people per dwelling

Heathland - 2,800 dwellings by 2042 - start 2029 average of 200 dwellings per annum at 2.38 people per dwelling

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	2,229	2,236	2,217	2,218	2,222	2,229
Zone 2a - Lidsing Garden Settlement	2,324	2,331	2,311	2,313	2,317	2,323
Zone 2b - Heathlands Garden Settlement	2,324	2,331	2,311	2,313	2,317	2,323
Zone 2c - Maidstone Rural	2,419	2,426	2,405	2,407	2,411	2,418
Zone 3 - Swale	2,182	2,189	2,170	2,172	2,175	2,182
Zone 4 - Medway	2,178	2,184	2,165	2,167	2,171	2,177
Zone 5 - Tonbridge/Malling	2,299	2,306	2,286	2,288	2,292	2,298
Zone 6 - Tunbridge/Ashford Rural	2,480	2,487	2,466	2,468	2,472	2,479

Sources:

Experian local expenditure estimates 2019 base and growth rates October 2020 (Retail Planner Briefing Note 18)

Data at 2019 prices

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	245.29	256.72	262.62	268.36	270.76	273.27
Zone 2a - Lidsing Garden Settlement	0.00	0.00	0.00	3.58	7.17	11.06
Zone 2b - Heathlands Garden Settlement	0.00	0.00	0.00	3.05	8.82	14.38
Zone 2c - Maidstone Rural	149.45	156.08	159.49	162.81	164.17	165.73
Zone 3 - Swale	270.18	279.91	286.80	296.61	306.09	315.99
Zone 4 - Medway	302.29	306.80	306.36	308.64	311.60	315.86
Zone 5 - Tonbridge/Malling	194.90	203.80	209.26	216.39	222.70	229.36
Zone 6 - Tunbridge/Ashford Rural	118.53	122.01	122.94	125.35	127.64	130.36
Study Area Total	1,280.64	1,325.31	1,347.46	1,384.78	1,418.96	1,456.01

Source: Tables 1 and 2

Table 4 - Base year 2019 convenience goods market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Sainsbury's, Romney Place, Maidstone	6.7%	4.2%	0.0%	0.2%	0.4%	0.0%
Other Maidstone town centre	4.2%	4.5%	0.0%	0.2%	0.8%	0.7%
Aldi, Langely Park Centre	6.7%	7.9%	0.6%	0.0%	3.2%	2.2%
Aldi, Well Road, Maidstone	3.8%	0.8%	0.0%	0.7%	0.9%	0.3%
Lidl, Broadway Shopping Centre	3.4%	0.2%	0.0%	0.3%	1.4%	0.0%
Lidl, Farleigh Hill	3.3%	2.8%	0.0%	0.5%	0.6%	0.3%
Morrisons, St. Saviour's Road	13.7%	8.4%	0.0%	0.0%	0.0%	1.4%
Tesco, Farleigh Hill	2.6%	8.9%	0.0%	0.7%	0.3%	0.0%
Tesco, The Minor Centre, Weaving	10.8%	13.2%	0.0%	0.0%	2.0%	0.0%
Waitrose, Midkent Shopping Centre	8.3%	0.0%	0.2%	0.2%	1.0%	0.0%
Other Maidstone urban area	5.7%	2.7%	0.0%	0.0%	0.3%	0.0%
Other Maidstone Borough large stores	11.2%	12.3%	0.0%	0.6%	0.2%	0.6%
Other Maidstone Borough	3.1%	5.0%	0.0%	0.0%	0.2%	0.0%
Lidsing Garden Settlement	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Heathlands Garden Settlement	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Maidstone Borough Total	83.5%	70.9%	0.8%	3.4%	11.3%	5.5%
Medway	0.6%	3.6%	2.1%	93.4%	12.0%	0.7%
Sittingbourne	0.2%	3.1%	64.5%	0.7%	0.2%	0.0%
Faversham	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%
Ashford	0.2%	3.2%	0.2%	0.0%	0.5%	8.3%
Tonbridge	0.0%	5.6%	0.0%	0.0%	6.7%	32.2%
Tunbridge Wells	0.7%	1.3%	0.0%	0.8%	1.8%	23.3%
Aylesford/West Malling	13.8%	5.5%	0.0%	0.0%	44.2%	0.3%
Elsewhere	1.0%	6.8%	27.7%	1.7%	23.3%	29.7%
Other Total	16.5%	29.1%	99.2%	96.6%	88.7%	94.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results)

Table 5 - Base year 2019 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	245.29	149.45	270.18	302.29	194.90	118.53	1,280.64
Sainsbury's, Romney Place, Maidstone	16.43	6.28	0.00	0.60	0.78	0.00	24.10
Other Maidstone town centre	10.30	6.73	0.00	0.60	1.56	0.83	20.02
Aldi, Langely Park Centre	16.43	11.81	1.62	0.00	6.24	2.61	38.71
Aldi, Well Road, Maidstone	9.32	1.20	0.00	2.12	1.75	0.36	14.74
Lidl, Broadway Shopping Centre	8.34	0.30	0.00	0.91	2.73	0.00	12.27
Lidl, Farleigh Hill	8.09	4.18	0.00	1.51	1.17	0.36	15.32
Morrisons, St. Saviour's Road	33.60	12.55	0.00	0.00	0.00	1.66	47.82
Tesco, Farleigh Hill	6.38	13.30	0.00	2.12	0.58	0.00	22.38
Tesco, The Minor Centre, Weavinging	26.49	19.73	0.00	0.00	3.90	0.00	50.12
Waitrose, Midkent Shopping Centre	20.36	0.00	0.54	0.60	1.95	0.00	23.45
Other Maidstone urban area	13.98	4.04	0.00	0.00	0.58	0.00	18.60
Other Maidstone Borough large stores	27.47	18.38	0.00	1.81	0.39	0.71	48.77
Other Maidstone Borough	7.60	7.47	0.00	0.00	0.39	0.00	15.47
Maidstone Borough Total	204.81	105.96	2.16	10.28	22.02	6.52	351.76
Medway	1.47	5.38	5.67	282.34	23.39	0.83	319.08
Sittingbourne	0.49	4.63	174.27	2.12	0.39	0.00	181.90
Faversham	0.00	0.00	12.70	0.00	0.00	0.00	12.70
Ashford	0.49	4.78	0.54	0.00	0.97	9.84	16.63
Tonbridge	0.00	8.37	0.00	0.00	13.06	38.17	59.60
Tunbridge Wells	1.72	1.94	0.00	2.42	3.51	27.62	37.20
Aylesford/West Malling	33.85	8.22	0.00	0.00	86.14	0.36	128.57
Elsewhere	2.45	10.16	74.84	5.14	45.41	35.20	173.21
Other Total	40.47	43.49	268.02	292.01	172.87	112.01	928.88
TOTAL	245.29	149.45	270.18	302.29	194.90	118.53	1,280.64

Source: Tables 3 and 4

Table 6 - Short term 2023 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2023	256.72	156.08	279.91	306.80	203.80	122.01	1,325.31
Sainsbury's, Romney Place, Maidstone	17.20	6.56	0.00	0.61	0.82	0.00	25.18
Other Maidstone town centre	10.78	7.02	0.00	0.61	1.63	0.85	20.90
Aldi, Langely Park Centre	17.20	12.33	1.68	0.00	6.52	2.68	40.42
Aldi, Well Road, Maidstone	9.76	1.25	0.00	2.15	1.83	0.37	15.35
Lidl, Broadway Shopping Centre	8.73	0.31	0.00	0.92	2.85	0.00	12.81
Lidl, Farleigh Hill	8.47	4.37	0.00	1.53	1.22	0.37	15.96
Morrisons, St. Saviour's Road	35.17	13.11	0.00	0.00	0.00	1.71	49.99
Tesco, Farleigh Hill	6.67	13.89	0.00	2.15	0.61	0.00	23.32
Tesco, The Minor Centre, Weavinging	27.73	20.60	0.00	0.00	4.08	0.00	52.40
Waitrose, Midkent Shopping Centre	21.31	0.00	0.56	0.61	2.04	0.00	24.52
Other Maidstone urban area	14.63	4.21	0.00	0.00	0.61	0.00	19.46
Other Maidstone Borough large stores	28.75	19.20	0.00	1.84	0.41	0.73	50.93
Other Maidstone Borough	7.96	7.80	0.00	0.00	0.41	0.00	16.17
Maidstone Borough Total	214.36	110.66	2.24	10.43	23.03	6.71	367.43
Medway	1.54	5.62	5.88	286.55	24.46	0.85	324.90
Sittingbourne	0.51	4.84	180.54	2.15	0.41	0.00	188.45
Faversham	0.00	0.00	13.16	0.00	0.00	0.00	13.16
Ashford	0.51	4.99	0.56	0.00	1.02	10.13	17.21
Tonbridge	0.00	8.74	0.00	0.00	13.65	39.29	61.68
Tunbridge Wells	1.80	2.03	0.00	2.45	3.67	28.43	38.38
Aylesford/West Malling	35.43	8.58	0.00	0.00	90.08	0.37	134.46
Elsewhere	2.57	10.61	77.54	5.22	47.48	36.24	179.65
Other Total	42.36	45.42	277.67	296.37	180.77	115.30	957.89
TOTAL	256.72	156.08	279.91	306.80	203.80	122.01	1,325.31

Source: Tables 3 and 4

Table 7 - Medium term 2027 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	262.62	159.49	286.80	306.36	209.26	122.94	1,347.46
Sainsbury's, Romney Place, Maidstone	17.60	6.70	0.00	0.61	0.84	0.00	25.74
Other Maidstone town centre	11.03	7.18	0.00	0.61	1.67	0.86	21.35
Aldi, Langely Park Centre	17.60	12.60	1.72	0.00	6.70	2.70	41.32
Aldi, Well Road, Maidstone	9.98	1.28	0.00	2.14	1.88	0.37	15.65
Lidl, Broadway Shopping Centre	8.93	0.32	0.00	0.92	2.93	0.00	13.10
Lidl, Farleigh Hill	8.67	4.47	0.00	1.53	1.26	0.37	16.29
Morrisons, St. Saviour's Road	35.98	13.40	0.00	0.00	0.00	1.72	51.10
Tesco, Farleigh Hill	6.83	14.19	0.00	2.14	0.63	0.00	23.79
Tesco, The Minor Centre, Weavinging	28.36	21.05	0.00	0.00	4.19	0.00	53.60
Waitrose, Midkent Shopping Centre	21.80	0.00	0.57	0.61	2.09	0.00	25.08
Other Maidstone urban area	14.97	4.31	0.00	0.00	0.63	0.00	19.90
Other Maidstone Borough large stores	29.41	19.62	0.00	1.84	0.42	0.74	52.02
Other Maidstone Borough	8.14	7.97	0.00	0.00	0.42	0.00	16.53
Maidstone Borough Total	219.28	113.08	2.29	10.42	23.65	6.76	375.48
Medway	1.58	5.74	6.02	286.14	25.11	0.86	325.45
Sittingbourne	0.53	4.94	184.98	2.14	0.42	0.00	193.02
Faversham	0.00	0.00	13.48	0.00	0.00	0.00	13.48
Ashford	0.53	5.10	0.57	0.00	1.05	10.20	17.45
Tonbridge	0.00	8.93	0.00	0.00	14.02	39.59	62.54
Tunbridge Wells	1.84	2.07	0.00	2.45	3.77	28.64	38.77
Aylesford/West Malling	36.24	8.77	0.00	0.00	92.49	0.37	137.88
Elsewhere	2.63	10.85	79.44	5.21	48.76	36.51	183.39
Other Total	43.33	46.41	284.50	295.94	185.62	116.18	971.98
TOTAL	262.62	159.49	286.80	306.36	209.26	122.94	1,347.46

Source: Tables 3 and 4

Table 8 - Future long term convenience goods market shares by zone (%) - with garden settlements

Destination	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6
Maidstone town centre	10.9%	2.0%	8.0%	8.5%	0.0%	0.4%	1.2%	0.7%
Large stores in Maidstone urban area	52.6%	5.0%	24.0%	36.7%	0.8%	2.4%	9.4%	4.2%
Other Maidstone urban area	5.7%	0.0%	1.0%	2.6%	0.0%	0.0%	0.3%	0.0%
Other Maidstone Borough	14.3%	1.0%	3.0%	15.2%	0.0%	0.6%	0.4%	0.6%
Lidsing Garden Settlement	0.0%	30.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Heathlands Garden Settlement	0.0%	0.0%	60.0%	10.0%	0.0%	0.0%	0.0%	1.0%
Maidstone Borough Total	83.5%	38.0%	96.0%	73.0%	0.8%	3.6%	11.3%	6.5%
Medway	0.6%	60.0%	0.0%	3.0%	2.1%	93.2%	12.0%	0.7%
Sittingbourne	0.2%	0.0%	0.0%	3.0%	64.5%	0.7%	0.2%	0.0%
Faversham	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%
Ashford	0.2%	0.0%	3.0%	2.2%	0.2%	0.0%	0.5%	7.3%
Tonbridge	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	6.7%	32.2%
Tunbridge Wells	0.7%	0.0%	0.0%	1.3%	0.0%	0.8%	1.8%	23.3%
Aylesford/West Malling	13.8%	1.0%	0.0%	5.4%	0.0%	0.0%	44.2%	0.3%
Elsewhere	1.0%	1.0%	1.0%	6.5%	27.7%	1.7%	23.3%	29.7%
Other Total	16.5%	62.0%	4.0%	27.0%	99.2%	96.4%	88.7%	93.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results) and Lichfields' estimates

Table 9 - Future 2032 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2a	Zone 2b	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	268.36	3.58	3.05	162.81	296.61	308.64	216.39	125.35	1,384.78
Maidstone town centre	29.25	0.07	0.24	13.84	0.00	1.23	2.60	0.88	48.11
Large stores in Maidstone urban area	141.16	0.18	0.73	59.75	2.37	7.41	20.34	5.26	237.20
Other Maidstone urban area	15.30	0.00	0.03	4.23	0.00	0.00	0.65	0.00	20.21
Other Maidstone Borough	38.38	0.04	0.09	24.75	0.00	1.85	0.87	0.75	66.72
Lidsing Garden Settlement	0.00	1.07	0.00	0.00	0.00	0.62	0.00	0.00	1.69
Heathlands Garden Settlement	0.00	0.00	1.83	16.28	0.00	0.00	0.00	1.25	19.37
Maidstone Borough Total	224.08	1.36	2.93	118.85	2.37	11.11	24.45	8.15	393.30
Medway	1.61	2.15	0.00	4.88	6.23	287.65	25.97	0.88	329.36
Sittingbourne	0.54	0.00	0.00	4.88	191.31	2.16	0.43	0.00	199.33
Faversham	0.00	0.00	0.00	0.00	13.94	0.00	0.00	0.00	13.94
Ashford	0.54	0.00	0.09	3.58	0.59	0.00	1.08	9.15	15.04
Tonbridge	0.00	0.00	0.00	9.12	0.00	0.00	14.50	40.36	63.98
Tunbridge Wells	1.88	0.00	0.00	2.12	0.00	2.47	3.89	29.21	39.56
Aylesford/West Malling	37.03	0.04	0.00	8.79	0.00	0.00	95.64	0.38	141.88
Elsewhere	2.68	0.04	0.03	10.58	82.16	5.25	50.42	37.23	188.39
Other Total	44.28	2.22	0.12	43.96	294.23	297.53	191.93	117.20	991.47
TOTAL	268.36	3.58	3.05	162.81	296.61	308.64	216.39	125.35	1,384.78

Source: Tables 3 and 8

Table 10 - Future 2037 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2a	Zone 2b	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	270.76	7.17	8.82	164.17	306.09	311.60	222.70	127.64	1,418.96
Maidstone town centre	29.51	0.14	0.71	13.95	0.00	1.25	2.67	0.89	49.13
Large stores in Maidstone urban area	142.42	0.36	2.12	60.25	2.45	7.48	20.93	5.36	241.37
Other Maidstone urban area	15.43	0.00	0.09	4.27	0.00	0.00	0.67	0.00	20.46
Other Maidstone Borough	38.72	0.07	0.26	24.95	0.00	1.87	0.89	0.77	67.54
Lidsing Garden Settlement	0.00	2.15	0.00	0.00	0.00	0.62	0.00	0.00	2.77
Heathlands Garden Settlement	0.00	0.00	5.29	16.42	0.00	0.00	0.00	1.28	22.99
Maidstone Borough Total	226.08	2.72	8.47	119.85	2.45	11.22	25.17	8.30	404.25
Medway	1.62	4.30	0.00	4.93	6.43	290.42	26.72	0.89	335.31
Sittingbourne	0.54	0.00	0.00	4.93	197.43	2.18	0.45	0.00	205.52
Faversham	0.00	0.00	0.00	0.00	14.39	0.00	0.00	0.00	14.39
Ashford	0.54	0.00	0.26	3.61	0.61	0.00	1.11	9.32	15.46
Tonbridge	0.00	0.00	0.00	9.19	0.00	0.00	14.92	41.10	65.21
Tunbridge Wells	1.90	0.00	0.00	2.13	0.00	2.49	4.01	29.74	40.27
Aylesford/West Malling	37.36	0.07	0.00	8.87	0.00	0.00	98.44	0.38	145.12
Elsewhere	2.71	0.07	0.09	10.67	84.79	5.30	51.89	37.91	193.42
Other Total	44.67	4.44	0.35	44.33	303.64	300.39	197.54	119.34	1,014.71
TOTAL	270.76	7.17	8.82	164.17	306.09	311.60	222.70	127.64	1,418.96

Source: Tables 3 and 8

Table 11 - Future 2042 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2a	Zone 2b	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	273.27	11.06	14.38	165.73	315.99	315.86	229.36	130.36	1,456.01
Maidstone town centre	29.79	0.22	1.15	14.09	0.00	1.26	2.75	0.91	50.17
Large stores in Maidstone urban area	143.74	0.55	3.45	60.82	2.53	7.58	21.56	5.47	245.71
Other Maidstone urban area	15.58	0.00	0.14	4.31	0.00	0.00	0.69	0.00	20.72
Other Maidstone Borough	39.08	0.11	0.43	25.19	0.00	1.90	0.92	0.78	68.40
Lidsing Garden Settlement	0.00	3.32	0.00	0.00	0.00	0.63	0.00	0.00	3.95
Heathlands Garden Settlement	0.00	0.00	8.63	16.57	0.00	0.00	0.00	1.30	26.50
Maidstone Borough Total	228.18	4.20	13.80	120.98	2.53	11.37	25.92	8.47	415.46
Medway	1.64	6.64	0.00	4.97	6.64	294.38	27.52	0.91	342.70
Sittingbourne	0.55	0.00	0.00	4.97	203.81	2.21	0.46	0.00	212.00
Faversham	0.00	0.00	0.00	0.00	14.85	0.00	0.00	0.00	14.85
Ashford	0.55	0.00	0.43	3.65	0.63	0.00	1.15	9.52	15.92
Tonbridge	0.00	0.00	0.00	9.28	0.00	0.00	15.37	41.97	66.62
Tunbridge Wells	1.91	0.00	0.00	2.15	0.00	2.53	4.13	30.37	41.10
Aylesford/West Malling	37.71	0.11	0.00	8.95	0.00	0.00	101.38	0.39	148.54
Elsewhere	2.73	0.11	0.14	10.77	87.53	5.37	53.44	38.72	198.82
Other Total	45.09	6.86	0.58	44.75	313.46	304.49	203.45	121.88	1,040.55
TOTAL	273.27	11.06	14.38	165.73	315.99	315.86	229.36	130.36	1,456.01

Source: Tables 3 and 8

Table 12 - Convenience goods floorspace in Maidstone Borough main settlements (2019 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Maidstone town centre					
Sainsbury's, Romney Place	2,973	85%	2,527	£12,297	£31.08
Co-op, Week Street	342	95%	325	£11,407	£3.71
Iceland, Chequers Shopping Centre	588	98%	576	£7,109	£4.10
M&S Foodhall, Week Street	460	98%	451	£10,497	£4.73
McColls, High Street	118	98%	116	£7,000	£0.81
Tesco Express, Week Street	254	98%	249	£14,515	£3.61
Other town centre	3,395	100%	3,395	n/a	n/a
	8,130		7,639		£48.03
Maidstone urban					
Aldi, Langley Park Centre	1,205	85%	1,024	£11,195	£11.47
Aldi, Well Road	948	85%	806	£11,195	£9.02
Co-op, Loose Road	336	98%	329	£11,407	£3.76
Home Bargains, London Road Retail Park	757	25%	189	£3,747	£0.71
Iceland, London Road Retail Park	819	98%	803	£7,109	£5.71
Lidl, Broadway Shopping Centre	1,767	85%	1,502	£11,439	£17.18
Lidl, Farleigh Hill	1,630	85%	1,386	£11,439	£15.85
M&S Simply Food (BP), London Road	83	98%	81	£10,497	£0.85
M&S Foodhall, Eclipse Retail Park	697	98%	683	£10,497	£7.17
M&S Simply Food, Maidstone Hospital	80	98%	78	£10,497	£0.82
Morrisons, St Saviours Road	4,223	75%	3,167	£13,074	£41.41
Sainsbury's Local, Loose Road	245	98%	240	£12,297	£2.95
Tesco Express (Esso), Tonbridge Road	116	98%	114	£14,515	£1.65
Tesco Express, London Road	140	98%	137	£14,515	£1.99
Tesco Express, Loose Road	247	98%	242	£14,515	£3.51
Tesco, Farleigh Hill	1,273	90%	1,146	£14,515	£16.63
Tesco, The Minor Centre	3,068	85%	2,608	£14,515	£37.85
Waitrose, Mid Kent Shopping Centre	1,147	90%	1,032	£13,782	£14.23
	18,781		15,568		£192.76
Maidstone Borough Other					
Co-op, Buckingham Drive, Harrietsham	342	98%	335	£11,407	£3.82
Sainsbury's Local, High Street, Headcorn	254	98%	249	£12,297	£3.06
M&S Simply Food (BP), Lenham	84	98%	82	£10,497	£0.86
Co-op, Faversham Road, Lenham	232	98%	227	£11,407	£2.59
McColls, Honywood Road, Lenham	115	98%	113	£7,000	£0.79
McColls, High Street, Staplehurst	72	98%	71	£7,000	£0.49
McColls, Wallis Avenue	166	98%	163	£7,000	£1.14
McColls, Egremont Avenue	132	98%	129	£7,000	£0.91
McColls, Boxley Road	49	98%	48	£7,000	£0.34
Morrisons Daily, Staplehurst	171	98%	168	£13,074	£2.19
Sainsbury's Local, Tonbridge Road	236	98%	231	£12,297	£2.84
Tesco Express, Hermitage Walk	201	98%	197	£14,515	£2.86
Tesco Express (Esso), Ashford Road	116	98%	114	£14,515	£1.65
Co-op, Egremont Road	354	98%	347	£11,407	£3.96
Co-op, Willington Street	156	98%	153	£11,407	£1.74
Co-op, Northumberland Road	107	98%	105	£11,407	£1.20
M&S Simply Food, Hertitage Lane	721	98%	707	£10,497	£7.42
Other village shops	1,230	100%	1,230	n/a	n/a
	4,738		4,668		£37.86
TOTAL	31,649		27,874		£278.66

Source: Maidstone Experian Goad Plan Oct 2017 (updated Feb 2019), Lichfields' site survey (Feb 2019) VOA, ORC Storepoint 2021 and Global Data 2020

Table 13 - Summary of Convenience Goods Expenditure 2019 to 2042 (£M)

	2019	2023	2027	2032	2037	2042
Available expenditure						
Maidstone urban area	287.52	300.33	306.92	305.53	310.95	316.60
Other Maidstone Borough	64.24	67.10	68.56	66.72	67.54	68.40
Lidsing Garden Settlement	0.00	0.00	0.00	1.69	2.77	3.95
Heathlands Garden Settlement	0.00	0.00	0.00	19.37	22.99	26.50
Total	351.76	367.43	375.48	393.30	404.25	415.46
Turnover of existing facilities						
Maidstone urban area	287.52	291.12	291.12	291.12	291.12	291.12
Other Maidstone Borough	64.24	65.04	65.04	65.04	65.04	65.04
Lidsing Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Heathlands Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Total	351.76	356.15	356.15	356.15	356.15	356.15
Surplus/deficit expenditure						
Maidstone urban area	0.00	9.21	15.81	14.41	19.84	25.48
Other Maidstone Borough	0.00	2.06	3.52	1.68	2.50	3.37
Lidsing Garden Settlement	0.00	0.00	0.00	1.69	2.77	3.95
Heathlands Garden Settlement	0.00	0.00	0.00	19.37	22.99	26.50
Total	0.00	11.27	19.33	37.15	48.10	59.30

Source: Tables 5 to 11

Table 14 - Convenience goods floorspace capacity up to 2042 (sq.m)

	2023	2027	2032	2037	2042
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Sales floorspace projection (sq.m net)					
Maidstone urban area	768	1,317	1,201	1,653	2,124
Other Maidstone Borough	172	293	140	208	281
Lidsing Garden Settlement	0	0	141	231	329
Heathlands Garden Settlement	0	0	1,614	1,916	2,209
Total	940	1,610	3,096	4,008	4,942
Floorspace projection (sq.m gross) *					
Maidstone urban area	1,097	1,882	1,716	2,362	3,034
Other Maidstone Borough	245	419	200	297	401
Lidsing Garden Settlement	0	0	201	330	470
Heathlands Garden Settlement	0	0	2,306	2,737	3,155
Total	1,342	2,301	4,423	5,726	7,060

Source: Table 12

* net to gross ratio of 70%.

Appendix 2 Comparison Goods Assessment

Table 1 - Study area population

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	110,043	114,829	118,471	120,975	121,841	122,623
Zone 2a - Lidsing Garden Settlement	0	0	0	1,547	3,094	4,760
Zone 2b - Heathlands Garden Settlement	0	0	0	1,320	3,808	6,188
Zone 2c - Maidstone Rural	61,783	64,337	66,306	67,641	68,086	68,535
Zone 3 - Swale	123,824	127,896	132,162	136,586	140,704	144,844
Zone 4 - Medway	138,792	140,489	141,488	142,439	143,554	145,102
Zone 5 - Tonbridge/Malling	84,774	88,384	91,531	94,580	97,169	99,792
Zone 6 - Tunbridge/Ashford Rural	47,796	49,052	49,848	50,788	51,625	52,575
Total	567,012	584,987	599,806	615,876	629,881	644,419

Sources:

Experian Population Projections (2019 base)

Garden Settlements

Lidsing - 1,300 dwellings by 2037 - start 2027 average of 130 dwellings per annum at 2.38 people per dwelling

Heathland - 2,800 dwellings by 2042 - start 2029 average of 200 dwellings per annum at 2.38 people per dwelling

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	3,253	3,155	3,431	3,873	4,406	5,062
Zone 2a - Lidsing Garden Settlement	3,550	3,443	3,744	4,226	4,808	5,524
Zone 2b - Heathlands Garden Settlement	3,550	3,443	3,744	4,226	4,808	5,524
Zone 2c - Maidstone Rural	3,847	3,731	4,057	4,580	5,211	5,986
Zone 3 - Swale	3,120	3,026	3,291	3,714	4,226	4,855
Zone 4 - Medway	3,076	2,983	3,244	3,661	4,166	4,786
Zone 5 - Tonbridge/Malling	3,511	3,405	3,703	4,180	4,756	5,464
Zone 6 - Tunbridge/Ashford Rural	3,896	3,779	4,109	4,639	5,278	6,063

Sources:

Experian Local Expenditure 2019 (2019 prices)

Experian Retail Planner Briefing Note 18 (October 2020) growth rates

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	357.97	362.28	406.44	468.48	536.84	620.69
Zone 2a - Lidsing Garden Settlement	0.00	0.00	0.00	6.54	14.88	26.29
Zone 2b - Heathlands Garden Settlement	0.00	0.00	0.00	5.58	18.31	34.18
Zone 2c - Maidstone Rural	237.68	240.05	269.01	309.77	354.77	410.26
Zone 3 - Swale	386.35	387.03	434.90	507.34	594.63	703.23
Zone 4 - Medway	426.87	419.07	458.94	521.52	598.02	694.42
Zone 5 - Tonbridge/Malling	297.66	300.98	338.94	395.34	462.12	545.22
Zone 6 - Tunbridge Wells/Ashford Rural	186.24	185.37	204.84	235.58	272.46	318.77
Study Area Total	1,892.76	1,894.78	2,113.08	2,450.15	2,852.01	3,353.05

Source: Tables 1 and 2

Table 4 - Base year 2019 comparison goods market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Maidstone town centre	47.2%	35.5%	12.9%	9.6%	23.7%	9.3%
Maidstone out of centre urban area	12.5%	7.7%	0.9%	2.3%	4.3%	0.9%
Other Maidstone Borough	2.1%	4.3%	0.0%	0.1%	0.7%	0.3%
Maidstone Borough Total	61.8%	47.5%	13.8%	12.0%	28.7%	10.5%
Canterbury	1.3%	0.8%	5.0%	0.4%	1.1%	1.2%
Medway	2.3%	4.2%	10.3%	56.7%	10.2%	0.0%
Sittingbourne	0.7%	3.3%	39.3%	1.3%	0.0%	0.0%
Ashford	2.4%	7.2%	1.5%	0.8%	2.3%	5.4%
Tonbridge	0.6%	0.8%	0.0%	0.0%	4.0%	6.8%
Tunbridge Wells	1.2%	5.3%	0.0%	0.0%	4.6%	45.8%
Aylesford	14.6%	14.9%	2.3%	1.6%	19.0%	0.7%
Bluewater Shopping Centre	9.3%	8.7%	10.5%	16.3%	19.0%	1.3%
Other outside the Borough	5.8%	7.3%	17.3%	10.9%	11.1%	28.3%
Other Total	38.2%	52.5%	86.2%	88.0%	71.3%	89.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results)

Table 5 - Base year 2019 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	357.97	237.68	386.35	426.87	297.66	186.24	1,892.76
Maidstone town centre	168.96	84.38	49.84	40.98	70.55	17.32	432.02
Maidstone out of centre urban area	44.75	18.30	3.48	9.82	12.80	1.68	90.82
Other Maidstone Borough	7.52	10.22	0.00	0.43	2.08	0.56	20.81
Maidstone Borough Total	221.22	112.90	53.32	51.22	85.43	19.55	543.64
Canterbury	4.65	1.90	19.32	1.71	3.27	2.23	33.09
Medway	8.23	9.98	39.79	242.03	30.36	0.00	330.41
Sittingbourne	2.51	7.84	151.84	5.55	0.00	0.00	167.73
Ashford	8.59	17.11	5.80	3.41	6.85	10.06	51.82
Tonbridge	2.15	1.90	0.00	0.00	11.91	12.66	28.62
Tunbridge Wells	4.30	12.60	0.00	0.00	13.69	85.30	115.88
Aylesford	52.26	35.41	8.89	6.83	56.56	1.30	161.25
Bluewater Shopping Centre	33.29	20.68	40.57	69.58	56.56	2.42	223.09
Other outside the Borough	20.76	17.35	66.84	46.53	33.04	52.70	237.22
Other Total	136.74	124.78	333.03	375.64	212.23	166.68	1,349.11
TOTAL	357.97	237.68	386.35	426.87	297.66	186.24	1,892.76

Source: Tables 3 and 4

Table 6 - Short term 2023 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2023	362.28	240.05	387.03	419.07	300.98	185.37	1,894.78
Maidstone town centre	171.00	85.22	49.93	40.23	71.33	17.24	434.94
Maidstone out of centre urban area	45.29	18.48	3.48	9.64	12.94	1.67	91.50
Other Maidstone Borough	7.61	10.32	0.00	0.42	2.11	0.56	21.01
Maidstone Borough Total	223.89	114.02	53.41	50.29	86.38	19.46	547.46
Canterbury	4.71	1.92	19.35	1.68	3.31	2.22	33.19
Medway	8.33	10.08	39.86	237.61	30.70	0.00	326.59
Sittingbourne	2.54	7.92	152.10	5.45	0.00	0.00	168.01
Ashford	8.69	17.28	5.81	3.35	6.92	10.01	52.07
Tonbridge	2.17	1.92	0.00	0.00	12.04	12.61	28.74
Tunbridge Wells	4.35	12.72	0.00	0.00	13.85	84.90	115.81
Aylesford	52.89	35.77	8.90	6.71	57.19	1.30	162.75
Bluewater Shopping Centre	33.69	20.88	40.64	68.31	57.19	2.41	223.12
Other outside the Borough	21.01	17.52	66.96	45.68	33.41	52.46	237.04
Other Total	138.39	126.02	333.62	368.78	214.60	165.91	1,347.32
TOTAL	362.28	240.05	387.03	419.07	300.98	185.37	1,894.78

Source: Tables 3 and 4

Table 7 - Medium term 2027 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	406.44	269.01	434.90	458.94	338.94	204.84	2,113.08
Maidstone town centre	191.84	95.50	56.10	44.06	80.33	19.05	486.88
Maidstone out of centre urban area	50.81	20.71	3.91	10.56	14.57	1.84	102.41
Other Maidstone Borough	8.54	11.57	0.00	0.46	2.37	0.61	23.55
Maidstone Borough Total	251.18	127.78	60.02	55.07	97.28	21.51	612.84
Canterbury	5.28	2.15	21.74	1.84	3.73	2.46	37.20
Medway	9.35	11.30	44.79	260.22	34.57	0.00	360.23
Sittingbourne	2.85	8.88	170.91	5.97	0.00	0.00	188.60
Ashford	9.75	19.37	6.52	3.67	7.80	11.06	58.18
Tonbridge	2.44	2.15	0.00	0.00	13.56	13.93	32.08
Tunbridge Wells	4.88	14.26	0.00	0.00	15.59	93.82	128.55
Aylesford	59.34	40.08	10.00	7.34	64.40	1.43	182.60
Bluewater Shopping Centre	37.80	23.40	45.66	74.81	64.40	2.66	248.74
Other outside the Borough	23.57	19.64	75.24	50.02	37.62	57.97	264.07
Other Total	155.26	141.23	374.88	403.87	241.67	183.34	1,500.24
TOTAL	406.44	269.01	434.90	458.94	338.94	204.84	2,113.08

Source: Tables 3 and 4

Table 8 - Future long term comparison goods market shares by zone (%) - with garden settlements

Destination	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6
Maidstone town centre	47.2%	20.0%	55.0%	35.5%	12.9%	9.6%	23.7%	9.3%
Maidstone out of centre urban area	12.5%	5.0%	10.0%	7.5%	0.9%	2.3%	4.3%	0.9%
Other Maidstone Borough	2.1%	0.0%	5.0%	4.2%	0.0%	0.1%	0.7%	0.3%
Lidsing Garden Settlement	0.0%	10.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Heathlands Garden Settlement	0.0%	0.0%	20.0%	0.5%	0.0%	0.0%	0.0%	0.3%
Maidstone Borough Total	61.8%	35.0%	90.0%	47.7%	13.8%	12.1%	28.7%	10.8%
Canterbury	1.3%	0.0%	0.0%	0.8%	5.0%	0.4%	1.1%	1.2%
Medway	2.3%	55.0%	0.0%	4.2%	10.3%	56.6%	10.2%	0.0%
Sittingbourne	0.7%	0.0%	0.0%	3.3%	39.3%	1.3%	0.0%	0.0%
Ashford	2.4%	0.0%	5.0%	7.0%	1.5%	0.8%	2.3%	5.2%
Tonbridge	0.6%	0.0%	0.0%	0.8%	0.0%	0.0%	4.0%	6.8%
Tunbridge Wells	1.2%	0.0%	0.0%	5.3%	0.0%	0.0%	4.6%	45.8%
Aylesford	14.6%	2.0%	0.0%	14.9%	2.3%	1.6%	19.0%	0.7%
Bluewater Shopping Centre	9.3%	5.0%	2.0%	8.7%	10.5%	16.3%	19.0%	1.3%
Other outside the Borough	5.8%	3.0%	3.0%	7.3%	17.3%	10.9%	11.1%	28.2%
Other Total	38.2%	65.0%	10.0%	52.3%	86.2%	87.9%	71.3%	89.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results) and Lichfields' estimates

Table 9 - Long term 2032 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	468.48	6.54	5.58	309.77	507.34	521.52	395.34	235.58	2,450.15
Maidstone town centre	221.12	1.31	3.07	109.97	65.45	50.07	93.70	21.91	566.58
Maidstone out of centre urban area	58.56	0.33	0.56	23.23	4.57	12.00	17.00	2.12	118.36
Other Maidstone Borough	9.84	0.00	0.28	13.01	0.00	0.52	2.77	0.71	27.12
Lidsing Garden Settlement	0.00	0.65	0.00	0.00	0.00	0.52	0.00	0.00	1.18
Heathlands Garden Settlement	0.00	0.00	1.12	1.55	0.00	0.00	0.00	0.71	3.37
Maidstone Borough Total	289.52	2.29	5.02	147.76	70.01	63.10	113.46	25.44	716.61
Canterbury	6.09	0.00	0.00	2.48	25.37	2.09	4.35	2.83	43.20
Medway	10.78	3.60	0.00	13.01	52.26	295.18	40.32	0.00	415.14
Sittingbourne	3.28	0.00	0.00	10.22	199.38	6.78	0.00	0.00	219.66
Ashford	11.24	0.00	0.28	21.68	7.61	4.17	9.09	12.25	66.33
Tonbridge	2.81	0.00	0.00	2.48	0.00	0.00	15.81	16.02	37.12
Tunbridge Wells	5.62	0.00	0.00	16.42	0.00	0.00	18.19	107.90	148.12
Aylesford	68.40	0.13	0.00	46.16	11.67	8.34	75.11	1.65	211.46
Bluewater Shopping Centre	43.57	0.33	0.11	26.95	53.27	85.01	75.11	3.06	287.41
Other outside the Borough	27.17	0.20	0.17	22.61	87.77	56.85	43.88	66.43	305.08
Other Total	178.96	4.25	0.56	162.01	437.32	458.42	281.88	210.14	1,733.54
TOTAL	468.48	6.54	5.58	309.77	507.34	521.52	395.34	235.58	2,450.15

Source: Tables 3 and 8

Table 10 - Long term 2037 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	536.84	14.88	18.31	354.77	594.63	598.02	462.12	272.46	2,852.01
Maidstone town centre	253.39	2.98	10.07	125.94	76.71	57.41	109.52	25.34	661.35
Maidstone out of centre urban area	67.10	0.74	1.83	26.61	5.35	13.75	19.87	2.45	137.72
Other Maidstone Borough	11.27	0.00	0.92	14.90	0.00	0.60	3.23	0.82	31.74
Lidsing Garden Settlement	0.00	1.49	0.00	0.00	0.00	0.60	0.00	0.00	2.09
Heathlands Garden Settlement	0.00	0.00	3.66	1.77	0.00	0.00	0.00	0.82	6.25
Maidstone Borough Total	331.77	5.21	16.48	169.22	82.06	72.36	132.63	29.43	839.15
Canterbury	6.98	0.00	0.00	2.84	29.73	2.39	5.08	3.27	50.29
Medway	12.35	8.18	0.00	14.90	61.25	338.48	47.14	0.00	482.29
Sittingbourne	3.76	0.00	0.00	11.71	233.69	7.77	0.00	0.00	256.93
Ashford	12.88	0.00	0.92	24.83	8.92	4.78	10.63	14.17	77.13
Tonbridge	3.22	0.00	0.00	2.84	0.00	0.00	18.48	18.53	43.07
Tunbridge Wells	6.44	0.00	0.00	18.80	0.00	0.00	21.26	124.79	171.29
Aylesford	78.38	0.30	0.00	52.86	13.68	9.57	87.80	1.91	244.49
Bluewater Shopping Centre	49.93	0.74	0.37	30.86	62.44	97.48	87.80	3.54	333.16
Other outside the Borough	31.14	0.45	0.55	25.90	102.87	65.18	51.29	76.83	354.21
Other Total	205.07	9.67	1.83	185.54	512.57	525.66	329.49	243.03	2,012.86
TOTAL	536.84	14.88	18.31	354.77	594.63	598.02	462.12	272.46	2,852.01

Source: Tables 3 and 8

Table 11 - Long term 2042 comparison goods expenditure patterns (£M)

Location	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	620.69	26.29	34.18	410.26	703.23	694.42	545.22	318.77	3,353.05
Maidstone town centre	292.96	5.26	18.80	145.64	90.72	66.66	129.22	29.65	778.91
Maidstone out of centre urban area	77.59	1.31	3.42	30.77	6.33	15.97	23.44	2.87	161.70
Other Maidstone Borough	13.03	0.00	1.71	17.23	0.00	0.69	3.82	0.96	37.44
Lidsing Garden Settlement	0.00	2.63	0.00	0.00	0.00	0.69	0.00	0.00	3.32
Heathlands Garden Settlement	0.00	0.00	6.84	2.05	0.00	0.00	0.00	0.96	9.84
Maidstone Borough Total	383.59	9.20	30.76	195.69	97.05	84.02	156.48	34.43	991.22
Canterbury	8.07	0.00	0.00	3.28	35.16	2.78	6.00	3.83	59.11
Medway	14.28	14.46	0.00	17.23	72.43	393.04	55.61	0.00	567.05
Sittingbourne	4.34	0.00	0.00	13.54	276.37	9.03	0.00	0.00	303.28
Ashford	14.90	0.00	1.71	28.72	10.55	5.56	12.54	16.58	90.54
Tonbridge	3.72	0.00	0.00	3.28	0.00	0.00	21.81	21.68	50.49
Tunbridge Wells	7.45	0.00	0.00	21.74	0.00	0.00	25.08	145.99	200.27
Aylesford	90.62	0.53	0.00	61.13	16.17	11.11	103.59	2.23	285.38
Bluewater Shopping Centre	57.72	1.31	0.68	35.69	73.84	113.19	103.59	4.14	390.18
Other outside the Borough	36.00	0.79	1.03	29.95	121.66	75.69	60.52	89.89	415.52
Other Total	237.10	17.09	3.42	214.56	606.18	610.40	388.74	284.34	2,361.83
TOTAL	620.69	26.29	34.18	410.26	703.23	694.42	545.22	318.77	3,353.05

Source: Tables 3 and 8

Table 12 - Summary of comparison goods expenditure 2019 to 2042 (£M)

	2019	2023	2027	2032	2037	2042
Available Expenditure						
Maidstone urban area	522.84	526.44	589.29	684.94	799.07	940.61
Other Maidstone Borough	20.81	21.01	23.55	27.12	31.74	37.44
Lidsing Garden Settlement	0.00	0.00	0.00	1.18	2.09	3.32
Heathlands Garden Settlement	0.00	0.00	0.00	3.37	6.25	9.84
Total	543.64	547.46	612.84	716.61	839.15	991.22
Turnover of Existing Facilities						
Maidstone urban area	522.84	572.73	644.61	732.89	833.25	947.35
Other Maidstone Borough	20.81	21.18	23.84	27.10	30.81	35.03
Lidsing Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Heathlands Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Total	543.64	593.91	668.45	759.99	864.06	982.38
Surplus Expenditure (£m)						
Maidstone urban area	0.00	-46.29	-55.33	-47.94	-34.18	-6.74
Other Maidstone Borough	0.00	-0.17	-0.29	0.02	0.92	2.41
Lidsing Garden Settlement	0.00	0.00	0.00	1.18	2.09	3.32
Heathlands Garden Settlement	0.00	0.00	0.00	3.37	6.25	9.84
Total	0.00	-46.46	-55.62	-43.38	-24.91	8.83

Source: Tables 5 to 11 and Experian growth in retail sales densities (Figure 4b - Retail Planner Briefing Note 18)

(1) M&S store at Eclipse Park added at 2023. Comparison goods turnover of £40.5 million (from applicant's RIA)

Table 13 - Maidstone comparison goods floorspace capacity up to 2042

	2019	2023	2027	2032	2037	2042
Turnover density new floorspace (£ per sq.m) (1)	£7,000	£7,126	£8,020	£9,118	£10,367	£11,787
Floorspace Projection (sq.m net)						
Maidstone urban area	0	-6,496	-6,899	-5,258	-3,297	-572
Other Maidstone Borough	0	-24	-36	2	89	204
Lidsing Garden Settlement	0	0	0	129	201	282
Heathlands Garden Settlement	0	0	0	370	603	835
Total	0	-6,520	-6,935	-4,757	-2,403	749
Floorspace Projection (sq.m gross) (2)						
Maidstone urban area	0	-8,120	-8,623	-6,572	-4,121	-715
Other Maidstone Borough	0	-30	-45	3	111	255
Lidsing Garden Settlement	0	0	0	161	251	352
Heathlands Garden Settlement	0	0	0	462	754	1,044
Total	0	-8,149	-8,668	-5,946	-3,004	937

Source: Table 12 and Experian growth in retail sales densities (Figure 4b - Retail Planner Briefing Note 18)

(1) Average sales density for new floorspace assumed at £7,000 per sq.m net in 2019 based on existing trading performance

(2) Net to gross ratio 80% as existing assumed.

Appendix 3 Food/Beverage Assessment

Table 1 - Study area population

Zone	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	110,043	114,829	118,471	120,975	121,841	122,623
Zone 2a - Lidsing Garden Settlement	0	0	0	1,547	3,094	4,760
Zone 2b - Heathlands Garden Settlement	0	0	0	1,320	3,808	6,188
Zone 2c - Maidstone Rural	61,783	64,337	66,306	67,641	68,086	68,535
Zone 3 - Swale	123,824	127,896	132,162	136,586	140,704	144,844
Zone 4 - Medway	138,792	140,489	141,488	142,439	143,554	145,102
Zone 5 - Tonbridge/Malling	84,774	88,384	91,531	94,580	97,169	99,792
Zone 6 - Tunbridge/Ashford Rural	47,796	49,052	49,848	50,788	51,625	52,575
Total	567,012	584,987	599,806	615,876	629,881	644,419

Sources:

Experian Population Projections (2019 base)

Garden Settlements

Lidsing - 1,300 dwellings by 2037 - start 2027 average of 130 dwellings per annum at 2.38 people per dwelling

Heathland - 2,800 dwellings by 2042 - start 2029 average of 200 dwellings per annum at 2.38 people per dwelling

Table 2 - Food and beverage expenditure per person per annum (£)

	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	1,416	1,273	1,427	1,492	1,561	1,632
Zone 2a - Lidsing Garden Settlement	1,489	1,338	1,501	1,569	1,641	1,716
Zone 2b - Heathlands Garden Settlement	1,489	1,338	1,501	1,569	1,641	1,716
Zone 2c - Maidstone Rural	1,562	1,404	1,574	1,646	1,722	1,801
Zone 3 - Swale	1,301	1,169	1,311	1,371	1,434	1,500
Zone 4 - Medway	1,323	1,189	1,333	1,394	1,458	1,525
Zone 5 - Tonbridge/Malling	1,508	1,355	1,520	1,589	1,662	1,738
Zone 6 - Tunbridge/Ashford Rural	1,537	1,382	1,549	1,620	1,694	1,772

Sources:

Experian Local Expenditure 2019 (2019 prices)

Experian Retail Planner Briefing Note 18 (October 2020)

Table 3 - Total food and beverage expenditure (£m)

	2019	2023	2027	2032	2037	2042
Zone 1 - Maidstone Central	155.82	146.15	169.06	180.54	190.16	200.15
Zone 2a - Lidsing Garden Settlement	0.00	0.00	0.00	2.43	5.08	8.17
Zone 2b - Heathlands Garden Settlement	0.00	0.00	0.00	2.07	6.25	10.62
Zone 2c - Maidstone Rural	96.51	90.33	104.37	111.35	117.22	123.40
Zone 3 - Swale	161.10	149.56	173.28	187.28	201.77	217.22
Zone 4 - Medway	183.62	167.07	188.64	198.61	209.33	221.29
Zone 5 - Tonbridge/Malling	127.84	119.80	139.10	150.32	161.51	173.47
Zone 6 - Tunbridge/Ashford Rural	73.46	67.77	77.21	82.27	87.46	93.15
Study Area Total	798.34	740.69	851.65	914.87	978.78	1,047.46

Source: Tables 1 and 2

Table 4 - Base year 2019 food and beverage market shares by zone (%)

Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Maidstone urban area	74.2%	49.9%	10.8%	13.6%	22.4%	2.4%
Other Maidstone Borough	11.7%	22.7%	2.5%	1.0%	1.8%	2.4%
Maidstone Borough Total	85.9%	72.6%	13.3%	14.6%	24.2%	4.8%
Canterbury	2.8%	0.3%	3.4%	0.8%	0.9%	0.0%
Medway	0.2%	1.8%	4.0%	48.3%	8.4%	0.0%
Sittingbourne	0.0%	4.4%	40.4%	2.2%	0.0%	0.0%
Faversham	0.2%	0.0%	3.3%	0.5%	0.6%	0.6%
Ashford	1.1%	2.6%	2.5%	0.0%	0.0%	1.9%
Tonbridge	0.5%	0.0%	0.0%	0.0%	2.2%	4.7%
Tunbridge Wells	0.0%	2.6%	0.0%	0.0%	3.8%	29.5%
Aylesford	0.8%	0.3%	0.0%	0.0%	5.9%	0.0%
Bluewater Shopping Centre	2.0%	1.2%	3.9%	6.2%	5.4%	0.7%
West Malling	0.0%	0.7%	0.0%	0.5%	21.4%	0.0%
Other outside the Borough	6.5%	13.5%	29.2%	26.9%	27.2%	57.8%
Other Total	14.1%	27.4%	86.7%	85.4%	75.8%	95.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results)

Table 5 - Base year 2019 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	155.82	96.51	161.10	183.62	127.84	73.46	798.34
Maidstone urban area	115.62	48.16	17.40	24.97	28.64	1.76	236.55
Other Maidstone Borough	18.23	21.91	4.03	1.84	2.30	1.76	50.07
Maidstone Borough Total	133.85	70.06	21.43	26.81	30.94	3.53	286.61
Canterbury	4.36	0.29	5.48	1.47	1.15	0.00	12.75
Medway	0.31	1.74	6.44	88.69	10.74	0.00	107.92
Sittingbourne	0.00	4.25	65.08	4.04	0.00	0.00	73.37
Faversham	0.31	0.00	5.32	0.92	0.77	0.44	7.75
Ashford	1.71	2.51	4.03	0.00	0.00	1.40	9.65
Tonbridge	0.78	0.00	0.00	0.00	2.81	3.45	7.04
Tunbridge Wells	0.00	2.51	0.00	0.00	4.86	21.67	29.04
Aylesford	1.25	0.29	0.00	0.00	7.54	0.00	9.08
Bluewater Shopping Centre	3.12	1.16	6.28	11.38	6.90	0.51	29.36
West Malling	0.00	0.68	0.00	0.92	27.36	0.00	28.95
Other outside the Borough	10.13	13.03	47.04	49.39	34.77	42.46	196.82
Other Total	21.97	26.44	139.67	156.81	96.90	69.94	511.73
TOTAL	155.82	96.51	161.10	183.62	127.84	73.46	798.34

Source: Tables 3 and 4

Table 6 - Short term 2023 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2023	146.15	90.33	149.56	167.07	119.80	67.77	740.69
Maidstone urban area	108.45	45.07	16.15	22.72	26.84	1.63	220.86
Other Maidstone Borough	17.10	20.51	3.74	1.67	2.16	1.63	46.80
Maidstone Borough Total	125.55	65.58	19.89	24.39	28.99	3.25	267.65
Canterbury	4.09	0.27	5.09	1.34	1.08	0.00	11.86
Medway	0.29	1.63	5.98	80.69	10.06	0.00	98.66
Sittingbourne	0.00	3.97	60.42	3.68	0.00	0.00	68.07
Faversham	0.29	0.00	4.94	0.84	0.72	0.41	7.19
Ashford	1.61	2.35	3.74	0.00	0.00	1.29	8.98
Tonbridge	0.73	0.00	0.00	0.00	2.64	3.19	6.55
Tunbridge Wells	0.00	2.35	0.00	0.00	4.55	19.99	26.89
Aylesford	1.17	0.27	0.00	0.00	7.07	0.00	8.51
Bluewater Shopping Centre	2.92	1.08	5.83	10.36	6.47	0.47	27.14
West Malling	0.00	0.63	0.00	0.84	25.64	0.00	27.11
Other outside the Borough	9.50	12.19	43.67	44.94	32.59	39.17	182.06
Other Total	20.61	24.75	129.67	142.68	90.81	64.51	473.03
TOTAL	146.15	90.33	149.56	167.07	119.80	67.77	740.69

Source: Tables 3 and 4

Table 7 - Medium term 2027 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	169.06	104.37	173.28	188.64	139.10	77.21	851.65
Maidstone urban area	125.44	52.08	18.71	25.66	31.16	1.85	254.90
Other Maidstone Borough	19.78	23.69	4.33	1.89	2.50	1.85	54.05
Maidstone Borough Total	145.22	75.77	23.05	27.54	33.66	3.71	308.95
Canterbury	4.73	0.31	5.89	1.51	1.25	0.00	13.70
Medway	0.34	1.88	6.93	91.11	11.68	0.00	111.95
Sittingbourne	0.00	4.59	70.00	4.15	0.00	0.00	78.75
Faversham	0.34	0.00	5.72	0.94	0.83	0.46	8.30
Ashford	1.86	2.71	4.33	0.00	0.00	1.47	10.37
Tonbridge	0.85	0.00	0.00	0.00	3.06	3.63	7.53
Tunbridge Wells	0.00	2.71	0.00	0.00	5.29	22.78	30.78
Aylesford	1.35	0.31	0.00	0.00	8.21	0.00	9.87
Bluewater Shopping Centre	3.38	1.25	6.76	11.70	7.51	0.54	31.14
West Malling	0.00	0.73	0.00	0.94	29.77	0.00	31.44
Other outside the Borough	10.99	14.09	50.60	50.74	37.83	44.63	208.88
Other Total	23.84	28.60	150.23	161.10	105.44	73.50	542.71
TOTAL	169.06	104.37	173.28	188.64	139.10	77.21	851.65

Source: Tables 3 and 4

Table 8 - Long term food and beverage market shares by zone (%) - with Garden Settlements

Destination	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6
Maidstone urban area	74.2%	20.0%	35.0%	49.9%	10.8%	13.6%	22.4%	2.4%
Other Maidstone Borough	11.7%	5.0%	10.0%	22.7%	2.5%	1.0%	1.8%	2.4%
Lidsing Garden Settlement	0.0%	20.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Heathlands Garden Settlement	0.0%	0.0%	40.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Maidstone Borough Total	85.9%	45.0%	85.0%	72.6%	13.3%	14.8%	24.2%	5.8%
Canterbury	2.8%	0.0%	0.0%	0.3%	3.4%	0.8%	0.9%	0.0%
Medway	0.2%	55.0%	0.0%	1.8%	4.0%	48.1%	8.4%	0.0%
Sittingbourne	0.0%	0.0%	0.0%	4.4%	40.4%	2.2%	0.0%	0.0%
Faversham	0.2%	0.0%	0.0%	0.0%	3.3%	0.5%	0.6%	0.6%
Ashford	1.1%	0.0%	5.0%	2.6%	2.5%	0.0%	0.0%	1.8%
Tonbridge	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	4.7%
Tunbridge Wells	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	3.8%	29.5%
Aylesford	0.8%	0.0%	0.0%	0.3%	0.0%	0.0%	5.9%	0.0%
Bluewater Shopping Centre	2.0%	0.0%	0.0%	1.2%	3.9%	6.2%	5.4%	0.7%
West Malling	0.0%	0.0%	0.0%	0.7%	0.0%	0.5%	21.4%	0.0%
Other outside the Borough	6.5%	0.0%	10.0%	13.5%	29.2%	26.9%	27.2%	56.9%
Other Total	14.1%	55.0%	15.0%	27.4%	86.7%	85.2%	75.8%	94.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey August 2019 (weighted results)

Table 9 - Long term 2032 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	180.54	2.43	2.07	111.35	187.28	198.61	150.32	82.27	914.87
Maidstone urban area	133.96	0.49	0.73	55.56	20.23	27.01	33.67	1.97	273.62
Other Maidstone Borough	21.12	0.12	0.21	25.28	4.68	1.99	2.71	1.97	58.08
Lidsing Garden Settlement	0.00	0.49	0.00	0.00	0.00	0.40	0.00	0.00	0.88
Heathlands Garden Settlement	0.00	0.00	0.83	0.00	0.00	0.00	0.00	0.82	1.65
Maidstone Borough Total	155.08	1.09	1.76	80.84	24.91	29.39	36.38	4.77	334.23
Canterbury	5.06	0.00	0.00	0.33	6.37	1.59	1.35	0.00	14.70
Medway	0.36	1.34	0.00	2.00	7.49	95.53	12.63	0.00	119.35
Sittingbourne	0.00	0.00	0.00	4.90	75.66	4.37	0.00	0.00	84.93
Faversham	0.36	0.00	0.00	0.00	6.18	0.99	0.90	0.49	8.93
Ashford	1.99	0.00	0.10	2.90	4.68	0.00	0.00	1.48	11.15
Tonbridge	0.90	0.00	0.00	0.00	0.00	0.00	3.31	3.87	8.08
Tunbridge Wells	0.00	0.00	0.00	2.90	0.00	0.00	5.71	24.27	32.88
Aylesford	1.44	0.00	0.00	0.33	0.00	0.00	8.87	0.00	10.65
Bluewater Shopping Centre	3.61	0.00	0.00	1.34	7.30	12.31	8.12	0.58	33.26
West Malling	0.00	0.00	0.00	0.78	0.00	0.99	32.17	0.00	33.94
Other outside the Borough	11.74	0.00	0.21	15.03	54.69	53.43	40.89	46.81	222.79
Other Total	25.46	1.34	0.31	30.51	162.37	169.21	113.94	77.50	580.64
TOTAL	180.54	2.43	2.07	111.35	187.28	198.61	150.32	82.27	914.87

Source: Tables 3 and 8

Table 10 - Long term 2037 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	190.16	5.08	6.25	117.22	201.77	209.33	161.51	87.46	978.78
Maidstone urban area	141.10	1.02	2.19	58.49	21.79	28.47	36.18	2.10	291.33
Other Maidstone Borough	22.25	0.25	0.62	26.61	5.04	2.09	2.91	2.10	61.88
Lidsing Garden Settlement	0.00	1.02	0.00	0.00	0.00	0.42	0.00	0.00	1.43
Heathlands Garden Settlement	0.00	0.00	2.50	0.00	0.00	0.00	0.00	0.87	3.37
Maidstone Borough Total	163.35	2.29	5.31	85.10	26.83	30.98	39.09	5.07	358.02
Canterbury	5.32	0.00	0.00	0.35	6.86	1.67	1.45	0.00	15.66
Medway	0.38	2.79	0.00	2.11	8.07	100.69	13.57	0.00	127.61
Sittingbourne	0.00	0.00	0.00	5.16	81.51	4.61	0.00	0.00	91.28
Faversham	0.38	0.00	0.00	0.00	6.66	1.05	0.97	0.52	9.58
Ashford	2.09	0.00	0.31	3.05	5.04	0.00	0.00	1.57	12.07
Tonbridge	0.95	0.00	0.00	0.00	0.00	0.00	3.55	4.11	8.61
Tunbridge Wells	0.00	0.00	0.00	3.05	0.00	0.00	6.14	25.80	34.99
Aylesford	1.52	0.00	0.00	0.35	0.00	0.00	9.53	0.00	11.40
Bluewater Shopping Centre	3.80	0.00	0.00	1.41	7.87	12.98	8.72	0.61	35.39
West Malling	0.00	0.00	0.00	0.82	0.00	1.05	34.56	0.00	36.43
Other outside the Borough	12.36	0.00	0.62	15.82	58.92	56.31	43.93	49.76	237.73
Other Total	26.81	2.79	0.94	32.12	174.93	178.35	122.42	82.39	620.76
TOTAL	190.16	5.08	6.25	117.22	201.77	209.33	161.51	87.46	978.78

Source: Tables 3 and 8

Table 11 - Long term 2042 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2a Lidsing	Zone 2b Heathlands	Zone 2c	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	200.15	8.17	10.62	123.40	217.22	221.29	173.47	93.15	1,047.46
Maidstone urban area	148.51	1.63	3.72	61.58	23.46	30.09	38.86	2.24	310.09
Other Maidstone Borough	23.42	0.41	1.06	28.01	5.43	2.21	3.12	2.24	65.90
Lidsing Garden Settlement	0.00	1.63	0.00	0.00	0.00	0.44	0.00	0.00	2.08
Heathlands Garden Settlement	0.00	0.00	4.25	0.00	0.00	0.00	0.00	0.93	5.18
Maidstone Borough Total	171.93	3.68	9.03	89.59	28.89	32.75	41.98	5.40	383.25
Canterbury	5.60	0.00	0.00	0.37	7.39	1.77	1.56	0.00	16.69
Medway	0.40	4.49	0.00	2.22	8.69	106.44	14.57	0.00	136.81
Sittingbourne	0.00	0.00	0.00	5.43	87.76	4.87	0.00	0.00	98.05
Faversham	0.40	0.00	0.00	0.00	7.17	1.11	1.04	0.56	10.27
Ashford	2.20	0.00	0.53	3.21	5.43	0.00	0.00	1.68	13.05
Tonbridge	1.00	0.00	0.00	0.00	0.00	0.00	3.82	4.38	9.19
Tunbridge Wells	0.00	0.00	0.00	3.21	0.00	0.00	6.59	27.48	37.28
Aylesford	1.60	0.00	0.00	0.37	0.00	0.00	10.23	0.00	12.21
Bluewater Shopping Centre	4.00	0.00	0.00	1.48	8.47	13.72	9.37	0.65	37.69
West Malling	0.00	0.00	0.00	0.86	0.00	1.11	37.12	0.00	39.09
Other outside the Borough	13.01	0.00	1.06	16.66	63.43	59.53	47.18	53.00	253.87
Other Total	28.22	4.49	1.59	33.81	188.33	188.54	131.49	87.75	664.22
TOTAL	200.15	8.17	10.62	123.40	217.22	221.29	173.47	93.15	1,047.46

Source: Tables 3 and 8

Table 12 - Summary of food and beverage expenditure 2019 to 2042 (£M)

Area	2019	2023	2027	2032	2037	2042
Available expenditure						
Maidstone urban area	236.55	220.86	254.90	273.62	291.33	310.09
Other Maidstone Borough	50.07	46.80	54.05	58.08	61.88	65.90
Lidsing Garden Settlement	0.00	0.00	0.00	0.88	1.43	2.08
Heathlands Garden Settlement	0.00	0.00	0.00	1.65	3.37	5.18
Total	286.61	267.65	308.95	334.23	358.02	383.25
Turnover of existing facilities						
Maidstone urban area	236.55	236.55	236.55	248.61	261.29	274.62
Other Maidstone Borough	50.07	50.07	50.07	52.62	55.30	58.12
Lidsing Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Heathlands Garden Settlement	0.00	0.00	0.00	0.00	0.00	0.00
Total	286.61	286.61	286.61	301.23	316.60	332.75

Source: Tables 5 to 10

(1) turnover density of existing floorspace constant up to 2027 and increased at 1% per annum thereafter.

Table 13 - Food and Beverage Floorspace Capacity up to 2037

	2019	2023	2027	2032	2037	2042
Surplus/Deficit Expenditure (£m)						
Maidstone urban area	0.00	-15.69	18.36	25.01	30.04	35.47
Other Maidstone Borough	0.00	-3.27	3.98	5.46	6.58	7.78
Lidsing Garden Settlement	0.00	0.00	0.00	0.88	1.43	2.08
Heathlands Garden Settlement	0.00	0.00	0.00	1.65	3.37	5.18
TOTAL	0.00	-18.96	22.34	33.00	41.43	50.50
Turnover Density New Floorspace (£ per sq.m) (1)	£5,000	£5,203	£5,414	£5,690	£5,981	£6,286
Floorspace Projection (sq.m gross)						
Maidstone urban area	0	-3,015	3,390	4,394	5,023	5,642
Other Maidstone Borough	0	-628	735	959	1,100	1,237
Lidsing Garden Settlement	0	0	0	155	240	330
Heathlands Garden Settlement	0	0	0	290	564	824
TOTAL	0	-3,643	4,126	5,799	6,927	8,034

Source: Table 12

(1) average sales density of new floorspace assumed at £5,000 per sq.m gross at 2019 increased at 1% per annum

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