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# Folkestone & Hythe Retail and Leisure Need Assessment

## 2018 Update

Folkestone & Hythe District Council

10 December 2018

LICHFIELDS

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# 1.0 Introduction

## Background

1.1 Lichfields was commissioned by Folkestone & Hythe District Council (previously Shepway District Council) to undertake a partial update of the Shepway Town Centres Study 2015 (prepared by Peter Brett Associates), incorporating emerging Garden Settlement development proposals at Otterpool Park. The objectives of the Shepway Town Centres Study 2015 were to:

1. review the health of the District's main centres, and make recommendations to improve their vitality and vitality;
2. analyse the current and future competitiveness of the retail centres, and the effectiveness of existing spatial strategies, as well as options for further planning policies, recommendations on town centre boundaries/retail frontages, the need to maintain anchor stores in towns and the potential implications of out of town development;
3. profile the optimal mix and balance of uses, including a sustainable diverse retail and leisure offer, reflecting the individuality of the District's centres;
4. quantify future retail development needs and formulate specific proposals that improve the range and quality of development in the District's centres, and where suitable, locations adjoining the centres;
5. identify barriers that exist to developing key town centre sites and measures for unlocking those sites, including advice on those with the capacity to deliver major/mixed use regeneration;
6. provide options on how more peripheral retail locations (such as underperforming secondary shopping areas) can be refocused to secure further investment or more beneficial uses;
7. advise on the most suitable opportunities for facilitating, where appropriate, growth in the evening economy;
8. recommend the deliverable development options for public sector land release opportunities (and adjacent land as appropriate) consistent with town centre regeneration objectives;
9. recommend local impact thresholds (if required); and
10. advise on how to meet other requirements of national policy in relation to town centres and the specific implications for the District.

1.2 This report provides a partial update of the 2015 Study, and should be read alongside the previous 2015 report. This report updates the District wide retail capacity projections and need assessment, including:

1. an updated overview of retail and leisure trends;
2. an update of population projections based on the Office of National Statistics latest sub-national projections;
3. adoption of Experian's local expenditure data (2016 base year data) for the 7 study area zones, which replace the 2012 base year figures adopted in the 2015 Study;
4. adoption of Experian's latest (December 2017) expenditure growth projections and home shopping projections (special forms of trading - SFT);
5. revised retail sales floorspace for main food stores in the District based on the latest ORC StorePoint 2018 database;

6 benchmark turnover estimates for existing and proposed food store floorspace based on company average sales densities provided by Global Data 2018 information;

7 Experian's latest growth forecast for home shopping/special forms of trading and growth in turnover efficiencies;

8 an update on major pipeline developments that are likely to affect future shopping and leisure patterns within the District;

9 adjustments to market shares (as necessary) accounting for the impact implications of any changes since 2014; and

10 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met, including the role that the new Garden Settlement at Otterpool Park can play in meeting this need.

1.3 In summary, the output of the above will be an update of Sections 2, 6 and 7 of the previous 2015 Study, including the quantitative capacity retail and leisure tables in set out in Appendix B and C. The update will identify the scope for retail and leisure uses up to 2037. Recommendations will be provided on how this growth could be accommodated, based on a review of the latest position on allocations and commitments and the emerging Otterpool Park proposals.

# 2.0 Recent changes and retail trends

## Introduction

2.1 This section considers the changes in the retail and leisure sector nationally and the implications for Folkestone & Hythe District. It also sets out a brief overview of the key changes in national planning policy since the previous 2015 Study was prepared.

## National planning policy

2.2 The previous 2015 Study was prepared based on the guidance set out in the National Planning Policy Framework 2012 (NPPF). Since then, a revised NPPF has been published (July 2018) which consolidates a series of proposals that have been made in the last two and half years, and which have been included in various consultation documents. The policies in the revised NPPF are material considerations when determining planning applications 'from the day of its publication' (i.e. from 24 July 2018). The policies in the 2012 NPPF still apply to examining plans submitted on or before 24 January 2019.

2.3 In relation to town centres, the revised NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years. The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the final version of 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'.

2.4 It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

2.5 A key change (para. 86 – <u>change underlined</u>) is *"main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (<u>or expected to become available within a reasonable period</u>) should out of centre sites be considered"*. The reason for this change is to avoid prejudicing more central sites that are in the pipeline but not available straight away. The definition of a "reasonable period" is still open to debate, but logically this period should relate to the likely timetable for delivery of the application proposal.

## General Permitted Development Order

2.6 Recent changes to the General Permitted Development Order (GPDO) have also had an impact on some town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures can change the composition of town centres, including the amount of Class A1 space is likely to reduce in some centres. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages where there are concentrations of smaller units, but conversely it could have an impact on the ability of operators to find space in areas where demand is higher.

2.7 In October 2018, The Ministry for Housing, Communities and Local Government published the *Planning Reform: Supporting the High Street for consultation and increasing the delivery of homes*. This document suggests further changes that, if carried through, will have implications for town centres and the ability to control the mix of uses.

## Retail trends

2.8 The economic downturn had a significant impact on the retail and leisure sectors, and continuing uncertainties are still having an effect. Many national operators failed (e.g. Austin Reed, BHS, Comet, HMV, JJB Sports, Jessops, Maplin, Clinton Cards, Woolworths, MFI, Toys R Us, Land of Leather, Borders, Game, Firetrap, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. The latest operators to experience difficulties include House of Fraser, New Look, Carpetright, Prezzo, Chimichanga, Strada, Byron, Marks & Spencer and Jamie Oliver, which indicate that market conditions are still challenging.

2.9 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators. To counteract the loss of market share from 'top 4' supermarket operators, Tesco is preparing to launch a new discount chain called 'Jack's'. Up to 60 stores could be launched with new stores being rolled out from September 2018.

2.10 Assessing future expenditure levels within this study needs to consider the likely speed of the economic recovery, particularly in the short and medium term (2018 to 2021 and 2021 to 2026). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long-term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be considered and a balanced approach taken. An overview of national trends within the retail sector is set out below.

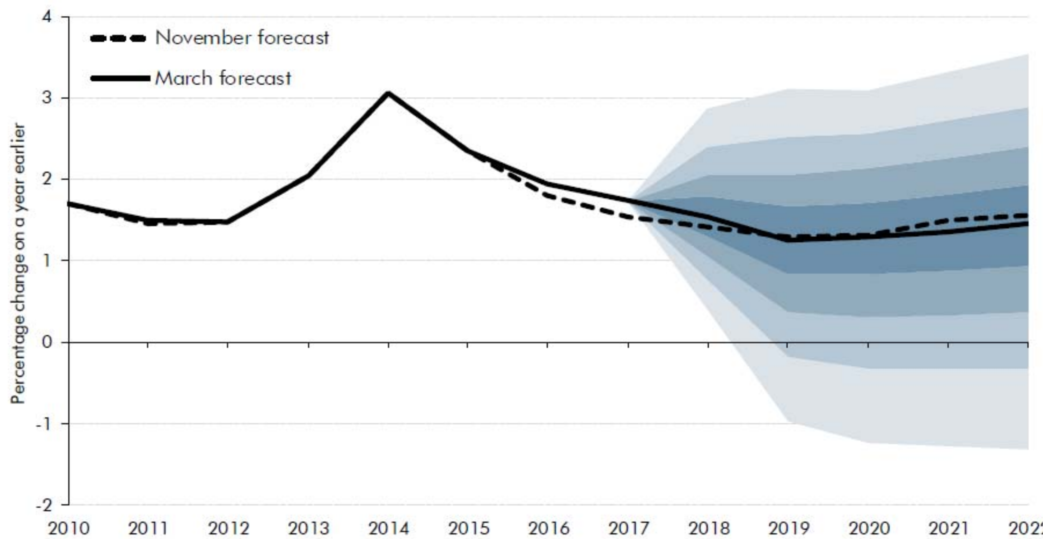
### Expenditure growth

2.11 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the impact of the EU Referendum is expected to result in slower growth in the short term and home shopping/internet spending is expected to grow at a faster rate than traditional forms of shopping.

2.12 After the recession in 2008/2009, growth improved and from 2012 grew to a +3% high in 2014 and +2% in 2015. The Office for Budget Responsibility's (OBR March 2018) figures for GDP show that real GDP growth slowed from +1.9% in 2016 to +1.7% in 2017 (and to +1.4% in the year to the fourth quarter of 2017). OBR expects growth of +1.5% in 2018, slowing a little more in 2019 to +1.3%, then picking up modestly over the subsequent three years. At +1.4% a year, the average growth rate over the forecast is unchanged from OBR's November 2017 figures.

2.13 The future is, of course, uncertain. One way of illustrating the uncertainty around GDP growth is shown Figure 2.1. This presents OBR's central forecast together with a fan showing the probability of different outcomes based on past errors on official forecasts. The solid black line shows the median forecast, with successive pairs of lighter shaded areas around it representing 20% probability bands.

Figure 2.1 Real GDP fan chart




Source: OBR Economic and Fiscal Outlook – March 2018

2.14 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the last economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. The growth in the demand for floorspace is expected to slow, particularly in the short term. These national trends are anticipated to be mirrored in Folkestone & Hythe District.

2.15 For convenience goods, Experian's forecasts (December 2017) anticipate limited growth (0.1% per annum) from 2020. For comparison goods, higher levels of growth are expected in the future (3.2% per annum from 2020), 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.

2.16 Experian's latest expenditure projections consider the implications of Brexit, indicating this has created major uncertainties regarding the long-term outlook for the UK economy. Experian's baseline forecasts reflect a small downgrade in the UK's long-term projections for trade, investment and GDP. However, the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.2% to 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 15 (December 2017) states:

*"The expansion in comparison goods volumes, averaging 3.2% per head to 2036, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.*

*Convenience goods enjoyed the strongest rise in the decade during 2016, buoyed by the overall buoyancy in spending. Growth has since slowed but remains above the long-term trend over the period 1997 to 2015 averaging – 1.2% per head a year. Our central forecast has a renewed* *squeeze in convenience goods in the short term, before sales per head growth settles at 0.2% a year from 2020 to 2036."*

2.17 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. Because of these trends, the national average shop vacancy rate (based on Goad plan data) has increased from around 10% in 2005 to about 14% in 2012. Vacancy rates have gradually improved to 11.8% in 2018.

## New forms of retailing

2.18 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping 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. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to influence retailing in the high street and from traditional stores. National trends within this sector will have implications for retailing within Folkestone & Hythe, because they will affect the amount of expenditure growth that will be potentially available to support development and the strength of operator demand for new floorspace.

### Special forms of trading/home shopping

2.19 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 15 (December 2017) states:

*"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 16.5% of total retail sales….*

*…The rising share of internet sales in total retail transactions dominates the picture of SFT. Based on data for the first ten months of the year, internet sales' share of total retail is expected to come in at roughly 14% in 2017, against 4.7% in 2008.*

*…non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. According to Internet World Stats there, as of June 30 2017, were an estimated 62.1 million internet users in the UK (representing 94.8% of the population). Growth of the internet user base will thus be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching almost 20% by 2022 rising to 20.5% by the mid-2030s."*

2.20 This update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.

2.21 The implications of these trends on the demand for retail space have been considered. Some retailers operate online sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in online sales may not always mean there is a reduction in the need for traditional retail floorspace.

2.22 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

### Food store operators

2.23 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

2.24 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 88% between 2011 and 2015, compared to the number of larger format stores which increased by 37% over the same period. The number of Little Waitrose trebled between 2011 and 2015.

2.25 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customer's shopping habits.

2.26 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. The discount sector is actively expanding. Aldi, Lidl and possibly Tesco's 'Jacks' format may look for further opportunities in Folkestone & Hythe District in the future.

### Comparison retailers

2.27 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct have also expanded out-of-centre. To date, this has not been evident in Folkestone & Hythe District, given the limited provision of out of centre retail warehouses and the lack of larger centres in the District.

2.28 The main concentration of out-of-centre retail floorspace in Folkestone & Hythe District is at the Park Farm area of Folkestone (off Junction 13 of the M20). Retailers include Carpet Right, Bensons for Beds, Halfords, Home Bargains, Pets at Home, Homebase, Wickes, Sainsbury's, B&M (with garden centre), Curry's and McDonalds. The Range is in the Firs Lane area, adjacent to Junction 12 of the M20.

2.29 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The composition of the retail park should continue to be monitored and controlled if necessary.

2.30 Within town centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres. In general operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger centres, e.g. Ashford, Dover and Canterbury outside of the District. The largest town in the District is Folkestone, where operator demand is constrained due to its position in the hierarchy. Notwithstanding this, Bouverie Place offers larger format units, and is anchored by

ASDA, with other occupiers including Primark, TK Maxx, New Look and Poundland. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.

2.31 The continuation of these trends will influence future operator requirements in Folkestone & Hythe District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

## Charity and discount shops

2.32 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within Class A1, the same category as other shops. In many centres, charity shops have occupied vacated shop premises during the recession. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

## Non-retail services

2.33 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities, and has resulted in a change to permitted development rights to control the growth of these uses in town centres.

2.34 Recent changes to the GPDO has had an impact on some town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 uses to Class A2 uses. These measures can change the composition of town centres e.g. the amount of Class A1 space has reduced. However, these measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages. Conversely, it could have an impact on the ability of operators to find space, in areas where demand is higher.

## Food and beverage uses

2.35 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- Class A1 services cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- Class A2 services include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- Class A3/A5 including restaurants, cafes (A3) and takeaways (A5).
- Class A4 pubs/bars (Class A4).

2.36 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage. Recently some chains have experienced difficulties resulting in closures, which should operators may have over-stretched.

2.37 These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

2.38 The key categories for food and beverage offers are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- **Casual dining/leisure dining:** incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

## Summary

2.39 These trends, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate increased to over 14% during the last recession, but has not returned to pre-recession levels (around 8%). The national vacancy rate remains around 11%, and therefore a cautious approach to future growth is required.

2.40 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

# 3.0 Retail and food/beverage capacity assessment

3.1 This section objectively assesses the quantitative scope for new retail and food/beverage floorspace in Folkestone & Hythe District in the period from 2018 to 2037. The 2015 study provided projections between 2014 and 2031, and therefore the results are not directly comparable.

3.2 This section and Appendix 1 sets out the methodology adopted and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping, together with food and beverage spending.

## Methodology and base data

### Price base

3.3 All monetary values expressed in this study are at 2016 prices, consistent with Experian's most up to date base year expenditure figures for 2016 (Experian Briefing Note 15, December 2017).

### Study area

3.4 The quantitative analysis is based on the defined study area and sub-zones in the 2015 Study. These cover the catchment areas of the main shopping destinations in Folkestone & Hythe. The study area is shown in Appendix 1. There will be retail expenditure leakage from the study area to centres outside, but conversely there will be expenditure inflow from surrounding areas.

## Population and expenditure

3.5 The study area population for 2018 to 2037 is set out in Tables 1A and 1B in Appendix 2. The Experian population projections have been obtained for each zone to 2037. These projections are in line with the Office of National Statistics (ONS) 2014 based projections. Consistent with these population projections and recognising the expected reduction in average household size, the Folkestone & Hythe Core Strategy Review (Regulation 18 draft) 2018 seeks to deliver a minimum of 12,200 new homes between 2018 and 2037, of which the plan expects 5,500 homes to be provided in the Garden Settlement development at Otterpool Park. The Core Strategy Review indicates that Otterpool Park has the potential to provide between 8,000 to 10,000 new homes beyond the plan period (subject to detailed masterplanning). The emerging Otterpool Park Masterplan indicative phasing suggests 6,375 homes could be completed by 2037, i.e. 875 more than that envisaged in the Core Strategy.

3.6 Table 1A set out the baseline population growth, including the minimum population growth expected to be accommodated at Otterpool Park (5,500 homes as outlined in the Core Strategy).

3.7 Table 1B assumes a faster completion rate at Otterpool Park, based on the provision of 6,375 dwellings by 2037 (as outlined in the Otterpool Park Masterplan). Table 1B is the high population growth scenario. An average of 2.1 people per home over and above the 5,500 new homes envisaged in the Core Strategy has been assumed.

3.8 For the baseline scenario, population within the study area is expected to increase between 2018 and 2037 by 13.6% (17,776 people). In terms of the emerging Otterpool Park proposals, the following phasing and population increase is assumed:

- 2022 - 280 dwellings (588 people)

- 2027 - 1,876 dwellings (3,940 people)
- 2032 - 3,602 dwellings (7,564 people)
- 2037 - 5,500 dwellings (11,550 people)

3.9 In the higher growth scenario, population within the study area is expected to increase between 2018 and 2037 by 15% (19,605 people). In terms of the emerging Otterpool Park proposals, the following phasing and population increase is assumed:

- 2022 - 325 dwellings (683 people)
- 2027 - 2,175 dwellings (4,568 people)
- 2032 - 4,175 dwellings (8,768 people)
- 2037 - 6,375 dwellings (13,388 people)

3.10 The baseline projections suggest population within the study area will increase from 130,933 in 2018 to 139,557 by 2027, and then to 148,700 by 2037. By way of comparison the 2015 Study suggested population would increase from 129,465 in 2018 to 136,318 in 2027. The updated population projection at 2027 is 2.4% higher. The pro-rata projection for 2031 (143,290) is 3.1% higher than the 2015 Study projection (139,011).

3.11 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2037. Forecasts for comparison goods and food/beverage are shown in Table 2 in Appendix 3 and Appendix 4 respectively.

3.12 Based on the population projections outlined above and growth in per capita spending, convenience goods spending within the study area is forecast to increase by 13.7% from £296.88 million in 2018 to £337.62 million in 2037, as shown in Table 3A (Appendix 2). Comparison goods spending is forecast to increase by 99.6% between 2018 and 2037, increasing from £434.96 million in 2018 to £868.45 million in 2037, as shown in Table 3A (Appendix 3). Food and beverage spending is forecast to increase by 41.9% between 2018 and 2037, increasing from £145.76 million in 2018 to £206.77 million in 2037, as shown in Table 3A (Appendix 4).

3.13 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and beverage does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. These figures relate to real growth and exclude inflation.

## Existing spending patterns

3.14 The results of the household shopper questionnaire survey undertaken by NEMS in May 2014 have been used to estimate base year shopping patterns within the study area zones. Retail completions between 2014 and 2018 have been assessed, and show that the net change in retail provision has not changed significantly i.e. to an extent that would lead to changes in market shares within each study area zone.

### Convenience shopping

3.15 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns for 2018. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.16 The level of convenience goods expenditure attracted to shops/stores in Folkestone & Hythe in 2018 is estimated to be £254.48 million as shown in Table 5, Appendix 2. The total benchmark turnover of the existing convenience sales floorspace within Folkestone & Hythe District is £256.54 million at 2016 (Table 10, Appendix 2). These figures suggest that collectively convenience retail facilities in the District are trading 0.8% below the average benchmark turnover, although there are variations within the District.

3.17 Existing convenience goods shopping provision appears to be trading 12% below benchmark in Zone 1 (Folkestone/Cheriton), but in other parts of the District facilities are trading 24% above benchmark.

### Comparison shopping

3.18 The results of the household shopper survey have been used to estimate existing comparison goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 3.

3.19 The estimated comparison goods expenditure currently attracted by shopping facilities within Folkestone & Hythe District is £266.52 million in 2018, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

### Food and beverage

3.20 The results of the household shopper survey have been used to estimate existing food and beverage spending patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 4.

3.21 The estimated food and beverage expenditure currently attracted by facilities within Folkestone & Hythe District is £110.8 million in 2018, as shown in Table 5, Appendix 4.

## Otterpool Park

3.22 Core Strategy Review Policy SS6 (Regulation 18 draft) indicates that 5,500 new homes will be provided within the New Garden Settlement at Otterpool Park. Otterpool Park will be in Zone 2 (Hythe) but will effectively form a new residential zone, with different shopping and leisure patterns when compared with Zone 2 or other zones in the study area.

3.23 Core Strategy Review Policy SS7 (Regulation 18 draft) indicates that a new town centre will be provided to serve the New Garden Settlement at Otterpool Park, although the scale of development within this centre is not specified.

3.24 The emerging Otterpool Park Masterplan suggests that 16,175 sq.m gross of Class A1 floorspace will be provided, but no breakdown between convenience good, comparison goods and A1 services has been provided. The phasing plan suggests 11,950 sq.m of Class A1 floorspace will be provided by 2037 (the end of the Core Strategy period).

3.25 The emerging masterplan also suggests 10,075 sq.m gross of Class A2 and A3 floorspace will be provided, of which 8,450 sq.m will be completed by 2037. No breakdown between Class A2 and A3 (food/beverage) has been provided.

3.26 Based on the scale of retail, food/beverage development envisaged, Otterpool Park is expected to retain a reasonably high level of expenditure generated by residents within the new settlement, particularly for convenience (food and grocery) goods. The following market shares/retention rates within the new settlement have been adopted:

- convenience goods = 75%
- comparison goods = 50%
- food and beverage = 70%

3.27 A reasonable proportion of the expenditure generated by new residents at Otterpool Park is also expected to be attracted to existing centres within the District i.e. Folkestone and Hythe, recognising there will be cross-flows of expenditure.

## Capacity for convenience goods floorspace

3.28 The future levels of available convenience goods expenditure in 2022, 2027, 2032 and 2037 are shown at Tables 6A to 9B in Appendix 2. The baseline total level of convenience goods expenditure available for shops in the District between 2018 and 2037 is summarised in Table 11A (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £254.48 million in 2018 to £290.53 million in 2037.

3.29 Table 11A subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is a small deficit of -£1.96 million convenience goods expenditure in 2018. By 2022, there is surplus of available expenditure of £3.45 million, increasing to £13.38 million by 2027. Continued expenditure growth increases the expenditure surplus to £23.67 million by 2032 and £34.08 million by 2037.

3.30 The deficit/surplus expenditure projections have been converted into floorspace estimates in Table 12A. Expenditure is converted into floorspace estimates using an assumed average sales density figure of £12,000 per sq.m, based on the average turnover of the main food supermarket operators. The floorspace requirements are summarised in Table 3.1 below.

Table 3.1 Baseline convenience floorspace projections (sq.m gross)

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Zone 1 - Folkestone/Cheriton | -2,225 | -2,085 | -1,936 | -1,831 |
| Zone 2 - Hythe | 770 | 983 | 1,182 | 1,373 |
| Zone 3 - New Romney | 1,338 | 1,398 | 1,398 | 1,384 |
| Other in District (Zone 4/6) | 340 | 376 | 404 | 426 |
| Otterpool Park | 138 | 921 | 1,769 | 2,705 |
| **District Total** | **410** | **1,593** | **2,817** | **4,057** |

Source: Table 12A, Appendix 2

3.31 The retail capacity assessment in the 2015 Study suggested there was no capacity for additional convenience floorspace within the District to 2031, primarily due to the lower population growth projections. However, the 2015 Study only provided a global floorspace capacity figure for the District as a whole, and did not provide a breakdown of retail capacity for Folkestone, Hythe and other parts of the District.

## Capacity for comparison goods floorspace

3.32 The retail capacity projections in this report assume centres within Folkestone & Hythe District can maintain their market share of comparison expenditure in the future. Available comparison goods expenditure has been projected forward to 2022, 2027, 2032 and 2037, as shown in Tables 6A to 8B in Appendix 3, and summarised in Table 9A. Available comparison expenditure to facilities within the District is expected to increase from £266.52 million in 2018 to £552.18 million in 2037.

3.33 Table 9A assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, as recommended by Experian. This growth will help to maintain the health and viability of town centres.

3.34 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 10A in Appendix 3, adopting average sales densities in 2018 of £6,000 per sq.m, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2037 could support 18,586 sq.m net of comparison sales floorspace (24,781 sq.m gross). The broken down floorspace projections are summarised in Table 3.2 below.

Table 3.2 Comparison Floorspace Projections (sq.m gross)

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Zone 1 - Folkestone/Cheriton | 3,703 | 7,397 | 11,565 | 15,768 |
| Zone 2 - Hythe | 371 | 942 | 1,584 | 2,273 |
| Zone 3 - New Romney | 123 | 210 | 300 | 378 |
| Other in District (Zone 4/6) | 18 | 33 | 48 | 63 |
| Otterpool Park | 281 | 1,961 | 3,943 | 6,299 |
| **District Total** | **4,496** | **10,543** | **17,440** | **24,781** |

Source: Table 11A, Appendix 3

3.35 The retail capacity assessment in the 2015 Study suggested 18,287 sq.m gross of comparison floorspace would be required within the District by 2031 (12,800 sq.m net).

## Capacity for food and beverage floorspace

3.36 The floorspace capacity projections in this report assume centres within Folkestone & Hythe District can maintain their market share of food and beverage expenditure in the future. Available food and beverage expenditure has been projected forward to 2022, 2027, 2032 and 2037, as shown in Tables 6A to 9B in Appendix 4, and summarised in Table 10A. Available food and beverage expenditure to facilities within the District is expected to increase from £110.8 million in 2018 to £133.86 million in 2037.

3.37 Table 10A assumes that the turnover of food and beverage floorspace will increase in real terms in the future. Experian does not provide forecasts for growth in turnover efficiencies for food and beverage floorspace. However, it seems likely that existing food and beverage floorspace can absorb some future growth, and a sales density growth rate of 1% per annum is adopted. Surplus food and beverage expenditure has been converted into food and beverage floorspace projections at Table 11A in Appendix 4, adopting average sales densities in 2018 of £5,000 per sq.m, which is projected to grow by 1% in the future due to improved turnover efficiency. The surplus expenditure at 2037 could support 4,155 sq.m gross food and beverage floorspace. The floorspace projections are summarised in Table 3.3 below.

Table 3.3 Food and Beverage Floorspace Projections (sq.m gross)

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Zone 1 - Folkestone/Cheriton | 276 | 518 | 774 | 1,008 |
| Zone 2 - Hythe | 123 | 272 | 413 | 536 |
| Zone 3 - New Romney | 45 | 70 | 86 | 90 |
| Other in District (Zone 4/6) | 100 | 214 | 315 | 402 |
| Otterpool Park | 105 | 709 | 1,375 | 2,119 |
| **District Total** | **648** | **1,784** | **2,963** | **4,155** |

Source: Table 11A, Appendix 4

3.38 The retail capacity assessment in the 2015 Study suggested 4,274 sq.m gross of food and beverage floorspace would be required within the District by 2031. This is a higher figure than suggested in this update, due to higher expenditure growth projections at that time.

## Capacity at Otterpool Park

3.39 As outlined above, the proposed new Garden City at Otterpool Park will generate demand for the following Class A1 retail and food/beverage (A3 to A5 floorspace). The baseline and high growth projections, are shown in Tables 3.4 and 3.5 below.

Table 3.4 Otterpool Park Floorspace Projections (sq.m gross) - Baseline

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Class A1 convenience | 138 | 921 | 1,769 | 2,705 |
| Class A1 comparison | 281 | 1,961 | 3,943 | 6,299 |
| Class A3 to A5 food/beverage | 105 | 709 | 1,375 | 2,119 |
| **Total** | **524** | **3,591** | **7,087** | **11,123** |

Source: Appendix 2, Table 12A; Appendix 3, Table 11A; and Appendix 4, Table 11A

Table 3.5 Otterpool Park Floorspace Projections (sq.m gross) – High growth

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Class A1 convenience | 160 | 1,067 | 2,050 | 3,136 |
| Class A1 comparison | 326 | 2,274 | 4,571 | 7,301 |
| Class A3 to A5 food/beverage | 122 | 822 | 1,594 | 2,456 |
| **Total** | **608** | **4,163** | **8,215** | **12,893** |

Source: Appendix 2, Table 12A; Appendix 3, Table 11A; and Appendix 4, Table 11A

3.40 These projections suggest the new town and local centres within the new Otterpool Park settlement should provide between 11,100 to 12,900 sq.m gross of retail and food/beverage floorspace by 2037.

3.41 These floorspace projections exclude Class A1 non-retail services and Class A2 financial/ professional services. Based on the typical mix of uses within centres, it is reasonable to assume an additional 20% floorspace to accommodate these service uses, which would increase the Otterpool Park overall floorspace projection to 13,300 to 15,500 sq.m gross (Class A1 to A5) by 2037.

3.42 As indicated earlier, the emerging Otterpool Park Masterplan phasing suggests 11,950 sq.m of Class A1 floorspace will be provided by 2037, and 8,450 sq.m Class A2 and A3 (food/beverage). The total Class A1 to A5 floorspace delivered by 2037 is 20,400 sq.m gross.

# 4.0 Other town centre uses assessment

## Introduction

4.1 This section assesses the potential for commercial leisure and town centre uses in Folkestone & Hythe District, including theatres, cinemas, ten pin bowling, bingo, health and fitness, trampoline centres, art galleries, museums and ice rinks.

## Commercial leisure uses

4.2 Residents in Folkestone & Hythe District have limited access to the full range of commercial leisure and entertainment facilities within the District – residents need to travel outside of the District to visit many commercial leisure uses. Destinations outside of the District include the nearby towns of Ashford, Dover and Canterbury.

4.3 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from clustering together within leisure parks.

### Cinemas

4.4 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. In 2017, the figure rose slightly to 170.6 million (Source: British Film Institute). Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The BFI indicates the 2017 national average was 2.6 trips per person per annum.

4.5 The Cinema Advertising Association identities 771 cinema facilities with 4,115 screens. 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 210 trips per seat per annum. Silver Screen in Folkestone, providing 2 screens and 545 seats, is the only full-time cinema in Folkestone & Hythe District.

4.6 The study area population in 2018 (130,933 people) will generate around 340,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). Adopting the national average population per cinema screen (40,000 trips per screen), implies that 340,000 trips generates demand for 8-9 cinema screens. In terms of seats, the national average (210 trips per seat) suggests 340,000 trips could support around 1,619 seats. The study area population at 2037 (148,700 to 150,538) would generate demand for 9-10 cinema screens or 1,841-1,864 seats.

4.7 Existing cinema provision in the District has 2 screens and 545 seats, which is much lower than the overall demand within the study area. The household survey results suggest most residents within the study area go to the cinema in Ashford. Cinema provision in Ashford will improve in the future. A new 6-screen Picturehouse cinema and 8 Class A3 restaurants are under-construction at Elwick Place in the town centre. The existing cinema at Eureka Leisure Park has planning permission for a new IMAX Screen and two new auditoria.

4.8 In theory, if the District could retain around 60% of the study area cinema trips, in line with the retention of comparison goods expenditure, then there may be scope for a 3 to 5 screen cinema in the District. However, the presence of large existing and proposed multiplex cinemas in Ashford and Dover (Cineworld) may limit operator demand for an additional facility.

## Theatres

4.9 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UK Theatres membership).

4.10 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the study area population in 2018 (130,933 people) generates about 65,000 theatre trips per annum and the study area population in 2037 (baseline and high growth assumptions) generates up to 75,000 trips per annum. Most trips to the theatre will continue to be attracted to productions within larger towns and cities outside of the study area.

4.11 The catchment areas of the towns in Folkestone & Hythe District are unlikely to support a full-time theatre facility. There is no clear need for additional theatre provision in Folkestone & Hythe District to 2037.

## Health and fitness clubs

4.12 The 2017 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 9.7 million fitness members in the UK, and the penetration is now 14.9%. The sector has more clubs, more members and a greater market value than ever before. The 2017 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2017, with an increase of 5.1% in the number of memberships and 4.6% growth in the number of facilities.

4.13 The Sport England/Active Places data indicates that there are 15 registered health and fitness suites in the District, with 687 fitness stations. Three of these facilities is for private use only. The private use facility provides 89 fitness stations in total. The remaining 12 registered facilities are open to the general public (including registered members) and have 598 fitness stations in total, as shown in Table 4.1 below.

Table 4.1 Folkestone & Hythe Health and Fitness Suites

| Name | Type | No. Fitness Stations |
|---|---|---|
| Al's Gym, New Romney | Registered Membership use | 100 |
| Bannatyne Health Club, Folkestone | Registered Membership use | 61 |
| Brockhill Park Performing Arts College, Hythe | Private Use | 19 |
| Dynamix Leisure, Folkestone | Registered Membership use | 50 |
| Fitone, Folkestone | Pay and Play | 60 |
| Folkestone Sports Centre, Folkestone | Pay and Play | 65 |
| Hi Rep Gym, Folkestone | Registered Membership use | 66 |
| Hythe Imperial Health Club & Spa, Hythe | Registered Membership use | 26 |
| Hythe Swimming Pool, Hythe | Pay and Play | 9 |
| Sir John Moore Barracks, Folkestone | Private Use | 50 |
| Spindles Health & Leisure, Folkestone | Registered Membership use | 16 |
| The Folkestone School for Girls, Folkestone | Private Use | 20 |
| The Marsh Academy Leisure Centre, New Romney | Registered Membership use | 35 |
| Three Hills Sports Park, Folkestone | Pay and Play | 10 |
| Trugym, Folkestone | Registered Membership use | 100 |
| **Total** | | **687** |

Source: Active Places, 2018

4.14 The current population is 130,933 (2018). The household survey results suggest the District attracts 76% of health and fitness participants within the study area. The retained population is around 99,500. This population estimate indicates that Folkestone & Hythe District has 6.9 fitness stations per 1,000 people (687 stations in total).

4.15 The South East of England region has 1,162 registered health and fitness suites with 57,559 fitness stations (average of 49.5 stations per suite). This existing provision equates to around 6.1 fitness stations per 1,000 people. Folkestone & Hythe District has a slightly higher provision of fitness stations (6.9 per 1,000 people) than the regional average (6.1 stations).

4.16 The implied catchment population (up around 114,000 in 2037 based on the high growth scenario) could support 786 fitness stations, based on the local average (6.9 stations per 1,000). These figures suggest there could be scope for 2 to 3 medium sized (30 to 50 stations) additional health and fitness facilities in the District by 2037.

## Tenpin bowling

4.17 There are no tenpin bowling centres in Folkestone & Hythe District. The study area population in 2018 (130,933 people) can in theory support around 11 ten pin bowling lanes, based on the national average of one lane per 12,000 people. By 2037, the study area population (baseline and higher growth assumption) could support 12-13 lanes.

4.18 The dispersed population within the study area and the existing provision of facilities in nearby towns (i.e. Hollywood Bowl in Ashford) will restrict the potential for a tenpin bowling facility within Folkestone & Hythe. However, the most logical area for a facility to be located is in Folkestone, as the main centre in the District.

## Bingo, games of chance and gambling

4.19 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL). There are no Bingo halls in Folkestone & Hythe, following the closure of Seven Bingo in Folkestone.

4.20 The adult (over 18) population in the study area at 2018 (around 105,000 people[1]) would generate about 147,000 bingo admissions, based on the national participation rate (1.4 trips per adult per annum). Based on national average figures (113,000 admissions per club), the study area can support one large bingo facility. Whilst there is theoretical capacity for a large bingo facility, the dispersed population in the study area and existing provision of facilities in nearby towns (i.e. Gala Bingo in Dover) will restrict the potential in the District.

## Trampoline centres

4.21 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a

[1] Based on the proportion of adult population (18+) being 80% - Source: Experian 2016 (average of the 18+ population for each zone)

variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce on 31 May 2014.

4.22 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.

4.23 There are no indoor trampoline centres in the District. The closest destination to the study area is Flip Out in Ashford. The wider area is not well served by trampoline centres, however given the proximity of the study area to Ashford, there is no obvious need for a facility in the District. However, the strategy should be flexible to respond to any emerging opportunities.

## Conclusions

4.24 A summary of the key findings in this Section is set out below:

- There is theoretical capacity for a further small/medium cinema (3 to 5 screens) within the District. However, the presence of existing and proposed large multiplex cinemas in Ashford and Dover (Cineworld) may limit operator demand.
- There is no clear need for additional theatre provision in Folkestone & Hythe District by 2037.
- There is scope for 2-3 medium sized additional health and fitness facilities in the District by 2037.
- There is theoretical capacity for a tenpin bowling and a bingo facility, but the dispersed population in the study area and existing provision of facilities in nearby towns will restrict the potential in the District.
- The wider area is not well served by trampoline centres, with only Flip Out in Ashford. Given the proximity of the study area to Ashford, there is no obvious need for a trampoline facility in the District.

# 5.0 Conclusions and implications

5.1 This report provides an update of the Shepway Town Centres Study 2015 (prepared by Peter Brett Associates), incorporating emerging Garden Settlement development proposals at Otterpool Park. It should be read alongside the previous 2015 Study.

5.2 The updated floorspace projections assume that new shopping and leisure facilities will help Folkestone & Hythe District maintain its current market share of expenditure within the study area, recognising that other competing centres will also improve in the future. The projections also assume the new Garden Settlement at Otterpool Park will include a town centre and local shopping facilities that are required to meet the needs of new residents.

## Floorspace capacity projections

5.3 Allowing for the impact of growth in home shopping, the quantitative assessment of the potential for new retail and food/beverage floorspace suggests there is a residual need for new development within Folkestone & Hythe District. The revised retail capacity projections suggest there is scope for up to around 33,000 sq.m gross Class A1 retail and food/beverage floorspace in Folkestone & Hythe District by 2037. The projections suggest at least one third of this floorspace requirement could be accommodated at the new Garden Settlement at Otterpool Park.

5.4 The baseline global floorspace projections for the District, up to 2037 are summarised in Table 5.1 below.

Table 5.1 Floorspace Projections Summary (sq.m gross)

| | By 2022 | By 2027 | By 2032 | By 2037 |
|---|---|---|---|---|
| Class A1 - convenience | 410 | 1,593 | 2,817 | 4,057 |
| Class A1 - comparison | 4,496 | 10,543 | 17,440 | 24,781 |
| Class A3 to A5 – food/beverage | 648 | 1,784 | 2,963 | 4,155 |
| **District Total** | **5,554** | **13,920** | **23,220** | **32,993** |

Source: Appendix 2, Table 12A; Appendix 3, Table 11A; Appendix 4, Table 11A

5.5 In addition to retail and food and beverage uses there may be scope for other main town centre uses by 2037, as follows:

- a small/medium cinema (3 to 5 screens) within the District (subject to operator demand); and
- 2-3 medium sized additional health and fitness facilities.

## Strategic implications

5.6 The existing stock of premises will have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities and vacant shops could help to accommodate future growth. However, as noted by the previous 2015 Study, there is limited scope for this level of floorspace to be accommodated within existing stock.

5.7 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.

5.8 As previously indicated in the 2015 Study, the sites with the greatest potential for redevelopment are the Folkestone Bus Station site and the existing retail units on Guildhall Street/Gloucester Place/Shellons Street. Long term scope also exists for the redevelopment of the Sainsbury's store and adjacent areas at Bouverie Place West.

5.9 The Bus Station site provides the opportunity for a retail/leisure led development and could include new retail units, restaurants/bars and a cinema (subject to market demand). This could help enhance the leisure offer in the District as residents currently look to other towns outside the District to meet their leisure needs.

5.10 Guildhall Street/Gloucester Place/Shellons Street could be redeveloped to provide larger footprint, modern shop units. This will allow larger, national retailers to occupy space in the town centre through the provision of better quality, larger shop units.

5.11 Other floorspace requirements could be accommodated through commitments or planning permissions approved since 2015. For example, the redevelopment of land at Shorncliffe Garrison/The Stadium in Folkestone includes the provision of retail and café/restaurant floorspace.

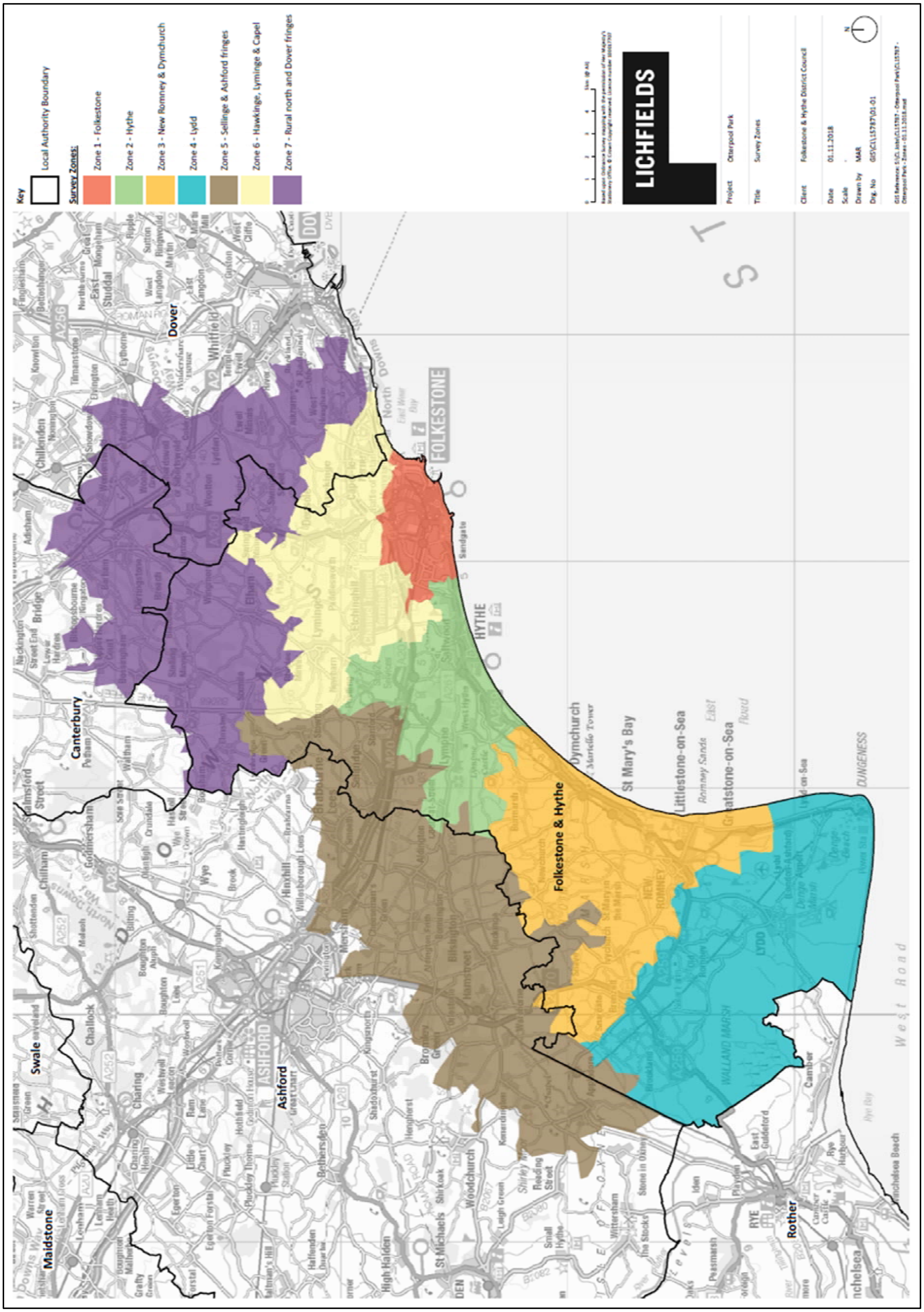
5.12 As previously indicated in the 2015 Study, for the other smaller centres in the District, a significant additional amount of new retail or commercial leisure would not be expected to come forward – this is more likely to be small in-fill development, shop extensions and expansion into upper floors. Notwithstanding this, the development plan should be flexible enough to allow applications for new development which will enhance the vitality and viability of the centre to come forwards (provided they are sequentially preferable and meet the impact test, if required).

### Otterpool Park

5.13 The projections suggest the new town and local centres within Otterpool Park new settlement should support between 11,100 to 12,900 sq.m gross of retail and food/beverage floorspace by 2037, excluding Class A1 non-retail services and Class A2 financial/ professional services. Service uses could increase Otterpool Park's overall floorspace projection to 13,300 to 15,500 sq.m gross (Class A1 to A5) by 2037.

5.14 The emerging Otterpool Park Masterplan phasing suggests total Class A1 to A5 floorspace of 20,400 sq.m gross, delivered by 2037. The Masterplan phasing plan is more than sufficient to meet the need generated by the new Garden Settlement, and could also accommodate residual growth from other parts of the District, if required.

# Appendix 1: Study area and methodology


Key
Local Authority Boundary
Survey Zones:
Zone 1 - Folkestone
Zone 2 - Hythe
Zone 3 - New Romney & Dymchurch
Zone 4 - Lydd
Zone 5 - Sellinge & Ashford fringes
Zone 6 - Hawkinge, Lyminge & Capel
Zone 7 - Rural north and Dover fringes
LICHFIELDS
Project Otterpool Park
Title Survey Zones
Client Folkestone & Hythe District Council
Date 01.11.2018
Drawn by MAR
Folkestone & Hythe
Canterbury
Dover
Ashford
Swale
Maidstone
Rother
FOLKESTONE
HYTHE
Dymchurch
St Mary's Bay
Littlestone-on-Sea
DUNGENESS

## Retail Capacity Assessment – Methodology and Data

### Price Base

All monetary values expressed in this study are at 2016 prices, consistent with Experian's base year expenditure figures for 2016 (Retail Planner Briefing Note 15, December 2017) which is the most up to date information available.

### Retail Expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2016 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes several macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2016 to 2019 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 0% for 2016 to 2017, -0.6% for 2017 to 2018 and -0.2% to 2019; for comparison goods: +2.3% for 2016-2017, +0.9% for 2017-2018 and +2.1% for 2017; for food and beverage: +0.3% for 2016-2017, -0.1% for 2017-2018 and +0.8% for 2017.

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer-term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2019; 3.2% per annum growth for comparison goods after 2019; and food and beverage 1.1% after 2019. These growth rates are relatively cautious when compared with past growth rates, but in our view, represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2016 was:

- 9.6% of convenience goods expenditure; and
- 18.0% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2016 were:

- 2.9% of convenience goods expenditure; and
- 13.5% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.1% and 17.8% by 2031 respectively. These figures have been adopted in this assessment.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after 2022.

The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

**Market Shares/Penetration Rates**

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates is based on a range of factors but primarily information gathered through the May 2014 household survey.

The total turnover of shops and food/beverage outlets within Folkestone & Hythe is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

**Benchmark Turnover Levels**

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

Changes in convenience goods sales areas between 2015 and 2018 have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database and Valuation Office data. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Folkestone &

Hythe and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £6,000 per sq.m net for convenience shops/stores in the study area has been adopted.

Global Data provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges from £5,000 to £8,000 per sq.m net.

# Appendix 2: Convenience goods capacity

**Table 1A - Study area population - baseline growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 588 | 3,940 | 7,564 | 11,550 |
| **Total** | **130,933** | **134,638** | **139,557** | **144,224** | **148,700** |

*Sources:*

*Experian MMG 3 Population Projections 2016*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 280 dwellings (588 people)*
*2027 = 1,876 dwellings (3,940 people)*
*2032 = 3,602 dwellings (7,564 people)*
*2037 = 5,500 dwellings (11,550 people)*

**Table 1B - Study area population - high growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 683 | 4,568 | 8,768 | 13,388 |
| **Total** | **130,933** | **134,733** | **140,185** | **145,428** | **150,538** |

*Sources:*

*Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 325 dwellings (683 people)*
*2027 = 2,175 dwellings (4,568 people)*
*2032 = 4,175 dwellings (8,768 people)*
*2037 = 6,375 dwellings (13,388 people)*
*Otterpool Park Masterplan 875 additional dwellings at 2037 over and above Core Strategy (5,500 dwgs)*

**Table 2 - Convenience Goods Expenditure per person per annum (£)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 2,039 | 2,026 | 2,023 | 2,025 | 2,028 |
| Zone 2 - Hythe | 2,356 | 2,342 | 2,339 | 2,340 | 2,345 |
| Zone 3 - New Romney & Dymchurch | 2,402 | 2,387 | 2,384 | 2,386 | 2,391 |
| Zone 4 - Lydd | 2,287 | 2,273 | 2,270 | 2,272 | 2,276 |
| Zone 5 - Sellinge & Ashford fringes | 2,540 | 2,524 | 2,521 | 2,523 | 2,527 |
| Zone 6 - Hawkinge, Lyminge & Capel | 2,336 | 2,322 | 2,319 | 2,320 | 2,325 |
| Zone 7 - Rural north and Dover fringes | 2,648 | 2,632 | 2,628 | 2,630 | 2,635 |
| Otterpool Park | 2,373 | 2,358 | 2,355 | 2,357 | 2,361 |

*Sources:*
*Experian Local Expenditure 2016 (2016 prices)*
*Growth Rates: -0.6% in 2018, -0.2% in 2019 and 0.1% beyond 2019.*
*Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses*

**Table 3A - Total convenience goods expenditure (£m) - baseline growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 107.34 | 108.74 | 108.85 | 109.20 | 109.38 |
| Zone 2 - Hythe | 43.23 | 43.63 | 43.52 | 43.24 | 42.76 |
| Zone 3 - New Romney & Dymchurch | 40.09 | 40.75 | 40.81 | 40.71 | 40.40 |
| Zone 4 - Lydd | 14.57 | 14.94 | 15.12 | 15.24 | 15.30 |
| Zone 5 - Sellinge & Ashford fringes | 31.64 | 32.79 | 34.56 | 36.02 | 37.40 |
| Zone 6 - Hawkinge, Lyminge & Capel | 34.93 | 35.68 | 36.17 | 36.49 | 36.61 |
| Zone 7 - Rural north and Dover fringes | 25.07 | 25.66 | 26.58 | 27.56 | 28.50 |
| Otterpool Park | 0.00 | 1.39 | 9.28 | 17.83 | 27.27 |
| **Study Area Total** | **296.88** | **303.57** | **314.90** | **326.29** | **337.62** |

*Source: Tables 1A and 2*

**Table 3B - Total convenience goods expenditure (£m) - high growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 107.34 | 108.74 | 108.85 | 109.20 | 109.38 |
| Zone 2 - Hythe | 43.23 | 43.63 | 43.52 | 43.24 | 42.76 |
| Zone 3 - New Romney & Dymchurch | 40.09 | 40.75 | 40.81 | 40.71 | 40.40 |
| Zone 4 - Lydd | 14.57 | 14.94 | 15.12 | 15.24 | 15.30 |
| Zone 5 - Sellinge & Ashford fringes | 31.64 | 32.79 | 34.56 | 36.02 | 37.40 |
| Zone 6 - Hawkinge, Lyminge & Capel | 34.93 | 35.68 | 36.17 | 36.49 | 36.61 |
| Zone 7 - Rural north and Dover fringes | 25.07 | 25.66 | 26.58 | 27.56 | 28.50 |
| Otterpool Park | 0.00 | 1.61 | 10.76 | 20.67 | 31.61 |
| **Study Area Total** | **296.88** | **303.79** | **316.38** | **329.13** | **341.96** |

*Source: Tables 1B and 2*

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

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park* | Inflow |
|---|---|---|---|---|---|---|---|---|---|
| Zone 1 - Folkestone/Cheriton | 90.2% | 17.1% | 15.1% | 2.7% | 6.0% | 68.0% | 13.9% | 5.0% | 10.0% |
| Zone 2 - Hythe | 4.1% | 78.8% | 26.6% | 3.7% | 9.9% | 4.7% | 4.7% | 18.0% | 10.0% |
| Zone 3 - New Romney | 0.1% | 0.4% | 39.9% | 28.3% | 0.3% | 0.2% | 0.0% | 0.0% | 10.0% |
| Other in District (Zone 4/6) | 2.1% | 0.5% | 0.8% | 2.9% | 8.2% | 18.8% | 2.7% | 0.0% | 10.0% |
| Otterpool Park - Proposed facilities | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 75.0% | 10.0% |
| **District Total** | **96.5%** | **96.8%** | **82.4%** | **37.6%** | **24.4%** | **91.7%** | **21.3%** | **98.0%** | |
| Rest of study area (outside District) | 0.0% | 0.1% | 0.0% | 0.0% | 3.2% | 0.1% | 3.2% | 0.0% | n/a |
| Ashford | 1.3% | 2.1% | 16.6% | 23.6% | 68.9% | 1.2% | 18.6% | 2.0% | n/a |
| Canterbury | 0.3% | 0.1% | 0.0% | 0.1% | 0.7% | 0.9% | 23.3% | 0.0% | n/a |
| Dover | 1.3% | 0.1% | 0.7% | 0.3% | 0.8% | 4.3% | 24.8% | 0.0% | n/a |
| Rye | 0.0% | 0.0% | 0.2% | 19.5% | 0.6% | 0.0% | 0.0% | 0.0% | n/a |
| Tenterden | 0.0% | 0.7% | 0.0% | 3.9% | 1.0% | 0.4% | 0.5% | 0.0% | n/a |
| Other | 0.6% | 0.1% | 0.1% | 15.0% | 0.4% | 1.4% | 8.3% | 0.0% | n/a |
| **Outside Study Area Total** | **3.5%** | **3.2%** | **17.6%** | **62.4%** | **75.6%** | **8.3%** | **78.7%** | **2.0%** | |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: PBA Shepway Town Centres Study 2014 / NEMS Household Survey May 2014 * predicted Otterpool Park shares*

**Table 5 - Base year 2018 convenience goods expenditure patterns by zone (£M)**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2018** | **107.34** | **43.23** | **40.09** | **14.57** | **31.64** | **34.93** | **25.07** | **0.00** | | **296.88** |
| Zone 1 - Folkestone/Cheriton | 96.82 | 7.39 | 6.05 | 0.39 | 1.90 | 23.76 | 3.49 | 0.00 | 15.53 | 155.33 |
| Zone 2 - Hythe | 4.40 | 34.07 | 10.66 | 0.54 | 3.13 | 1.64 | 1.18 | 0.00 | 6.18 | 61.80 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.00 | 4.12 | 0.09 | 0.07 | 0.00 | 0.00 | 2.28 | 22.85 |
| Other in District (Zone 4/6) | 2.25 | 0.22 | 0.32 | 0.42 | 2.59 | 6.57 | 0.68 | 0.00 | 1.45 | 14.50 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **District Total** | **103.58** | **41.85** | **33.03** | **5.48** | **7.72** | **32.04** | **5.34** | **0.00** | **25.45** | **254.48** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.01 | 0.03 | 0.80 | 0.00 | | 1.89 |
| Ashford | 1.40 | 0.91 | 6.65 | 3.44 | 21.80 | 0.42 | 4.66 | 0.00 | | 39.28 |
| Canterbury | 0.32 | 0.04 | 0.00 | 0.01 | 0.22 | 0.31 | 5.84 | 0.00 | | 6.76 |
| Dover | 1.40 | 0.04 | 0.28 | 0.04 | 0.25 | 1.50 | 6.22 | 0.00 | | 9.74 |
| Rye | 0.00 | 0.00 | 0.08 | 2.84 | 0.19 | 0.00 | 0.00 | 0.00 | | 3.11 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.57 | 0.32 | 0.14 | 0.13 | 0.00 | | 1.45 |
| Other | 0.64 | 0.04 | 0.04 | 2.19 | 0.13 | 0.49 | 2.08 | 0.00 | | 5.61 |
| **Outside Study Area Total** | **3.76** | **1.38** | **7.06** | **9.09** | **23.92** | **2.90** | **19.73** | **0.00** | | **67.84** |
| **TOTAL** | **107.34** | **43.23** | **40.09** | **14.57** | **31.64** | **34.93** | **25.07** | **0.00** | **25.45** | **322.33** |

*Source: Tables 3A and 4*

**Table 6A - Future 2022 convenience goods expenditure patterns by zone (£M) - baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **108.74** | **43.63** | **40.75** | **14.94** | **32.79** | **35.68** | **25.66** | **1.39** | | **303.57** |
| Zone 1 - Folkestone/Cheriton | 98.08 | 7.46 | 6.15 | 0.40 | 1.97 | 24.27 | 3.57 | 0.07 | 15.77 | 157.74 |
| Zone 2 - Hythe | 4.46 | 34.38 | 10.84 | 0.55 | 3.25 | 1.68 | 1.21 | 0.25 | 6.29 | 62.90 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.26 | 4.23 | 0.10 | 0.07 | 0.00 | 0.00 | 2.33 | 23.27 |
| Other in District (Zone 4/6) | 2.28 | 0.22 | 0.33 | 0.43 | 2.69 | 6.71 | 0.69 | 0.00 | 1.48 | 14.83 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.04 | 0.12 | 1.16 |
| **District Total** | **104.93** | **42.23** | **33.58** | **5.62** | **8.00** | **32.72** | **5.46** | **1.36** | **25.99** | **259.89** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.05 | 0.04 | 0.82 | 0.00 | | 1.95 |
| Ashford | 1.41 | 0.92 | 6.76 | 3.53 | 22.59 | 0.43 | 4.77 | 0.03 | | 40.44 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.01 | 0.23 | 0.32 | 5.98 | 0.00 | | 6.91 |
| Dover | 1.41 | 0.04 | 0.29 | 0.04 | 0.26 | 1.53 | 6.36 | 0.00 | | 9.95 |
| Rye | 0.00 | 0.00 | 0.08 | 2.91 | 0.20 | 0.00 | 0.00 | 0.00 | | 3.19 |
| Tenterden | 0.00 | 0.31 | 0.00 | 0.58 | 0.33 | 0.14 | 0.13 | 0.00 | | 1.49 |
| Other | 0.65 | 0.04 | 0.04 | 2.24 | 0.13 | 0.50 | 2.13 | 0.00 | | 5.74 |
| **Outside Study Area Total** | **3.81** | **1.40** | **7.17** | **9.32** | **24.79** | **2.96** | **20.19** | **0.03** | | **69.67** |
| **TOTAL** | **108.74** | **43.63** | **40.75** | **14.94** | **32.79** | **35.68** | **25.66** | **1.39** | **25.99** | **329.56** |

*Source: Tables 3A and 4*

**Table 6B - Future 2022 convenience goods expenditure patterns by zone (£M) - high growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **108.74** | **43.63** | **40.75** | **14.94** | **32.79** | **35.68** | **25.66** | **1.61** | | **303.79** |
| Zone 1 - Folkestone/Cheriton | 98.08 | 7.46 | 6.15 | 0.40 | 1.97 | 24.27 | 3.57 | 0.08 | 15.78 | 157.75 |
| Zone 2 - Hythe | 4.46 | 34.38 | 10.84 | 0.55 | 3.25 | 1.68 | 1.21 | 0.29 | 6.29 | 62.94 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.26 | 4.23 | 0.10 | 0.07 | 0.00 | 0.00 | 2.33 | 23.27 |
| Other in District (Zone 4/6) | 2.28 | 0.22 | 0.33 | 0.43 | 2.69 | 6.71 | 0.69 | 0.00 | 1.48 | 14.83 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.21 | 0.13 | 1.34 |
| **District Total** | **104.93** | **42.23** | **33.58** | **5.62** | **8.00** | **32.72** | **5.46** | **1.58** | **26.01** | **260.14** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.05 | 0.04 | 0.82 | 0.00 | | 1.95 |
| Ashford | 1.41 | 0.92 | 6.76 | 3.53 | 22.59 | 0.43 | 4.77 | 0.03 | | 40.44 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.01 | 0.23 | 0.32 | 5.98 | 0.00 | | 6.91 |
| Dover | 1.41 | 0.04 | 0.29 | 0.04 | 0.26 | 1.53 | 6.36 | 0.00 | | 9.95 |
| Rye | 0.00 | 0.00 | 0.08 | 2.91 | 0.20 | 0.00 | 0.00 | 0.00 | | 3.19 |
| Tenterden | 0.00 | 0.31 | 0.00 | 0.58 | 0.33 | 0.14 | 0.13 | 0.00 | | 1.49 |
| Other | 0.65 | 0.04 | 0.04 | 2.24 | 0.13 | 0.50 | 2.13 | 0.00 | | 5.74 |
| **Outside Study Area Total** | **3.81** | **1.40** | **7.17** | **9.32** | **24.79** | **2.96** | **20.19** | **0.03** | | **69.67** |
| **TOTAL** | **108.74** | **43.63** | **40.75** | **14.94** | **32.79** | **35.68** | **25.66** | **1.61** | **26.01** | **329.81** |

*Source: Tables 3A and 4*

**Table 7A - Future 2027 convenience goods expenditure patterns by zone (£M) - baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **108.85** | **43.52** | **40.81** | **15.12** | **34.56** | **36.17** | **26.58** | **9.28** | | **314.90** |
| Zone 1 - Folkestone/Cheriton | 98.19 | 7.44 | 6.16 | 0.41 | 2.07 | 24.60 | 3.69 | 0.46 | 15.89 | 158.92 |
| Zone 2 - Hythe | 4.46 | 34.30 | 10.86 | 0.56 | 3.42 | 1.70 | 1.25 | 1.67 | 6.47 | 64.68 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.28 | 4.28 | 0.10 | 0.07 | 0.00 | 0.00 | 2.34 | 23.36 |
| Other in District (Zone 4/6) | 2.29 | 0.22 | 0.33 | 0.44 | 2.83 | 6.80 | 0.72 | 0.00 | 1.51 | 15.13 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 6.96 | 0.77 | 7.73 |
| **District Total** | **105.04** | **42.13** | **33.63** | **5.69** | **8.43** | **33.17** | **5.66** | **9.09** | **26.98** | **269.83** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.11 | 0.04 | 0.85 | 0.00 | | 2.04 |
| Ashford | 1.42 | 0.91 | 6.77 | 3.57 | 23.81 | 0.43 | 4.94 | 0.19 | | 42.05 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.24 | 0.33 | 6.19 | 0.00 | | 7.15 |
| Dover | 1.42 | 0.04 | 0.29 | 0.05 | 0.28 | 1.56 | 6.59 | 0.00 | | 10.21 |
| Rye | 0.00 | 0.00 | 0.08 | 2.95 | 0.21 | 0.00 | 0.00 | 0.00 | | 3.24 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.59 | 0.35 | 0.14 | 0.13 | 0.00 | | 1.52 |
| Other | 0.65 | 0.04 | 0.04 | 2.27 | 0.14 | 0.51 | 2.21 | 0.00 | | 5.86 |
| **Outside Study Area Total** | **3.81** | **1.39** | **7.18** | **9.44** | **26.13** | **3.00** | **20.92** | **0.19** | | **72.06** |
| **TOTAL** | **108.85** | **43.52** | **40.81** | **15.12** | **34.56** | **36.17** | **26.58** | **9.28** | **26.98** | **341.88** |

*Source: Tables 3A and 4*

**Table 7B - Future 2027 convenience goods expenditure patterns by zone (£M) - high growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **108.85** | **43.52** | **40.81** | **15.12** | **34.56** | **36.17** | **26.58** | **10.76** | | **316.38** |
| Zone 1 - Folkestone/Cheriton | 98.19 | 7.44 | 6.16 | 0.41 | 2.07 | 24.60 | 3.69 | 0.54 | 15.90 | 159.00 |
| Zone 2 - Hythe | 4.46 | 34.30 | 10.86 | 0.56 | 3.42 | 1.70 | 1.25 | 1.94 | 6.50 | 64.98 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.28 | 4.28 | 0.10 | 0.07 | 0.00 | 0.00 | 2.34 | 23.36 |
| Other in District (Zone 4/6) | 2.29 | 0.22 | 0.33 | 0.44 | 2.83 | 6.80 | 0.72 | 0.00 | 1.51 | 15.13 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.07 | 0.90 | 8.96 |
| **District Total** | **105.04** | **42.13** | **33.63** | **5.69** | **8.43** | **33.17** | **5.66** | **10.54** | **27.14** | **271.44** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.11 | 0.04 | 0.85 | 0.00 | | 2.04 |
| Ashford | 1.42 | 0.91 | 6.77 | 3.57 | 23.81 | 0.43 | 4.94 | 0.22 | | 42.08 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.24 | 0.33 | 6.19 | 0.00 | | 7.15 |
| Dover | 1.42 | 0.04 | 0.29 | 0.05 | 0.28 | 1.56 | 6.59 | 0.00 | | 10.21 |
| Rye | 0.00 | 0.00 | 0.08 | 2.95 | 0.21 | 0.00 | 0.00 | 0.00 | | 3.24 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.59 | 0.35 | 0.14 | 0.13 | 0.00 | | 1.52 |
| Other | 0.65 | 0.04 | 0.04 | 2.27 | 0.14 | 0.51 | 2.21 | 0.00 | | 5.86 |
| **Outside Study Area Total** | **3.81** | **1.39** | **7.18** | **9.44** | **26.13** | **3.00** | **20.92** | **0.22** | | **72.09** |
| **TOTAL** | **108.85** | **43.52** | **40.81** | **15.12** | **34.56** | **36.17** | **26.58** | **10.76** | **27.14** | **343.52** |

*Source: Tables 3A and 4*

**Table 8A - Future 2032 convenience goods expenditure patterns by zone (£M) - baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **109.20** | **43.24** | **40.71** | **15.24** | **36.02** | **36.49** | **27.56** | **17.83** | | **326.29** |
| Zone 1 - Folkestone/Cheriton | 98.50 | 7.39 | 6.15 | 0.41 | 2.16 | 24.81 | 3.83 | 0.89 | 16.02 | 160.17 |
| Zone 2 - Hythe | 4.48 | 34.07 | 10.83 | 0.56 | 3.57 | 1.71 | 1.30 | 3.21 | 6.64 | 66.36 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.24 | 4.31 | 0.11 | 0.07 | 0.00 | 0.00 | 2.34 | 23.36 |
| Other in District (Zone 4/6) | 2.29 | 0.22 | 0.33 | 0.44 | 2.95 | 6.86 | 0.74 | 0.00 | 1.54 | 15.37 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 13.37 | 1.49 | 14.86 |
| **District Total** | **105.38** | **41.85** | **33.54** | **5.73** | **8.79** | **33.46** | **5.87** | **17.47** | **28.01** | **280.11** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.15 | 0.04 | 0.88 | 0.00 | | 2.11 |
| Ashford | 1.42 | 0.91 | 6.76 | 3.60 | 24.82 | 0.44 | 5.13 | 0.36 | | 43.42 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.25 | 0.33 | 6.42 | 0.00 | | 7.39 |
| Dover | 1.42 | 0.04 | 0.28 | 0.05 | 0.29 | 1.57 | 6.84 | 0.00 | | 10.49 |
| Rye | 0.00 | 0.00 | 0.08 | 2.97 | 0.22 | 0.00 | 0.00 | 0.00 | | 3.27 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.59 | 0.36 | 0.15 | 0.14 | 0.00 | | 1.54 |
| Other | 0.66 | 0.04 | 0.04 | 2.29 | 0.14 | 0.51 | 2.29 | 0.00 | | 5.97 |
| **Outside Study Area Total** | **3.82** | **1.38** | **7.16** | **9.51** | **27.23** | **3.03** | **21.69** | **0.36** | | **74.19** |
| **TOTAL** | **109.20** | **43.24** | **40.71** | **15.24** | **36.02** | **36.49** | **27.56** | **17.83** | **28.01** | **354.30** |

*Source: Tables 3A and 4*

**Table 8B - Future 2032 convenience goods expenditure patterns by zone (£M) - high growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **109.20** | **43.24** | **40.71** | **15.24** | **36.02** | **36.49** | **27.56** | **20.67** | | **329.13** |
| Zone 1 - Folkestone/Cheriton | 98.50 | 7.39 | 6.15 | 0.41 | 2.16 | 24.81 | 3.83 | 1.03 | 16.03 | 160.32 |
| Zone 2 - Hythe | 4.48 | 34.07 | 10.83 | 0.56 | 3.57 | 1.71 | 1.30 | 3.72 | 6.69 | 66.93 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.24 | 4.31 | 0.11 | 0.07 | 0.00 | 0.00 | 2.34 | 23.36 |
| Other in District (Zone 4/6) | 2.29 | 0.22 | 0.33 | 0.44 | 2.95 | 6.86 | 0.74 | 0.00 | 1.54 | 15.37 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 15.50 | 1.72 | 17.22 |
| **District Total** | **105.38** | **41.85** | **33.54** | **5.73** | **8.79** | **33.46** | **5.87** | **20.25** | **28.32** | **283.20** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.15 | 0.04 | 0.88 | 0.00 | | 2.11 |
| Ashford | 1.42 | 0.91 | 6.76 | 3.60 | 24.82 | 0.44 | 5.13 | 0.41 | | 43.48 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.25 | 0.33 | 6.42 | 0.00 | | 7.39 |
| Dover | 1.42 | 0.04 | 0.28 | 0.05 | 0.29 | 1.57 | 6.84 | 0.00 | | 10.49 |
| Rye | 0.00 | 0.00 | 0.08 | 2.97 | 0.22 | 0.00 | 0.00 | 0.00 | | 3.27 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.59 | 0.36 | 0.15 | 0.14 | 0.00 | | 1.54 |
| Other | 0.66 | 0.04 | 0.04 | 2.29 | 0.14 | 0.51 | 2.29 | 0.00 | | 5.97 |
| **Outside Study Area Total** | **3.82** | **1.38** | **7.16** | **9.51** | **27.23** | **3.03** | **21.69** | **0.41** | | **74.25** |
| **TOTAL** | **109.20** | **43.24** | **40.71** | **15.24** | **36.02** | **36.49** | **27.56** | **20.67** | **28.32** | **357.45** |

*Source: Tables 3A and 4*

**Table 9A - Future 2037 convenience goods expenditure patterns by zone (£M) - baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **109.38** | **42.76** | **40.40** | **15.30** | **37.40** | **36.61** | **28.50** | **27.27** | | **337.62** |
| Zone 1 - Folkestone/Cheriton | 98.66 | 7.31 | 6.10 | 0.41 | 2.24 | 24.90 | 3.96 | 1.36 | 16.11 | 161.05 |
| Zone 2 - Hythe | 4.48 | 33.69 | 10.75 | 0.57 | 3.70 | 1.72 | 1.34 | 4.91 | 6.80 | 67.96 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.12 | 4.33 | 0.11 | 0.07 | 0.00 | 0.00 | 2.32 | 23.24 |
| Other in District (Zone 4/6) | 2.30 | 0.21 | 0.32 | 0.44 | 3.07 | 6.88 | 0.77 | 0.00 | 1.56 | 15.55 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20.45 | 2.27 | 22.72 |
| **District Total** | **105.55** | **41.39** | **33.29** | **5.75** | **9.12** | **33.57** | **6.07** | **26.72** | **29.05** | **290.53** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.20 | 0.04 | 0.91 | 0.00 | | 2.19 |
| Ashford | 1.42 | 0.90 | 6.71 | 3.61 | 25.77 | 0.44 | 5.30 | 0.55 | | 44.69 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.26 | 0.33 | 6.64 | 0.00 | | 7.62 |
| Dover | 1.42 | 0.04 | 0.28 | 0.05 | 0.30 | 1.57 | 7.07 | 0.00 | | 10.73 |
| Rye | 0.00 | 0.00 | 0.08 | 2.98 | 0.22 | 0.00 | 0.00 | 0.00 | | 3.29 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.60 | 0.37 | 0.15 | 0.14 | 0.00 | | 1.56 |
| Other | 0.66 | 0.04 | 0.04 | 2.30 | 0.15 | 0.51 | 2.37 | 0.00 | | 6.06 |
| **Outside Study Area Total** | **3.83** | **1.37** | **7.11** | **9.55** | **28.27** | **3.04** | **22.43** | **0.55** | | **76.14** |
| **TOTAL** | **109.38** | **42.76** | **40.40** | **15.30** | **37.40** | **36.61** | **28.50** | **27.27** | **29.05** | **366.67** |

*Source: Tables 3A and 4*

**Table 9B - Future 2037 convenience goods expenditure patterns by zone (£M) - high growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **109.38** | **42.76** | **40.40** | **15.30** | **37.40** | **36.61** | **28.50** | **31.61** | | **341.96** |
| Zone 1 - Folkestone/Cheriton | 98.66 | 7.31 | 6.10 | 0.41 | 2.24 | 24.90 | 3.96 | 1.58 | 16.13 | 161.30 |
| Zone 2 - Hythe | 4.48 | 33.69 | 10.75 | 0.57 | 3.70 | 1.72 | 1.34 | 5.69 | 6.88 | 68.83 |
| Zone 3 - New Romney | 0.11 | 0.17 | 16.12 | 4.33 | 0.11 | 0.07 | 0.00 | 0.00 | 2.32 | 23.24 |
| Other in District (Zone 4/6) | 2.30 | 0.21 | 0.32 | 0.44 | 3.07 | 6.88 | 0.77 | 0.00 | 1.56 | 15.55 |
| Otterpool Park - Proposed facilities | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 23.71 | 2.63 | 26.34 |
| **District Total** | **105.55** | **41.39** | **33.29** | **5.75** | **9.12** | **33.57** | **6.07** | **30.98** | **29.53** | **295.26** |
| Rest of study area (outside District) | 0.00 | 0.04 | 0.00 | 0.00 | 1.20 | 0.04 | 0.91 | 0.00 | | 2.19 |
| Ashford | 1.42 | 0.90 | 6.71 | 3.61 | 25.77 | 0.44 | 5.30 | 0.63 | | 44.78 |
| Canterbury | 0.33 | 0.04 | 0.00 | 0.02 | 0.26 | 0.33 | 6.64 | 0.00 | | 7.62 |
| Dover | 1.42 | 0.04 | 0.28 | 0.05 | 0.30 | 1.57 | 7.07 | 0.00 | | 10.73 |
| Rye | 0.00 | 0.00 | 0.08 | 2.98 | 0.22 | 0.00 | 0.00 | 0.00 | | 3.29 |
| Tenterden | 0.00 | 0.30 | 0.00 | 0.60 | 0.37 | 0.15 | 0.14 | 0.00 | | 1.56 |
| Other | 0.66 | 0.04 | 0.04 | 2.30 | 0.15 | 0.51 | 2.37 | 0.00 | | 6.06 |
| **Outside Study Area Total** | **3.83** | **1.37** | **7.11** | **9.55** | **28.27** | **3.04** | **22.43** | **0.63** | | **76.23** |
| **TOTAL** | **109.38** | **42.76** | **40.40** | **15.30** | **37.40** | **36.61** | **28.50** | **31.61** | **29.53** | **371.48** |

*Source: Tables 3A and 4*

**Table 10 - Convenience Goods Floorspace in Folkestone and Hythe Main Settlements (2016 prices)**

| Area/Store | Sales Floorspace (sq.m net) | Convenience Goods Floorspace (%) | Convenience Goods Floorspace (sq.m net) | Turnover (£ per sq.m) | Total Turnover (£m) |
|---|---|---|---|---|---|
| **Folkestone** | | | | | |
| Asda, Bouverie Place, Folkestone | 5,824 | 64% | 3,727 | £13,317 | £49.64 |
| Sainsbury's, Bouverie Road West, Folkestone | 2,409 | 70% | 1,686 | £11,068 | £18.66 |
| Lidl, Shellons Street, Folkestone | 809 | 80% | 647 | £8,661 | £5.61 |
| Sainsbury's, Park Farm Retail Park, Folkestone | 4,472 | 65% | 2,907 | £11,068 | £32.17 |
| Morrisons, Cheriton Road, Folkestone | 2,540 | 77% | 1,956 | £12,369 | £24.19 |
| Iceland, Sandgate Lane Shopping Centre, Folkestone | 418 | 90% | 376 | £6,451 | £2.43 |
| Tesco Express, Dover Road, Folkestone | 242 | 90% | 218 | £12,221 | £2.66 |
| Tesco Express, Foord Road, Folkestone | 238 | 90% | 214 | £12,221 | £2.62 |
| Tesco Express, Bouverie Road West, Folkestone | 240 | 90% | 216 | £12,221 | £2.64 |
| Co-operative, Cheriton Road, Folkestone | 145 | 90% | 131 | £10,298 | £1.34 |
| | **17,337** | | **12,078** | | **£141.96** |
| **Cheriton** | | | | | |
| Tesco Extra, Cheriton High Street, Cheriton | 3,569 | 70% | 2,498 | £12,221 | £30.53 |
| Co-operative, Cheriton High Street | 333 | 90% | 300 | £10,298 | £3.09 |
| Marks & Spencer (BP), Cheriton High Street | 84 | 90% | 76 | £11,283 | £0.85 |
| | **3,986** | | **2,874** | | **£34.47** |
| **Hythe** | | | | | |
| Sainsbury's, Military Road, Hythe | 3,139 | 72% | 2,260 | £11,068 | £25.01 |
| Waitrose, Prospect Road, Hythe | 1,634 | 85% | 1,389 | £13,042 | £18.11 |
| Aldi, High Street, Hythe | 1,314 | 80% | 1,051 | £11,145 | £11.72 |
| Iceland, High Street, Hythe | 273 | 90% | 246 | £6,451 | £1.59 |
| | **6,360** | | **4,946** | | **£56.43** |
| **New Romney** | | | | | |
| Sainsbury's, Dymchurch Road, New Romney | 1,094 | 80% | 875 | £11,068 | £9.69 |
| | **1,094** | | **875** | | **£9.69** |
| **Dymchurch** | | | | | £0.00 |
| Tesco Express, High Street, Dymchurch | 175 | 90% | 158 | £12,221 | £1.92 |
| | **175** | | **158** | | **£1.92** |
| **Hawkinge** | | | | | |
| Lidl, Haven Drive, Hawkinge | 1,256 | 73% | 917 | £8,661 | £7.94 |
| Tesco Express, Canterbury Road, Hawkinge | 179 | 90% | 161 | £12,221 | £1.97 |
| | **1,435** | | **1,078** | | **£9.91** |
| **Lydd** | | | | | |
| McColls, High Street, Lydd | 132 | 95% | 125 | £5,000 | £0.63 |
| McColls, Taylor Road, Lydd-on-Sea | 24 | 95% | 23 | £5,000 | £0.11 |
| | **156** | | **148** | | **£0.74** |
| **Sellindge** | | | | | |
| Co-operative, Main Road, Sellindge | 143 | 90% | 129 | £10,298 | £1.33 |
| | **143** | | **129** | | **£1.33** |
| **TOTAL** | **30,686** | | **22,285** | | **£256.45** |

*Source: VOA, ORC Storepoint 2018 and Global Data 2017*

**Table 11A - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - Baseline growth**

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone/Cheriton | 155.33 | 157.74 | 158.92 | 160.17 | 161.05 |
| Zone 2 - Hythe | 61.80 | 62.90 | 64.68 | 66.36 | 67.96 |
| Zone 3 - New Romney | 22.85 | 23.27 | 23.36 | 23.36 | 23.24 |
| Other in District (Zone 4/6) | 14.50 | 14.83 | 15.13 | 15.37 | 15.55 |
| Otterpool Park | 0.00 | 1.16 | 7.73 | 14.86 | 22.72 |
| **Total** | **254.48** | **259.89** | **269.83** | **280.11** | **290.53** |
| **Turnover of Existing Facilities** | | | | | |
| Zone 1 - Folkestone/Cheriton | 176.43 | 176.43 | 176.43 | 176.43 | 176.43 |
| Zone 2 - Hythe | 56.43 | 56.43 | 56.43 | 56.43 | 56.43 |
| Zone 3 - New Romney | 11.61 | 11.61 | 11.61 | 11.61 | 11.61 |
| Other in District | 11.98 | 11.98 | 11.98 | 11.98 | 11.98 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **256.45** | **256.45** | **256.45** | **256.45** | **256.45** |
| **Surplus/Deficit Expenditure £M** | | | | | |
| Zone 1 - Folkestone/Cheriton | -21.10 | -18.69 | -17.51 | -16.26 | -15.38 |
| Zone 2 - Hythe | 5.37 | 6.47 | 8.25 | 9.93 | 11.53 |
| Zone 3 - New Romney | 11.24 | 11.66 | 11.75 | 11.74 | 11.63 |
| Other in District | 2.53 | 2.86 | 3.16 | 3.40 | 3.58 |
| Otterpool Park | 0.00 | 1.16 | 7.73 | 14.86 | 22.72 |
| **Total** | **-1.96** | **3.45** | **13.38** | **23.67** | **34.08** |

*Source: Tables 5, 6A to 9A and 10*

**Table 11B - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - High growth**

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone/Cheriton | 155.33 | 157.75 | 159.00 | 160.32 | 161.30 |
| Zone 2 - Hythe | 61.80 | 62.94 | 64.98 | 66.93 | 68.83 |
| Zone 3 - New Romney | 22.85 | 23.27 | 23.36 | 23.36 | 23.24 |
| Other in District (Zone 4/6) | 14.50 | 14.83 | 15.13 | 15.37 | 15.55 |
| Otterpool Park | 0.00 | 1.34 | 8.96 | 17.22 | 26.34 |
| **Total** | **254.48** | **260.14** | **271.44** | **283.20** | **295.26** |
| **Turnover of Existing Facilities** | | | | | |
| Zone 1 - Folkestone/Cheriton | 176.43 | 176.43 | 176.43 | 176.43 | 176.43 |
| Zone 2 - Hythe | 56.43 | 56.43 | 56.43 | 56.43 | 56.43 |
| Zone 3 - New Romney | 11.61 | 11.61 | 11.61 | 11.61 | 11.61 |
| Other in District | 11.98 | 11.98 | 11.98 | 11.98 | 11.98 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **256.45** | **256.45** | **256.45** | **256.45** | **256.45** |
| **Surplus/Deficit Expenditure £M** | | | | | |
| Zone 1 - Folkestone/Cheriton | -21.10 | -18.68 | -17.43 | -16.11 | -15.14 |
| Zone 2 - Hythe | 5.37 | 6.51 | 8.55 | 10.50 | 12.40 |
| Zone 3 - New Romney | 11.24 | 11.66 | 11.75 | 11.74 | 11.63 |
| Other in District | 2.53 | 2.86 | 3.16 | 3.40 | 3.58 |
| Otterpool Park | 0.00 | 1.34 | 8.96 | 17.22 | 26.34 |
| **Total** | **-1.96** | **3.69** | **14.99** | **26.76** | **38.81** |

*Source: Tables 5, 6B to 9B and 10*

**Table 12A - Folkestone & Hythe District Convenience Goods Floorspace Capacity - Baseline Growth**

| | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|
| **Turnover Density New Floorspace (£ per sq.m)** | £12,000 | £12,000 | £12,000 | £12,000 |
| **Floorspace Projection (sq.m net)** | | | | |
| Zone 1 - Folkestone/Cheriton | -1,558 | -1,459 | -1,355 | -1,281 |
| Zone 2 - Hythe | 539 | 688 | 828 | 961 |
| Zone 3 - New Romney | 971 | 979 | 979 | 969 |
| Other in District (Zone 4/6) | 238 | 263 | 283 | 298 |
| Otterpool Park | 96 | 644 | 1,238 | 1,894 |
| **Total** | **287** | **1,115** | **1,972** | **2,840** |
| **Floorspace Projection (sq.m gross)** | | | | |
| Zone 1 - Folkestone/Cheriton | -2,225 | -2,085 | -1,936 | -1,831 |
| Zone 2 - Hythe | 770 | 983 | 1,182 | 1,373 |
| Zone 3 - New Romney | 1,388 | 1,398 | 1,398 | 1,384 |
| Other in District | 340 | 376 | 404 | 426 |
| Otterpool Park | 138 | 921 | 1,769 | 2,705 |
| **Total** | **410** | **1,593** | **2,817** | **4,057** |

*Source: Table 11A*

**Table 12B - Folkestone & Hythe District Convenience Goods Floorspace Capacity - High Growth**

| | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|
| **Turnover Density New Floorspace (£ per sq.m)** | £12,000 | £12,000 | £12,000 | £12,000 |
| **Floorspace Projection (sq.m net)** | | | | |
| Zone 1 - Folkestone/Cheriton | -1,557 | -1,452 | -1,342 | -1,261 |
| Zone 2 - Hythe | 543 | 712 | 875 | 1,033 |
| Zone 3 - New Romney | 971 | 979 | 979 | 969 |
| Other in District (Zone 4/6) | 238 | 263 | 283 | 298 |
| Otterpool Park | 112 | 747 | 1,435 | 2,195 |
| **Total** | **308** | **1,249** | **2,230** | **3,234** |
| **Floorspace Projection (sq.m gross)** | | | | |
| Zone 1 - Folkestone/Cheriton | -2,224 | -2,075 | -1,917 | -1,802 |
| Zone 2 - Hythe | 776 | 1,018 | 1,250 | 1,476 |
| Zone 3 - New Romney | 1,388 | 1,398 | 1,398 | 1,384 |
| Other in District | 340 | 376 | 404 | 426 |
| Otterpool Park | 160 | 1,067 | 2,050 | 3,136 |
| **Total** | **439** | **1,784** | **3,185** | **4,620** |

*Source: Table 11B*

# Appendix 3: Comparison goods capacity

**Table 1A - Study Area Population (Baseline)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 588 | 3,940 | 7,564 | 11,550 |
| **Total** | **130,933** | **134,638** | **139,557** | **144,224** | **148,700** |

*Sources:*

*Experian MMG 3 Population Projections 2016*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 280 dwellings (588 people)*
*2027 = 1,876 dwellings (3,940 people)*
*2032 = 3,602 dwellings (7,564 people)*
*2037 = 5,500 dwellings (11,550 people)*

**Table 1B - Study Area Population (Higher Growth)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 683 | 4,568 | 8,768 | 13,388 |
| **Total** | **130,933** | **134,733** | **140,185** | **145,428** | **150,538** |

*Sources:*

*Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 325 dwellings (683 people)*
*2027 = 2,175 dwellings (4,568 people)*
*2032 = 4,175 dwellings (8,768 people)*
*2037 = 6,375 dwellings (13,388 people)*
*Otterpool Park Masterplan 875 additional dwellings at 2037 over and above Core Strategy (5,500 dwgs)*

**Table 2 - Comparison Goods Expenditure per person per annum (£)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 2,868 | 3,150 | 3,669 | 4,285 | 4,997 |
| Zone 2 - Hythe | 3,626 | 3,982 | 4,639 | 5,417 | 6,318 |
| Zone 3 - New Romney & Dymchurch | 3,190 | 3,504 | 4,081 | 4,766 | 5,559 |
| Zone 4 - Lydd | 2,778 | 3,051 | 3,554 | 4,150 | 4,840 |
| Zone 5 - Sellinge & Ashford fringes | 4,044 | 4,442 | 5,174 | 6,042 | 7,047 |
| Zone 6 - Hawkinge, Lyminge & Capel | 3,760 | 4,130 | 4,811 | 5,618 | 6,552 |
| Zone 7 - Rural north and Dover fringes | 4,214 | 4,629 | 5,392 | 6,296 | 7,343 |
| Otterpool Park | 3,497 | 3,841 | 4,474 | 5,225 | 6,094 |

*Sources:*
*Experian Local Expenditure 2016 (2016 prices)*
*Growth Rates: 0.9% in 2018, 2.1% in 2019 and 3.2% beyond 2019*
*Excludes Special Forms of Trading*

**Table 3A - Total Comparison Expenditure (£m) - Baseline**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 150.98 | 169.06 | 197.42 | 231.08 | 269.51 |
| Zone 2 - Hythe | 66.53 | 74.18 | 86.32 | 100.09 | 115.20 |
| Zone 3 - New Romney & Dymchurch | 53.24 | 59.82 | 69.86 | 81.32 | 93.94 |
| Zone 4 - Lydd | 17.70 | 20.05 | 23.67 | 27.84 | 32.54 |
| Zone 5 - Sellinge & Ashford fringes | 50.38 | 57.71 | 70.93 | 86.26 | 104.29 |
| Zone 6 - Hawkinge, Lyminge & Capel | 56.23 | 63.47 | 75.04 | 88.36 | 103.17 |
| Zone 7 - Rural north and Dover fringes | 39.90 | 45.12 | 54.54 | 65.98 | 79.41 |
| Otterpool Park | 0.00 | 2.26 | 17.63 | 39.52 | 70.39 |
| **Study Area Total** | **434.96** | **491.67** | **595.42** | **720.45** | **868.45** |

*Source: Tables 1A and 2*

**Table 3B - Total Comparison Expenditure (£m) - High Growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 150.98 | 169.06 | 197.42 | 231.08 | 269.51 |
| Zone 2 - Hythe | 66.53 | 74.18 | 86.32 | 100.09 | 115.20 |
| Zone 3 - New Romney & Dymchurch | 53.24 | 59.82 | 69.86 | 81.32 | 93.94 |
| Zone 4 - Lydd | 17.70 | 20.05 | 23.67 | 27.84 | 32.54 |
| Zone 5 - Sellinge & Ashford fringes | 50.38 | 57.71 | 70.93 | 86.26 | 104.29 |
| Zone 6 - Hawkinge, Lyminge & Capel | 56.23 | 63.47 | 75.04 | 88.36 | 103.17 |
| Zone 7 - Rural north and Dover fringes | 39.90 | 45.12 | 54.54 | 65.98 | 79.41 |
| Otterpool Park | 0.00 | 2.62 | 20.44 | 45.81 | 81.59 |
| **Study Area Total** | **434.96** | **492.04** | **598.22** | **726.74** | **879.65** |

*Source: Tables 1B and 2*

**Table 4 - Base Year Comparison Goods Market Shares by Zone (%)**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inlfow |
|---|---|---|---|---|---|---|---|---|---|
| Zone 1 - Folkestone | 75.6% | 45.9% | 21.3% | 10.8% | 8.3% | 60.9% | 10.2% | 30.0% | 15.0% |
| Zone 2 - Hythe | 1.5% | 17.5% | 4.5% | 1.8% | 1.5% | 1.6% | 0.6% | 10.0% | 15.0% |
| Zone 3 - New Romney | 0.0% | 0.1% | 10.4% | 5.7% | 0.1% | 0.0% | 0.0% | 0.0% | 15.0% |
| Other in District (Zone 4/6) | 0.1% | 0.0% | 0.0% | 2.3% | 0.0% | 0.6% | 0.1% | 0.0% | 15.0% |
| Otterpool Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 15.0% |
| **District Total** | **77.2%** | **63.5%** | **36.2%** | **20.6%** | **9.9%** | **63.1%** | **10.9%** | **90.0%** | |
| Rest of study area (outside District) | 0.0% | 0.0% | 0.0% | 0.5% | 1.1% | 0.0% | 0.4% | 0.0% | |
| Ashford | 5.6% | 14.9% | 48.5% | 44.0% | 61.9% | 9.6% | 12.1% | 5.0% | |
| Canterbury | 11.0% | 14.7% | 6.2% | 4.2% | 15.6% | 23.1% | 53.4% | 5.0% | |
| Dover | 0.8% | 0.5% | 0.2% | 0.3% | 0.1% | 1.5% | 13.2% | 0.0% | |
| Central London/West End | 1.1% | 1.7% | 1.2% | 0.9% | 1.7% | 0.5% | 1.5% | 0.0% | |
| Hastings | 0.0% | 0.0% | 0.6% | 12.4% | 0.5% | 0.2% | 0.0% | 0.0% | |
| Bluewater/Intu Lakeside | 1.3% | 2.3% | 3.8% | 0.9% | 2.1% | 0.5% | 2.3% | 0.0% | |
| Rye | 0.0% | 0.0% | 0.4% | 6.5% | 0.0% | 0.0% | 0.2% | 0.0% | |
| Maidstone | 0.6% | 0.3% | 1.2% | 1.7% | 1.5% | 0.3% | 0.3% | 0.0% | |
| Other centres | 2.4% | 2.1% | 1.7% | 8.0% | 5.6% | 1.2% | 5.7% | 0.0% | |
| **Outside District Total** | **22.8%** | **36.5%** | **63.8%** | **79.4%** | **90.1%** | **36.9%** | **89.1%** | **10.0%** | |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: PBA Shepway Town Centres Study 2014 / NEMS Household Survey May 2014*

**Table 5 - Base Year 2018 Comparison Goods Expenditure Patterns (£M)**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2018** | **150.98** | **66.53** | **53.24** | **17.70** | **50.38** | **56.23** | **39.90** | **0.00** | | **434.96** |
| Zone 1 - Folkestone | 114.14 | 30.54 | 11.34 | 1.91 | 4.18 | 34.24 | 4.07 | 0.00 | 35.37 | 235.79 |
| Zone 2 - Hythe | 2.26 | 11.64 | 2.40 | 0.32 | 0.76 | 0.90 | 0.24 | 0.00 | 3.27 | 21.78 |
| Zone 3 - New Romney | 0.00 | 0.07 | 5.54 | 1.01 | 0.05 | 0.00 | 0.00 | 0.00 | 1.18 | 7.84 |
| Other in District (Zone 4/6) | 0.15 | 0.00 | 0.00 | 0.41 | 0.00 | 0.34 | 0.04 | 0.00 | 0.17 | 1.10 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **District Total** | **116.55** | **42.25** | **19.27** | **3.65** | **4.99** | **35.48** | **4.35** | **0.00** | **39.98** | **266.52** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.09 | 0.55 | 0.00 | 0.16 | 0.00 | | 0.80 |
| Ashford | 8.45 | 9.91 | 25.82 | 7.79 | 31.18 | 5.40 | 4.83 | 0.00 | | 93.39 |
| Canterbury | 16.61 | 9.78 | 3.30 | 0.74 | 7.86 | 12.99 | 21.31 | 0.00 | | 72.59 |
| Dover | 1.21 | 0.33 | 0.11 | 0.05 | 0.05 | 0.84 | 5.27 | 0.00 | | 7.86 |
| Central London/West End | 1.66 | 1.13 | 0.64 | 0.16 | 0.86 | 0.28 | 0.60 | 0.00 | | 5.33 |
| Hastings | 0.00 | 0.00 | 0.32 | 2.19 | 0.25 | 0.11 | 0.00 | 0.00 | | 2.88 |
| Bluewater/Intu Lakeside | 1.96 | 1.53 | 2.02 | 0.16 | 1.06 | 0.28 | 0.92 | 0.00 | | 7.93 |
| Rye | 0.00 | 0.00 | 0.21 | 1.15 | 0.00 | 0.00 | 0.08 | 0.00 | | 1.44 |
| Maidstone | 0.91 | 0.20 | 0.64 | 0.30 | 0.76 | 0.17 | 0.12 | 0.00 | | 3.09 |
| Other centres | 3.62 | 1.40 | 0.91 | 1.42 | 2.82 | 0.67 | 2.27 | 0.00 | | 13.11 |
| **Outside District Total** | **34.42** | **24.28** | **33.97** | **14.05** | **45.39** | **20.75** | **35.55** | **0.00** | | **208.42** |
| **TOTAL** | **150.98** | **66.53** | **53.24** | **17.70** | **50.38** | **56.23** | **39.90** | **0.00** | **39.98** | **474.94** |

*Source: Tables 3A and 4*

**Table 5A - Future 2022 Comparison Goods Expenditure Patterns (£M) - Baseline**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **169.06** | **74.18** | **59.82** | **20.05** | **57.71** | **63.47** | **45.12** | **2.26** | | **491.67** |
| Zone 1 - Folkestone | 127.81 | 34.05 | 12.74 | 2.17 | 4.79 | 38.65 | 4.60 | 0.68 | 39.79 | 265.28 |
| Zone 2 - Hythe | 2.54 | 12.98 | 2.69 | 0.36 | 0.87 | 1.02 | 0.27 | 0.23 | 3.70 | 24.64 |
| Zone 3 - New Romney | 0.00 | 0.07 | 6.22 | 1.14 | 0.06 | 0.00 | 0.00 | 0.00 | 1.32 | 8.82 |
| Other in District (Zone 4/6) | 0.17 | 0.00 | 0.00 | 0.46 | 0.00 | 0.38 | 0.05 | 0.00 | 0.19 | 1.24 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.13 | 0.20 | 1.33 |
| **District Total** | **130.51** | **47.10** | **21.65** | **4.13** | **5.71** | **40.05** | **4.92** | **2.03** | **45.20** | **301.32** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.10 | 0.63 | 0.00 | 0.18 | 0.00 | | 0.92 |
| Ashford | 9.47 | 11.05 | 29.01 | 8.82 | 35.72 | 6.09 | 5.46 | 0.11 | | 105.74 |
| Canterbury | 18.60 | 10.90 | 3.71 | 0.84 | 9.00 | 14.66 | 24.10 | 0.11 | | 81.92 |
| Dover | 1.35 | 0.37 | 0.12 | 0.06 | 0.06 | 0.95 | 5.96 | 0.00 | | 8.87 |
| Central London/West End | 1.86 | 1.26 | 0.72 | 0.18 | 0.98 | 0.32 | 0.68 | 0.00 | | 5.99 |
| Hastings | 0.00 | 0.00 | 0.36 | 2.49 | 0.29 | 0.13 | 0.00 | 0.00 | | 3.26 |
| Bluewater/Intu Lakeside | 2.20 | 1.71 | 2.27 | 0.18 | 1.21 | 0.32 | 1.04 | 0.00 | | 8.92 |
| Rye | 0.00 | 0.00 | 0.24 | 1.30 | 0.00 | 0.00 | 0.09 | 0.00 | | 1.63 |
| Maidstone | 1.01 | 0.22 | 0.72 | 0.34 | 0.87 | 0.19 | 0.14 | 0.00 | | 3.49 |
| Other centres | 4.06 | 1.56 | 1.02 | 1.60 | 3.23 | 0.76 | 2.57 | 0.00 | | 14.80 |
| **Outside District Total** | **38.55** | **27.08** | **38.17** | **15.92** | **51.99** | **23.42** | **40.21** | **0.23** | | **235.55** |
| **TOTAL** | **169.06** | **74.18** | **59.82** | **20.05** | **57.71** | **63.47** | **45.12** | **2.26** | **45.20** | **536.87** |

*Source: Tables 3A and 4*

**Table 5B - Future 2022 Comparison Goods Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **169.06** | **74.18** | **59.82** | **20.05** | **57.71** | **63.47** | **45.12** | **2.62** | | **492.04** |
| Zone 1 - Folkestone | 127.81 | 34.05 | 12.74 | 2.17 | 4.79 | 38.65 | 4.60 | 0.79 | 39.81 | 265.41 |
| Zone 2 - Hythe | 2.54 | 12.98 | 2.69 | 0.36 | 0.87 | 1.02 | 0.27 | 0.26 | 3.70 | 24.69 |
| Zone 3 - New Romney | 0.00 | 0.07 | 6.22 | 1.14 | 0.06 | 0.00 | 0.00 | 0.00 | 1.32 | 8.82 |
| Other in District (Zone 4/6) | 0.17 | 0.00 | 0.00 | 0.46 | 0.00 | 0.38 | 0.05 | 0.00 | 0.19 | 1.24 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.31 | 0.23 | 1.54 |
| **District Total** | **130.51** | **47.10** | **21.65** | **4.13** | **5.71** | **40.05** | **4.92** | **2.36** | **45.26** | **301.70** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.10 | 0.63 | 0.00 | 0.18 | 0.00 | | 0.92 |
| Ashford | 9.47 | 11.05 | 29.01 | 8.82 | 35.72 | 6.09 | 5.46 | 0.13 | | 105.76 |
| Canterbury | 18.60 | 10.90 | 3.71 | 0.84 | 9.00 | 14.66 | 24.10 | 0.13 | | 81.94 |
| Dover | 1.35 | 0.37 | 0.12 | 0.06 | 0.06 | 0.95 | 5.96 | 0.00 | | 8.87 |
| Central London/West End | 1.86 | 1.26 | 0.72 | 0.18 | 0.98 | 0.32 | 0.68 | 0.00 | | 5.99 |
| Hastings | 0.00 | 0.00 | 0.36 | 2.49 | 0.29 | 0.13 | 0.00 | 0.00 | | 3.26 |
| Bluewater/Intu Lakeside | 2.20 | 1.71 | 2.27 | 0.18 | 1.21 | 0.32 | 1.04 | 0.00 | | 8.92 |
| Rye | 0.00 | 0.00 | 0.24 | 1.30 | 0.00 | 0.00 | 0.09 | 0.00 | | 1.63 |
| Maidstone | 1.01 | 0.22 | 0.72 | 0.34 | 0.87 | 0.19 | 0.14 | 0.00 | | 3.49 |
| Other centres | 4.06 | 1.56 | 1.02 | 1.60 | 3.23 | 0.76 | 2.57 | 0.00 | | 14.80 |
| **Outside District Total** | **38.55** | **27.08** | **38.17** | **15.92** | **51.99** | **23.42** | **40.21** | **0.26** | | **235.59** |
| **TOTAL** | **169.06** | **74.18** | **59.82** | **20.05** | **57.71** | **63.47** | **45.12** | **2.62** | **45.26** | **537.29** |

*Source: Tables 3B and 4*

**Table 6A - Future 2027 Comparison Goods Expenditure Patterns (£M) - Baseline**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **197.42** | **86.32** | **69.86** | **23.67** | **70.93** | **75.04** | **54.54** | **17.63** | | **595.42** |
| Zone 1 - Folkestone | 149.25 | 39.62 | 14.88 | 2.56 | 5.89 | 45.70 | 5.56 | 5.29 | 47.43 | 316.17 |
| Zone 2 - Hythe | 2.96 | 15.11 | 3.14 | 0.43 | 1.06 | 1.20 | 0.33 | 1.76 | 4.59 | 30.58 |
| Zone 3 - New Romney | 0.00 | 0.09 | 7.27 | 1.35 | 0.07 | 0.00 | 0.00 | 0.00 | 1.55 | 10.32 |
| Other in District (Zone 4/6) | 0.20 | 0.00 | 0.00 | 0.54 | 0.00 | 0.45 | 0.05 | 0.00 | 0.22 | 1.47 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.81 | 1.56 | 10.37 |
| **District Total** | **152.41** | **54.81** | **25.29** | **4.88** | **7.02** | **47.35** | **5.94** | **15.86** | **55.34** | **368.91** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.12 | 0.78 | 0.00 | 0.22 | 0.00 | | 1.12 |
| Ashford | 11.06 | 12.86 | 33.88 | 10.42 | 43.91 | 7.20 | 6.60 | 0.88 | | 126.81 |
| Canterbury | 21.72 | 12.69 | 4.33 | 0.99 | 11.07 | 17.33 | 29.12 | 0.88 | | 98.14 |
| Dover | 1.58 | 0.43 | 0.14 | 0.07 | 0.07 | 1.13 | 7.20 | 0.00 | | 10.62 |
| Central London/West End | 2.17 | 1.47 | 0.84 | 0.21 | 1.21 | 0.38 | 0.82 | 0.00 | | 7.09 |
| Hastings | 0.00 | 0.00 | 0.42 | 2.94 | 0.35 | 0.15 | 0.00 | 0.00 | | 3.86 |
| Bluewater/Intu Lakeside | 2.57 | 1.99 | 2.65 | 0.21 | 1.49 | 0.38 | 1.25 | 0.00 | | 10.54 |
| Rye | 0.00 | 0.00 | 0.28 | 1.54 | 0.00 | 0.00 | 0.11 | 0.00 | | 1.93 |
| Maidstone | 1.18 | 0.26 | 0.84 | 0.40 | 1.06 | 0.23 | 0.16 | 0.00 | | 4.14 |
| Other centres | 4.74 | 1.81 | 1.19 | 1.89 | 3.97 | 0.90 | 3.11 | 0.00 | | 17.61 |
| **Outside District Total** | **45.01** | **31.51** | **44.57** | **18.80** | **63.91** | **27.69** | **48.60** | **1.76** | | **281.84** |
| **TOTAL** | **197.42** | **86.32** | **69.86** | **23.67** | **70.93** | **75.04** | **54.54** | **17.63** | **55.34** | **650.75** |

*Source: Tables 3A and 4*

**Table 6B - Future 2027 Comparison Goods Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **197.42** | **86.32** | **69.86** | **23.67** | **70.93** | **75.04** | **54.54** | **20.44** | | **598.22** |
| Zone 1 - Folkestone | 149.25 | 39.62 | 14.88 | 2.56 | 5.89 | 45.70 | 5.56 | 6.13 | 47.57 | 317.16 |
| Zone 2 - Hythe | 2.96 | 15.11 | 3.14 | 0.43 | 1.06 | 1.20 | 0.33 | 2.04 | 4.64 | 30.91 |
| Zone 3 - New Romney | 0.00 | 0.09 | 7.27 | 1.35 | 0.07 | 0.00 | 0.00 | 0.00 | 1.55 | 10.32 |
| Other in District (Zone 4/6) | 0.20 | 0.00 | 0.00 | 0.54 | 0.00 | 0.45 | 0.05 | 0.00 | 0.22 | 1.47 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 10.22 | 1.80 | 12.02 |
| **District Total** | **152.41** | **54.81** | **25.29** | **4.88** | **7.02** | **47.35** | **5.94** | **18.39** | **55.78** | **371.88** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.12 | 0.78 | 0.00 | 0.22 | 0.00 | | 1.12 |
| Ashford | 11.06 | 12.86 | 33.88 | 10.42 | 43.91 | 7.20 | 6.60 | 1.02 | | 126.95 |
| Canterbury | 21.72 | 12.69 | 4.33 | 0.99 | 11.07 | 17.33 | 29.12 | 1.02 | | 98.28 |
| Dover | 1.58 | 0.43 | 0.14 | 0.07 | 0.07 | 1.13 | 7.20 | 0.00 | | 10.62 |
| Central London/West End | 2.17 | 1.47 | 0.84 | 0.21 | 1.21 | 0.38 | 0.82 | 0.00 | | 7.09 |
| Hastings | 0.00 | 0.00 | 0.42 | 2.94 | 0.35 | 0.15 | 0.00 | 0.00 | | 3.86 |
| Bluewater/Intu Lakeside | 2.57 | 1.99 | 2.65 | 0.21 | 1.49 | 0.38 | 1.25 | 0.00 | | 10.54 |
| Rye | 0.00 | 0.00 | 0.28 | 1.54 | 0.00 | 0.00 | 0.11 | 0.00 | | 1.93 |
| Maidstone | 1.18 | 0.26 | 0.84 | 0.40 | 1.06 | 0.23 | 0.16 | 0.00 | | 4.14 |
| Other centres | 4.74 | 1.81 | 1.19 | 1.89 | 3.97 | 0.90 | 3.11 | 0.00 | | 17.61 |
| **Outside District Total** | **45.01** | **31.51** | **44.57** | **18.80** | **63.91** | **27.69** | **48.60** | **2.04** | | **282.12** |
| **TOTAL** | **197.42** | **86.32** | **69.86** | **23.67** | **70.93** | **75.04** | **54.54** | **20.44** | **55.78** | **654.01** |

*Source: Tables 3B and 4*

**Table 7A - Future 2032 Comparison Goods Expenditure Patterns (£M) - Baseline**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **231.08** | **100.09** | **81.32** | **27.84** | **86.26** | **88.36** | **65.98** | **39.52** | | **720.45** |
| Zone 1 - Folkestone | 174.70 | 45.94 | 17.32 | 3.01 | 7.16 | 53.81 | 6.73 | 11.86 | 56.56 | 377.09 |
| Zone 2 - Hythe | 3.47 | 17.52 | 3.66 | 0.50 | 1.29 | 1.41 | 0.40 | 3.95 | 5.68 | 37.88 |
| Zone 3 - New Romney | 0.00 | 0.10 | 8.46 | 1.59 | 0.09 | 0.00 | 0.00 | 0.00 | 1.81 | 12.04 |
| Other in District (Zone 4/6) | 0.23 | 0.00 | 0.00 | 0.64 | 0.00 | 0.53 | 0.07 | 0.00 | 0.26 | 1.73 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 19.76 | 3.49 | 23.25 |
| **District Total** | **178.39** | **63.56** | **29.44** | **5.73** | **8.54** | **55.76** | **7.19** | **35.57** | **67.80** | **451.98** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.14 | 0.95 | 0.00 | 0.26 | 0.00 | | 1.35 |
| Ashford | 12.94 | 14.91 | 39.44 | 12.25 | 53.40 | 8.48 | 7.98 | 1.98 | | 151.38 |
| Canterbury | 25.42 | 14.71 | 5.04 | 1.17 | 13.46 | 20.41 | 35.23 | 1.98 | | 117.42 |
| Dover | 1.85 | 0.50 | 0.16 | 0.08 | 0.09 | 1.33 | 8.71 | 0.00 | | 12.72 |
| Central London/West End | 2.54 | 1.70 | 0.98 | 0.25 | 1.47 | 0.44 | 0.99 | 0.00 | | 8.37 |
| Hastings | 0.00 | 0.00 | 0.49 | 3.45 | 0.43 | 0.18 | 0.00 | 0.00 | | 4.55 |
| Bluewater/Intu Lakeside | 3.00 | 2.30 | 3.09 | 0.25 | 1.81 | 0.44 | 1.52 | 0.00 | | 12.42 |
| Rye | 0.00 | 0.00 | 0.33 | 1.81 | 0.00 | 0.00 | 0.13 | 0.00 | | 2.27 |
| Maidstone | 1.39 | 0.30 | 0.98 | 0.47 | 1.29 | 0.27 | 0.20 | 0.00 | | 4.89 |
| Other centres | 5.55 | 2.10 | 1.38 | 2.23 | 4.83 | 1.06 | 3.76 | 0.00 | | 20.91 |
| **Outside District Total** | **52.69** | **36.53** | **51.88** | **22.10** | **77.72** | **32.60** | **58.79** | **3.95** | | **336.27** |
| **TOTAL** | **231.08** | **100.09** | **81.32** | **27.84** | **86.26** | **88.36** | **65.98** | **39.52** | **67.80** | **788.25** |

*Source: Tables 3A and 4*

**Table 7B - Future 2032 Comparison Goods Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **231.08** | **100.09** | **81.32** | **27.84** | **86.26** | **88.36** | **65.98** | **45.81** | | **726.74** |
| Zone 1 - Folkestone | 174.70 | 45.94 | 17.32 | 3.01 | 7.16 | 53.81 | 6.73 | 13.74 | 56.90 | 379.31 |
| Zone 2 - Hythe | 3.47 | 17.52 | 3.66 | 0.50 | 1.29 | 1.41 | 0.40 | 4.58 | 5.79 | 38.62 |
| Zone 3 - New Romney | 0.00 | 0.10 | 8.46 | 1.59 | 0.09 | 0.00 | 0.00 | 0.00 | 1.81 | 12.04 |
| Other in District (Zone 4/6) | 0.23 | 0.00 | 0.00 | 0.64 | 0.00 | 0.53 | 0.07 | 0.00 | 0.26 | 1.73 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.91 | 4.04 | 26.95 |
| **District Total** | **178.39** | **63.56** | **29.44** | **5.73** | **8.54** | **55.76** | **7.19** | **41.23** | **68.80** | **458.64** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.14 | 0.95 | 0.00 | 0.26 | 0.00 | | 1.35 |
| Ashford | 12.94 | 14.91 | 39.44 | 12.25 | 53.40 | 8.48 | 7.98 | 2.29 | | 151.69 |
| Canterbury | 25.42 | 14.71 | 5.04 | 1.17 | 13.46 | 20.41 | 35.23 | 2.29 | | 117.74 |
| Dover | 1.85 | 0.50 | 0.16 | 0.08 | 0.09 | 1.33 | 8.71 | 0.00 | | 12.72 |
| Central London/West End | 2.54 | 1.70 | 0.98 | 0.25 | 1.47 | 0.44 | 0.99 | 0.00 | | 8.37 |
| Hastings | 0.00 | 0.00 | 0.49 | 3.45 | 0.43 | 0.18 | 0.00 | 0.00 | | 4.55 |
| Bluewater/Intu Lakeside | 3.00 | 2.30 | 3.09 | 0.25 | 1.81 | 0.44 | 1.52 | 0.00 | | 12.42 |
| Rye | 0.00 | 0.00 | 0.33 | 1.81 | 0.00 | 0.00 | 0.13 | 0.00 | | 2.27 |
| Maidstone | 1.39 | 0.30 | 0.98 | 0.47 | 1.29 | 0.27 | 0.20 | 0.00 | | 4.89 |
| Other centres | 5.55 | 2.10 | 1.38 | 2.23 | 4.83 | 1.06 | 3.76 | 0.00 | | 20.91 |
| **Outside District Total** | **52.69** | **36.53** | **51.88** | **22.10** | **77.72** | **32.60** | **58.79** | **4.58** | | **336.90** |
| **TOTAL** | **231.08** | **100.09** | **81.32** | **27.84** | **86.26** | **88.36** | **65.98** | **45.81** | **68.80** | **795.54** |

*Source: Tables 3B and 4*

### Table 8A - Future 2037 Comparison Goods Expenditure Patterns (£M) - Baseline

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **269.51** | **115.20** | **93.94** | **32.54** | **104.29** | **103.17** | **79.41** | **70.39** | | **868.45** |
| Zone 1 - Folkestone | 203.75 | 52.88 | 20.01 | 3.51 | 8.66 | 62.83 | 8.10 | 21.12 | 67.21 | 448.06 |
| Zone 2 - Hythe | 4.04 | 20.16 | 4.23 | 0.59 | 1.56 | 1.65 | 0.48 | 7.04 | 7.01 | 46.76 |
| Zone 3 - New Romney | 0.00 | 0.12 | 9.77 | 1.85 | 0.10 | 0.00 | 0.00 | 0.00 | 2.09 | 13.93 |
| Other in District (Zone 4/6) | 0.27 | 0.00 | 0.00 | 0.75 | 0.00 | 0.62 | 0.08 | 0.00 | 0.30 | 2.02 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 35.19 | 6.21 | 41.40 |
| **District Total** | **208.06** | **73.15** | **34.00** | **6.70** | **10.32** | **65.10** | **8.66** | **63.35** | **82.83** | **552.18** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.16 | 1.15 | 0.00 | 0.32 | 0.00 | | 1.63 |
| Ashford | 15.09 | 17.17 | 45.56 | 14.32 | 64.55 | 9.90 | 9.61 | 3.52 | | 179.72 |
| Canterbury | 29.65 | 16.93 | 5.82 | 1.37 | 16.27 | 23.83 | 42.41 | 3.52 | | 139.80 |
| Dover | 2.16 | 0.58 | 0.19 | 0.10 | 0.10 | 1.55 | 10.48 | 0.00 | | 15.15 |
| Central London/West End | 2.96 | 1.96 | 1.13 | 0.29 | 1.77 | 0.52 | 1.19 | 0.00 | | 9.82 |
| Hastings | 0.00 | 0.00 | 0.56 | 4.03 | 0.52 | 0.21 | 0.00 | 0.00 | | 5.33 |
| Bluewater/Intu Lakeside | 3.50 | 2.65 | 3.57 | 0.29 | 2.19 | 0.52 | 1.83 | 0.00 | | 14.55 |
| Rye | 0.00 | 0.00 | 0.38 | 2.12 | 0.00 | 0.00 | 0.16 | 0.00 | | 2.65 |
| Maidstone | 1.62 | 0.35 | 1.13 | 0.55 | 1.56 | 0.31 | 0.24 | 0.00 | | 5.76 |
| Other centres | 6.47 | 2.42 | 1.60 | 2.60 | 5.84 | 1.24 | 4.53 | 0.00 | | 24.69 |
| **Outside District Total** | **61.45** | **42.05** | **59.93** | **25.84** | **93.96** | **38.07** | **70.76** | **7.04** | | **399.10** |
| **TOTAL** | **269.51** | **115.20** | **93.94** | **32.54** | **104.29** | **103.17** | **79.41** | **70.39** | **82.83** | **951.28** |

*Source: Tables 3A and 4*

### Table 8B - Future 2037 Comparison Goods Expenditure Patterns (£M) - High growth

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **269.51** | **115.20** | **93.94** | **32.54** | **104.29** | **103.17** | **79.41** | **81.59** | | **879.65** |
| Zone 1 - Folkestone | 203.75 | 52.88 | 20.01 | 3.51 | 8.66 | 62.83 | 8.10 | 24.48 | 67.80 | 452.02 |
| Zone 2 - Hythe | 4.04 | 20.16 | 4.23 | 0.59 | 1.56 | 1.65 | 0.48 | 8.16 | 7.21 | 48.08 |
| Zone 3 - New Romney | 0.00 | 0.12 | 9.77 | 1.85 | 0.10 | 0.00 | 0.00 | 0.00 | 2.09 | 13.93 |
| Other in District (Zone 4/6) | 0.27 | 0.00 | 0.00 | 0.75 | 0.00 | 0.62 | 0.08 | 0.00 | 0.30 | 2.02 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 40.79 | 7.20 | 47.99 |
| **District Total** | **208.06** | **73.15** | **34.00** | **6.70** | **10.32** | **65.10** | **8.66** | **73.43** | **84.61** | **564.04** |
| Rest of study area (outside District) | 0.00 | 0.00 | 0.00 | 0.16 | 1.15 | 0.00 | 0.32 | 0.00 | | 1.63 |
| Ashford | 15.09 | 17.17 | 45.56 | 14.32 | 64.55 | 9.90 | 9.61 | 4.08 | | 180.28 |
| Canterbury | 29.65 | 16.93 | 5.82 | 1.37 | 16.27 | 23.83 | 42.41 | 4.08 | | 140.36 |
| Dover | 2.16 | 0.58 | 0.19 | 0.10 | 0.10 | 1.55 | 10.48 | 0.00 | | 15.15 |
| Central London/West End | 2.96 | 1.96 | 1.13 | 0.29 | 1.77 | 0.52 | 1.19 | 0.00 | | 9.82 |
| Hastings | 0.00 | 0.00 | 0.56 | 4.03 | 0.52 | 0.21 | 0.00 | 0.00 | | 5.33 |
| Bluewater/Intu Lakeside | 3.50 | 2.65 | 3.57 | 0.29 | 2.19 | 0.52 | 1.83 | 0.00 | | 14.55 |
| Rye | 0.00 | 0.00 | 0.38 | 2.12 | 0.00 | 0.00 | 0.16 | 0.00 | | 2.65 |
| Maidstone | 1.62 | 0.35 | 1.13 | 0.55 | 1.56 | 0.31 | 0.24 | 0.00 | | 5.76 |
| Other centres | 6.47 | 2.42 | 1.60 | 2.60 | 5.84 | 1.24 | 4.53 | 0.00 | | 24.69 |
| **Outside District Total** | **61.45** | **42.05** | **59.93** | **25.84** | **93.96** | **38.07** | **70.76** | **8.16** | | **400.22** |
| **TOTAL** | **269.51** | **115.20** | **93.94** | **32.54** | **104.29** | **103.17** | **79.41** | **81.59** | **84.61** | **964.26** |

*Source: Tables 3B and 4*

### Table 9A - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - Baseline Growth

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone | 235.79 | 265.28 | 316.17 | 377.09 | 448.06 |
| Zone 2 - Hythe | 21.78 | 24.64 | 30.58 | 37.88 | 46.76 |
| Zone 3 - New Romney | 7.84 | 8.82 | 10.32 | 12.04 | 13.93 |
| Other in District (Zone 4/6) | 1.10 | 1.24 | 1.47 | 1.73 | 2.02 |
| Otterpool Park | 0.00 | 1.33 | 10.37 | 23.25 | 41.40 |
| **Total** | **266.52** | **301.32** | **368.91** | **451.98** | **552.18** |
| **Benchmark Turnover of Existing Facilities** | | | | | |
| Zone 1 - Folkestone | 235.79 | 247.77 | 277.06 | 308.91 | 344.42 |
| Zone 2 - Hythe | 21.78 | 22.89 | 25.60 | 28.54 | 31.82 |
| Zone 3 - New Romney | 7.84 | 8.24 | 9.21 | 10.27 | 11.45 |
| Other in District (Zone 4/6) | 1.10 | 1.16 | 1.29 | 1.44 | 1.61 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **266.52** | **280.05** | **313.16** | **349.16** | **389.30** |
| **Surplus Expenditure (£m)** | | | | | |
| Zone 1 - Folkestone | 0.00 | 17.51 | 39.11 | 68.18 | 103.65 |
| Zone 2 - Hythe | 0.00 | 1.75 | 4.98 | 9.34 | 14.94 |
| Zone 3 - New Romney | 0.00 | 0.58 | 1.11 | 1.77 | 2.48 |
| Other in District (Zone 4/6) | 0.00 | 0.09 | 0.17 | 0.28 | 0.41 |
| Otterpool Park | 0.00 | 1.33 | 10.37 | 23.25 | 41.40 |
| **Total** | **0.00** | **21.26** | **55.74** | **102.82** | **162.88** |

*Source: Tables 5, 6A to 8A*

### Table 9B - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - High Growth

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone | 235.79 | 265.41 | 317.16 | 379.31 | 452.02 |
| Zone 2 - Hythe | 21.78 | 24.69 | 30.91 | 38.62 | 48.08 |
| Zone 3 - New Romney | 7.84 | 8.82 | 10.32 | 12.04 | 13.93 |
| Other in District (Zone 4/6) | 1.10 | 1.24 | 1.47 | 1.73 | 2.02 |
| Otterpool Park | 0.00 | 1.54 | 12.02 | 26.95 | 47.99 |
| **Total** | **266.52** | **301.70** | **371.88** | **458.64** | **564.04** |
| **Benchmark Turnover of Existing Facilities** | | | | | |
| Zone 1 - Folkestone | 235.79 | 247.77 | 277.06 | 308.91 | 344.42 |
| Zone 2 - Hythe | 21.78 | 22.89 | 25.60 | 28.54 | 31.82 |
| Zone 3 - New Romney | 7.84 | 8.24 | 9.21 | 10.27 | 11.45 |
| Other in District (Zone 4/6) | 1.10 | 1.16 | 1.29 | 1.44 | 1.61 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **266.52** | **280.05** | **313.16** | **349.16** | **389.30** |
| **Surplus Expenditure (£m)** | | | | | |
| Zone 1 - Folkestone | 0.00 | 17.64 | 40.10 | 70.40 | 107.60 |
| Zone 2 - Hythe | 0.00 | 1.80 | 5.31 | 10.08 | 16.26 |
| Zone 3 - New Romney | 0.00 | 0.58 | 1.11 | 1.77 | 2.48 |
| Other in District (Zone 4/6) | 0.00 | 0.09 | 0.17 | 0.28 | 0.41 |
| Otterpool Park | 0.00 | 1.54 | 12.02 | 26.95 | 47.99 |
| **Total** | **0.00** | **21.65** | **58.72** | **109.48** | **174.74** |

*Source: Tables 5, 6B to 8B*

**Table 10A - Folkestone & Hythe District Comparison Goods Floorspace Capacity up to 2037 - Baseline Growth**

| | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Turnover Density New Floorspace (£ per sq.m)** | £6,000 | £6,305 | £7,050 | £7,860 | £8,764 |
| **Floorspace Projection (sq.m net)** | | | | | |
| Zone 1 - Folkestone | 0 | 2,777 | 5,548 | 8,673 | 11,826 |
| Zone 2 - Hythe | 0 | 278 | 706 | 1,188 | 1,705 |
| Zone 3 - New Romney | 0 | 92 | 157 | 225 | 283 |
| Other in District (Zone 4/6) | 0 | 14 | 25 | 36 | 47 |
| Otterpool Park | 0 | 211 | 1,471 | 2,958 | 4,724 |
| **Total** | **0** | **3,372** | **7,907** | **13,080** | **18,586** |
| **Floorspace Projection (sq.m gross)** | | | | | |
| Zone 1 - Folkestone | 0 | 3,703 | 7,397 | 11,565 | 15,768 |
| Zone 2 - Hythe | 0 | 371 | 942 | 1,584 | 2,273 |
| Zone 3 - New Romney | 0 | 123 | 210 | 300 | 378 |
| Other in District (Zone 4/6) | 0 | 18 | 33 | 48 | 63 |
| Otterpool Park | 0 | 281 | 1,961 | 3,943 | 6,299 |
| **Total** | **0** | **4,496** | **10,543** | **17,440** | **24,781** |

*Source: Table 9A*

**Table 10B - Folkestone & Hythe District Comparison Goods Floorspace Capacity up to 2037 - High Growth**

| | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Turnover Density New Floorspace (£ per sq.m)** | £6,000 | £6,305 | £7,050 | £7,860 | £8,764 |
| **Floorspace Projection (sq.m net)** | | | | | |
| Zone 1 - Folkestone | 0 | 2,798 | 5,688 | 8,956 | 12,277 |
| Zone 2 - Hythe | 0 | 285 | 753 | 1,282 | 1,855 |
| Zone 3 - New Romney | 0 | 92 | 157 | 225 | 283 |
| Other in District (Zone 4/6) | 0 | 14 | 25 | 36 | 47 |
| Otterpool Park | 0 | 245 | 1,705 | 3,428 | 5,476 |
| **Total** | **0** | **3,434** | **8,329** | **13,928** | **19,939** |
| **Floorspace Projection (sq.m gross)** | | | | | |
| Zone 1 - Folkestone | 0 | 3,731 | 7,584 | 11,941 | 16,370 |
| Zone 2 - Hythe | 0 | 380 | 1,004 | 1,710 | 2,473 |
| Zone 3 - New Romney | 0 | 123 | 210 | 300 | 378 |
| Other in District (Zone 4/6) | 0 | 18 | 33 | 48 | 63 |
| Otterpool Park | 0 | 326 | 2,274 | 4,571 | 7,301 |
| **Total** | **0** | **4,578** | **11,105** | **18,570** | **26,585** |

*Source: Table 9B*

# Appendix 4: Food and beverage capacity

**Table 1A - Study Area Population (Baseline)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 588 | 3,940 | 7,564 | 11,550 |
| **Total** | **130,933** | **134,638** | **139,557** | **144,224** | **148,700** |

*Sources:*

*Experian MMG 3 Population Projections 2016*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 280 dwellings (588 people)*
*2027 = 1,876 dwellings (3,940 people)*
*2032 = 3,602 dwellings (7,564 people)*
*2037 = 5,500 dwellings (11,550 people)*

**Table 1B - Study Area Population (High Growth)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52,642 | 53,670 | 53,808 | 53,928 | 53,934 |
| Zone 2 - Hythe | 18,349 | 18,629 | 18,607 | 18,477 | 18,234 |
| Zone 3 - New Romney & Dymchurch | 16,690 | 17,072 | 17,119 | 17,062 | 16,898 |
| Zone 4 - Lydd | 6,371 | 6,572 | 6,661 | 6,708 | 6,723 |
| Zone 5 - Sellinge & Ashford fringes | 12,457 | 12,991 | 13,709 | 14,277 | 14,799 |
| Zone 6 - Hawkinge, Lyminge & Capel | 14,955 | 15,368 | 15,598 | 15,728 | 15,747 |
| Zone 7 - Rural north and Dover fringes | 9,469 | 9,748 | 10,115 | 10,480 | 10,815 |
| Otterpool Park | 0 | 683 | 4,568 | 8,768 | 13,388 |
| **Total** | **130,933** | **134,733** | **140,185** | **145,428** | **150,538** |

*Sources:*

*Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park*
*Otterpool Park Masterplan phasing - 2.1 people per dwelling*
*2022 = 325 dwellings (683 people)*
*2027 = 2,175 dwellings (4,568 people)*
*2032 = 4,175 dwellings (8,768 people)*
*2037 = 6,375 dwellings (13,388 people)*
*Otterpool Park Masterplan 875 additional dwellings at 2037 over and above Core Strategy (5,500 dwgs)*

**Table 2 - Food and Beverage Expenditure per person per annum (£)**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 1,006 | 1,048 | 1,110 | 1,178 | 1,251 |
| Zone 2 - Hythe | 1,255 | 1,307 | 1,384 | 1,469 | 1,560 |
| Zone 3 - New Romney & Dymchurch | 1,086 | 1,131 | 1,199 | 1,272 | 1,350 |
| Zone 4 - Lydd | 946 | 985 | 1,044 | 1,108 | 1,176 |
| Zone 5 - Sellinge & Ashford fringes | 1,239 | 1,291 | 1,368 | 1,452 | 1,541 |
| Zone 6 - Hawkinge, Lyminge & Capel | 1,199 | 1,249 | 1,323 | 1,405 | 1,491 |
| Zone 7 - Rural north and Dover fringes | 1,294 | 1,347 | 1,427 | 1,515 | 1,608 |
| Otterpool Park | 1,146 | 1,194 | 1,265 | 1,343 | 1,425 |

*Sources:*
*Experian Local Expenditure 2016 (2016 prices)*
*Growth Rates: -0.1% in 2018, 0.8% in 2019, 1.1% from 2020 to 2024 and 1.2% p.a. beyond 2024*

**Table 3A - Total Food and Beverage Expenditure (£m) - Baseline**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52.96 | 56.25 | 59.73 | 63.53 | 67.47 |
| Zone 2 - Hythe | 23.03 | 24.35 | 25.75 | 27.14 | 28.45 |
| Zone 3 - New Romney & Dymchurch | 18.13 | 19.31 | 20.53 | 21.70 | 22.81 |
| Zone 4 - Lydd | 6.03 | 6.47 | 6.95 | 7.43 | 7.91 |
| Zone 5 - Sellinge & Ashford fringes | 15.43 | 16.77 | 18.75 | 20.73 | 22.81 |
| Zone 6 - Hawkinge, Lyminge & Capel | 17.93 | 19.19 | 20.64 | 22.10 | 23.48 |
| Zone 7 - Rural north and Dover fringes | 12.25 | 13.13 | 14.43 | 15.88 | 17.39 |
| Otterpool Park | 0.00 | 0.70 | 4.98 | 10.16 | 16.46 |
| **Study Area Total** | **145.76** | **156.17** | **171.77** | **188.67** | **206.77** |

*Source: Tables 1A and 2*

**Table 3B - Total Food and Beverage Expenditure (£m) - High growth**

| Zone | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| Zone 1 - Folkestone | 52.96 | 56.25 | 59.73 | 63.53 | 67.47 |
| Zone 2 - Hythe | 23.03 | 24.35 | 25.75 | 27.14 | 28.45 |
| Zone 3 - New Romney & Dymchurch | 18.13 | 19.31 | 20.53 | 21.70 | 22.81 |
| Zone 4 - Lydd | 6.03 | 6.47 | 6.95 | 7.43 | 7.91 |
| Zone 5 - Sellinge & Ashford fringes | 15.43 | 16.77 | 18.75 | 20.73 | 22.81 |
| Zone 6 - Hawkinge, Lyminge & Capel | 17.93 | 19.19 | 20.64 | 22.10 | 23.48 |
| Zone 7 - Rural north and Dover fringes | 12.25 | 13.13 | 14.43 | 15.88 | 17.39 |
| Otterpool Park | 0.00 | 0.82 | 5.78 | 11.78 | 19.08 |
| **Study Area Total** | **145.76** | **156.29** | **172.56** | **190.29** | **209.39** |

*Source: Tables 1B and 2*

**Table 4 - Base Year Food/Beverage Market Shares by Zone (%)**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow |
|---|---|---|---|---|---|---|---|---|---|
| Zone 1 - Folkestone | 74.5% | 10.9% | 12.3% | 4.3% | 3.1% | 42.4% | 4.8% | 10.0% | 10.0% |
| Zone 2 - Hythe | 6.0% | 66.5% | 13.8% | 2.8% | 5.6% | 12.1% | 1.9% | 10.0% | 10.0% |
| Zone 3 - New Romney | 0.3% | 0.0% | 38.6% | 13.3% | 0.9% | 0.0% | 0.3% | 0.0% | 10.0% |
| Other in District (Zone 4/6) | 2.3% | 2.5% | 8.7% | 10.3% | 27.8% | 21.8% | 15.1% | 0.0% | 10.0% |
| Otterpool Park | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 70.0% | 10.0% |
| **District Total** | **83.1%** | **79.9%** | **73.4%** | **30.7%** | **37.4%** | **76.3%** | **22.1%** | **90.0%** | **50.0%** |
| Ashford | 5.6% | 5.4% | 16.1% | 24.8% | 41.8% | 2.7% | 6.8% | 5.0% | n/a |
| Canterbury | 5.4% | 7.8% | 1.1% | 2.2% | 6.3% | 15.6% | 42.3% | 5.0% | n/a |
| Rye | 0.0% | 0.3% | 2.5% | 31.9% | 2.2% | 0.0% | 2.7% | 0.0% | n/a |
| Tenterden | 0.0% | 1.8% | 3.3% | 0.4% | 6.9% | 0.0% | 0.3% | 0.0% | n/a |
| Dover | 1.5% | 0.6% | 0.0% | 0.0% | 0.0% | 2.8% | 9.9% | 0.0% | n/a |
| Hastings | 0.0% | 0.0% | 1.3% | 4.2% | 0.0% | 0.0% | 0.0% | 0.0% | n/a |
| Other Outside District | 4.4% | 4.2% | 2.3% | 5.8% | 5.4% | 2.6% | 15.9% | 0.0% | n/a |
| **Outside District Total** | **16.9%** | **20.1%** | **26.6%** | **69.3%** | **62.6%** | **23.7%** | **77.9%** | **10.0%** | n/a |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | |

*Source: NEMS Household Survey August 2018 (weighted results)*

**Table 5 - Base Year 2018 Food and Beverage Expenditure Patterns (£M)**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2018** | **52.96** | **23.03** | **18.13** | **6.03** | **15.43** | **17.93** | **12.25** | **0.00** | | **145.76** |
| Zone 1 - Folkestone | 39.45 | 2.51 | 2.23 | 0.26 | 0.48 | 7.60 | 0.59 | 0.00 | 5.90 | 59.02 |
| Zone 2 - Hythe | 3.18 | 15.31 | 2.50 | 0.17 | 0.86 | 2.17 | 0.23 | 0.00 | 2.71 | 27.14 |
| Zone 3 - New Romney | 0.16 | 0.00 | 7.00 | 0.80 | 0.14 | 0.00 | 0.04 | 0.00 | 0.90 | 9.04 |
| Other in District (Zone 4/6) | 1.22 | 0.58 | 1.58 | 0.62 | 4.29 | 3.91 | 1.85 | 0.00 | 1.56 | 15.60 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **District Total** | **44.01** | **18.40** | **13.30** | **1.85** | **5.77** | **13.68** | **2.71** | **0.00** | **11.08** | **110.80** |
| Ashford | 2.97 | 1.24 | 2.92 | 1.49 | 6.45 | 0.48 | 0.83 | 0.00 | | 16.39 |
| Canterbury | 2.86 | 1.80 | 0.20 | 0.13 | 0.97 | 2.80 | 5.18 | 0.00 | | 13.94 |
| Rye | 0.00 | 0.07 | 0.45 | 1.92 | 0.34 | 0.00 | 0.33 | 0.00 | | 3.12 |
| Tenterden | 0.00 | 0.41 | 0.60 | 0.02 | 1.06 | 0.00 | 0.04 | 0.00 | | 2.14 |
| Dover | 0.79 | 0.14 | 0.00 | 0.00 | 0.00 | 0.50 | 1.21 | 0.00 | | 2.65 |
| Hastings | 0.00 | 0.00 | 0.24 | 0.25 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.49 |
| Other Outside District | 2.33 | 0.97 | 0.42 | 0.35 | 0.83 | 0.47 | 1.95 | 0.00 | | 7.31 |
| **Outside Study Area Total** | **8.95** | **4.63** | **4.82** | **4.18** | **9.66** | **4.25** | **9.54** | **0.00** | | **46.03** |
| **TOTAL** | **52.96** | **23.03** | **18.13** | **6.03** | **15.43** | **17.93** | **12.25** | **0.00** | **11.08** | **156.84** |

*Source: Tables 3A and 4*

**Table 6A - Future 2022 Food/Beverage Expenditure Patterns (£M) - Baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **56.25** | **24.35** | **19.31** | **6.47** | **16.77** | **19.19** | **13.13** | **0.70** | | **156.17** |
| Zone 1 - Folkestone | 41.90 | 2.65 | 2.37 | 0.28 | 0.52 | 8.14 | 0.63 | 0.07 | 6.29 | 62.86 |
| Zone 2 - Hythe | 3.37 | 16.19 | 2.66 | 0.18 | 0.94 | 2.32 | 0.25 | 0.07 | 2.89 | 28.88 |
| Zone 3 - New Romney | 0.17 | 0.00 | 7.45 | 0.86 | 0.15 | 0.00 | 0.04 | 0.00 | 0.96 | 9.64 |
| Other in District (Zone 4/6) | 1.29 | 0.61 | 1.68 | 0.67 | 4.66 | 4.18 | 1.98 | 0.00 | 1.68 | 16.75 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.49 | 0.05 | 0.55 |
| **District Total** | **46.74** | **19.45** | **14.17** | **1.99** | **6.27** | **14.65** | **2.90** | **0.63** | **11.87** | **118.67** |
| Ashford | 3.15 | 1.31 | 3.11 | 1.61 | 7.01 | 0.52 | 0.89 | 0.04 | | 17.64 |
| Canterbury | 3.04 | 1.90 | 0.21 | 0.14 | 1.06 | 2.99 | 5.55 | 0.04 | | 14.93 |
| Rye | 0.00 | 0.07 | 0.48 | 2.07 | 0.37 | 0.00 | 0.35 | 0.00 | | 3.34 |
| Tenterden | 0.00 | 0.44 | 0.64 | 0.03 | 1.16 | 0.00 | 0.04 | 0.00 | | 2.30 |
| Dover | 0.84 | 0.15 | 0.00 | 0.00 | 0.00 | 0.54 | 1.30 | 0.00 | | 2.83 |
| Hastings | 0.00 | 0.00 | 0.25 | 0.27 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.52 |
| Other Outside District | 2.47 | 1.02 | 0.44 | 0.38 | 0.91 | 0.50 | 2.09 | 0.00 | | 7.81 |
| **Outside Study Area Total** | **9.51** | **4.89** | **5.14** | **4.49** | **10.50** | **4.55** | **10.23** | **0.07** | | **49.37** |
| **TOTAL** | **56.25** | **24.35** | **19.31** | **6.47** | **16.77** | **19.19** | **13.13** | **0.70** | **11.87** | **168.04** |

*Source: Tables 3A and 4*

**Table 6B - Future 2022 Food/Beverage Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2022** | **56.25** | **24.35** | **19.31** | **6.47** | **16.77** | **19.19** | **13.13** | **0.82** | | **156.29** |
| Zone 1 - Folkestone | 41.90 | 2.65 | 2.37 | 0.28 | 0.52 | 8.14 | 0.63 | 0.08 | 6.29 | 62.87 |
| Zone 2 - Hythe | 3.37 | 16.19 | 2.66 | 0.18 | 0.94 | 2.32 | 0.25 | 0.08 | 2.89 | 28.89 |
| Zone 3 - New Romney | 0.17 | 0.00 | 7.45 | 0.86 | 0.15 | 0.00 | 0.04 | 0.00 | 0.96 | 9.64 |
| Other in District (Zone 4/6) | 1.29 | 0.61 | 1.68 | 0.67 | 4.66 | 4.18 | 1.98 | 0.00 | 1.68 | 16.75 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.57 | 0.06 | 0.63 |
| **District Total** | **46.74** | **19.45** | **14.17** | **1.99** | **6.27** | **14.65** | **2.90** | **0.73** | **11.88** | **118.79** |
| Ashford | 3.15 | 1.31 | 3.11 | 1.61 | 7.01 | 0.52 | 0.89 | 0.04 | | 17.64 |
| Canterbury | 3.04 | 1.90 | 0.21 | 0.14 | 1.06 | 2.99 | 5.55 | 0.04 | | 14.94 |
| Rye | 0.00 | 0.07 | 0.48 | 2.07 | 0.37 | 0.00 | 0.35 | 0.00 | | 3.34 |
| Tenterden | 0.00 | 0.44 | 0.64 | 0.03 | 1.16 | 0.00 | 0.04 | 0.00 | | 2.30 |
| Dover | 0.84 | 0.15 | 0.00 | 0.00 | 0.00 | 0.54 | 1.30 | 0.00 | | 2.83 |
| Hastings | 0.00 | 0.00 | 0.25 | 0.27 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.52 |
| Other Outside District | 2.47 | 1.02 | 0.44 | 0.38 | 0.91 | 0.50 | 2.09 | 0.00 | | 7.81 |
| **Outside Study Area Total** | **9.51** | **4.89** | **5.14** | **4.49** | **10.50** | **4.55** | **10.23** | **0.08** | | **49.38** |
| **TOTAL** | **56.25** | **24.35** | **19.31** | **6.47** | **16.77** | **19.19** | **13.13** | **0.82** | **11.88** | **168.17** |

*Source: Tables 3A and 4*

**Table 7A - Future 2027 Food/Beverage Expenditure Patterns (£M) - Baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **59.73** | **25.75** | **20.53** | **6.95** | **18.75** | **20.64** | **14.43** | **4.98** | | **171.77** |
| Zone 1 - Folkestone | 44.50 | 2.81 | 2.52 | 0.30 | 0.58 | 8.75 | 0.69 | 0.50 | 6.74 | 67.39 |
| Zone 2 - Hythe | 3.58 | 17.13 | 2.83 | 0.19 | 1.05 | 2.50 | 0.27 | 0.50 | 3.12 | 31.17 |
| Zone 3 - New Romney | 0.18 | 0.00 | 7.92 | 0.92 | 0.17 | 0.00 | 0.04 | 0.00 | 1.03 | 10.27 |
| Other in District (Zone 4/6) | 1.37 | 0.64 | 1.79 | 0.72 | 5.21 | 4.50 | 2.18 | 0.00 | 1.82 | 18.23 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 3.49 | 0.39 | 3.88 |
| **District Total** | **49.63** | **20.58** | **15.07** | **2.13** | **7.01** | **15.75** | **3.19** | **4.49** | **13.09** | **130.94** |
| Ashford | 3.34 | 1.39 | 3.30 | 1.72 | 7.84 | 0.56 | 0.98 | 0.25 | | 19.39 |
| Canterbury | 3.23 | 2.01 | 0.23 | 0.15 | 1.18 | 3.22 | 6.11 | 0.25 | | 16.37 |
| Rye | 0.00 | 0.08 | 0.51 | 2.22 | 0.41 | 0.00 | 0.39 | 0.00 | | 3.61 |
| Tenterden | 0.00 | 0.46 | 0.68 | 0.03 | 1.29 | 0.00 | 0.04 | 0.00 | | 2.51 |
| Dover | 0.90 | 0.15 | 0.00 | 0.00 | 0.00 | 0.58 | 1.43 | 0.00 | | 3.06 |
| Hastings | 0.00 | 0.00 | 0.27 | 0.29 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.56 |
| Other Outside District | 2.63 | 1.08 | 0.47 | 0.40 | 1.01 | 0.54 | 2.30 | 0.00 | | 8.43 |
| **Outside Study Area Total** | **10.09** | **5.18** | **5.46** | **4.82** | **11.74** | **4.89** | **11.24** | **0.50** | | **53.92** |
| **TOTAL** | **59.73** | **25.75** | **20.53** | **6.95** | **18.75** | **20.64** | **14.43** | **4.98** | **13.09** | **184.86** |

*Source: Tables 3A and 4*

**Table 7B - Future 2027 Food/Beverage Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2027** | **59.73** | **25.75** | **20.53** | **6.95** | **18.75** | **20.64** | **14.43** | **5.78** | | **172.56** |
| Zone 1 - Folkestone | 44.50 | 2.81 | 2.52 | 0.30 | 0.58 | 8.75 | 0.69 | 0.58 | 6.75 | 67.48 |
| Zone 2 - Hythe | 3.58 | 17.13 | 2.83 | 0.19 | 1.05 | 2.50 | 0.27 | 0.58 | 3.13 | 31.26 |
| Zone 3 - New Romney | 0.18 | 0.00 | 7.92 | 0.92 | 0.17 | 0.00 | 0.04 | 0.00 | 1.03 | 10.27 |
| Other in District (Zone 4/6) | 1.37 | 0.64 | 1.79 | 0.72 | 5.21 | 4.50 | 2.18 | 0.00 | 1.82 | 18.23 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 4.04 | 0.45 | 4.49 |
| **District Total** | **49.63** | **20.58** | **15.07** | **2.13** | **7.01** | **15.75** | **3.19** | **5.20** | **13.17** | **131.73** |
| Ashford | 3.34 | 1.39 | 3.30 | 1.72 | 7.84 | 0.56 | 0.98 | 0.29 | | 19.43 |
| Canterbury | 3.23 | 2.01 | 0.23 | 0.15 | 1.18 | 3.22 | 6.11 | 0.29 | | 16.41 |
| Rye | 0.00 | 0.08 | 0.51 | 2.22 | 0.41 | 0.00 | 0.39 | 0.00 | | 3.61 |
| Tenterden | 0.00 | 0.46 | 0.68 | 0.03 | 1.29 | 0.00 | 0.04 | 0.00 | | 2.51 |
| Dover | 0.90 | 0.15 | 0.00 | 0.00 | 0.00 | 0.58 | 1.43 | 0.00 | | 3.06 |
| Hastings | 0.00 | 0.00 | 0.27 | 0.29 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.56 |
| Other Outside District | 2.63 | 1.08 | 0.47 | 0.40 | 1.01 | 0.54 | 2.30 | 0.00 | | 8.43 |
| **Outside Study Area Total** | **10.09** | **5.18** | **5.46** | **4.82** | **11.74** | **4.89** | **11.24** | **0.58** | | **54.00** |
| **TOTAL** | **59.73** | **25.75** | **20.53** | **6.95** | **18.75** | **20.64** | **14.43** | **5.78** | **13.17** | **185.73** |

*Source: Tables 3A and 4*

**Table 8A - Future 2032 Food/Beverage Expenditure Patterns (£M) - Baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **63.53** | **27.14** | **21.70** | **7.43** | **20.73** | **22.10** | **15.88** | **10.16** | | **188.67** |
| Zone 1 - Folkestone | 47.33 | 2.96 | 2.67 | 0.32 | 0.64 | 9.37 | 0.76 | 1.02 | 7.23 | 72.29 |
| Zone 2 - Hythe | 3.81 | 18.05 | 2.99 | 0.21 | 1.16 | 2.67 | 0.30 | 1.02 | 3.36 | 33.57 |
| Zone 3 - New Romney | 0.19 | 0.00 | 8.38 | 0.99 | 0.19 | 0.00 | 0.05 | 0.00 | 1.09 | 10.88 |
| Other in District (Zone 4/6) | 1.46 | 0.68 | 1.89 | 0.77 | 5.76 | 4.82 | 2.40 | 0.00 | 1.97 | 19.75 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 7.11 | 0.79 | 7.90 |
| **District Total** | **52.79** | **21.69** | **15.93** | **2.28** | **7.75** | **16.86** | **3.51** | **9.14** | **14.44** | **144.39** |
| Ashford | 3.56 | 1.47 | 3.49 | 1.84 | 8.67 | 0.60 | 1.08 | 0.51 | | 21.21 |
| Canterbury | 3.43 | 2.12 | 0.24 | 0.16 | 1.31 | 3.45 | 6.72 | 0.51 | | 17.93 |
| Rye | 0.00 | 0.08 | 0.54 | 2.37 | 0.46 | 0.00 | 0.43 | 0.00 | | 3.88 |
| Tenterden | 0.00 | 0.49 | 0.72 | 0.03 | 1.43 | 0.00 | 0.05 | 0.00 | | 2.71 |
| Dover | 0.95 | 0.16 | 0.00 | 0.00 | 0.00 | 0.62 | 1.57 | 0.00 | | 3.31 |
| Hastings | 0.00 | 0.00 | 0.28 | 0.31 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.59 |
| Other Outside District | 2.80 | 1.14 | 0.50 | 0.43 | 1.12 | 0.57 | 2.52 | 0.00 | | 9.08 |
| **Outside Study Area Total** | **10.74** | **5.46** | **5.77** | **5.15** | **12.98** | **5.24** | **12.37** | **1.02** | | **58.71** |
| **TOTAL** | **63.53** | **27.14** | **21.70** | **7.43** | **20.73** | **22.10** | **15.88** | **10.16** | **14.44** | **203.11** |

*Source: Tables 3A and 4*

**Table 8B - Future 2032 Food/Beverage Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2032** | **63.53** | **27.14** | **21.70** | **7.43** | **20.73** | **22.10** | **15.88** | **11.78** | | **190.29** |
| Zone 1 - Folkestone | 47.33 | 2.96 | 2.67 | 0.32 | 0.64 | 9.37 | 0.76 | 1.18 | 7.25 | 72.47 |
| Zone 2 - Hythe | 3.81 | 18.05 | 2.99 | 0.21 | 1.16 | 2.67 | 0.30 | 1.18 | 3.38 | 33.75 |
| Zone 3 - New Romney | 0.19 | 0.00 | 8.38 | 0.99 | 0.19 | 0.00 | 0.05 | 0.00 | 1.09 | 10.88 |
| Other in District (Zone 4/6) | 1.46 | 0.68 | 1.89 | 0.77 | 5.76 | 4.82 | 2.40 | 0.00 | 1.97 | 19.75 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.24 | 0.92 | 9.16 |
| **District Total** | **52.79** | **21.69** | **15.93** | **2.28** | **7.75** | **16.86** | **3.51** | **10.60** | **14.60** | **146.01** |
| Ashford | 3.56 | 1.47 | 3.49 | 1.84 | 8.67 | 0.60 | 1.08 | 0.59 | | 21.29 |
| Canterbury | 3.43 | 2.12 | 0.24 | 0.16 | 1.31 | 3.45 | 6.72 | 0.59 | | 18.01 |
| Rye | 0.00 | 0.08 | 0.54 | 2.37 | 0.46 | 0.00 | 0.43 | 0.00 | | 3.88 |
| Tenterden | 0.00 | 0.49 | 0.72 | 0.03 | 1.43 | 0.00 | 0.05 | 0.00 | | 2.71 |
| Dover | 0.95 | 0.16 | 0.00 | 0.00 | 0.00 | 0.62 | 1.57 | 0.00 | | 3.31 |
| Hastings | 0.00 | 0.00 | 0.28 | 0.31 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.59 |
| Other Outside District | 2.80 | 1.14 | 0.50 | 0.43 | 1.12 | 0.57 | 2.52 | 0.00 | | 9.08 |
| **Outside Study Area Total** | **10.74** | **5.46** | **5.77** | **5.15** | **12.98** | **5.24** | **12.37** | **1.18** | | **58.88** |
| **TOTAL** | **63.53** | **27.14** | **21.70** | **7.43** | **20.73** | **22.10** | **15.88** | **11.78** | **14.60** | **204.89** |

*Source: Tables 3A and 4*

**Table 9A - Future 2037 Food/Beverage Expenditure Patterns (£M) - Baseline growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **67.47** | **28.45** | **22.81** | **7.91** | **22.81** | **23.48** | **17.39** | **16.46** | | **206.77** |
| Zone 1 - Folkestone | 50.27 | 3.10 | 2.81 | 0.34 | 0.71 | 9.96 | 0.83 | 1.65 | 7.74 | 77.39 |
| Zone 2 - Hythe | 4.05 | 18.92 | 3.15 | 0.22 | 1.28 | 2.84 | 0.33 | 1.65 | 3.60 | 36.03 |
| Zone 3 - New Romney | 0.20 | 0.00 | 8.81 | 1.05 | 0.21 | 0.00 | 0.05 | 0.00 | 1.15 | 11.46 |
| Other in District (Zone 4/6) | 1.55 | 0.71 | 1.98 | 0.81 | 6.34 | 5.12 | 2.63 | 0.00 | 2.13 | 21.27 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 11.52 | 1.28 | 12.80 |
| **District Total** | **56.07** | **22.73** | **16.74** | **2.43** | **8.53** | **17.91** | **3.84** | **14.81** | **15.90** | **158.96** |
| Ashford | 3.78 | 1.54 | 3.67 | 1.96 | 9.53 | 0.63 | 1.18 | 0.82 | | 23.12 |
| Canterbury | 3.64 | 2.22 | 0.25 | 0.17 | 1.44 | 3.66 | 7.36 | 0.82 | | 19.57 |
| Rye | 0.00 | 0.09 | 0.57 | 2.52 | 0.50 | 0.00 | 0.47 | 0.00 | | 4.15 |
| Tenterden | 0.00 | 0.51 | 0.75 | 0.03 | 1.57 | 0.00 | 0.05 | 0.00 | | 2.92 |
| Dover | 1.01 | 0.17 | 0.00 | 0.00 | 0.00 | 0.66 | 1.72 | 0.00 | | 3.56 |
| Hastings | 0.00 | 0.00 | 0.30 | 0.33 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.63 |
| Other Outside District | 2.97 | 1.19 | 0.52 | 0.46 | 1.23 | 0.61 | 2.77 | 0.00 | | 9.75 |
| **Outside Study Area Total** | **11.40** | **5.72** | **6.07** | **5.48** | **14.28** | **5.56** | **13.55** | **1.65** | | **63.70** |
| **TOTAL** | **67.47** | **28.45** | **22.81** | **7.91** | **22.81** | **23.48** | **17.39** | **16.46** | **15.90** | **222.66** |

*Source: Tables 3A and 4*

**Table 9B - Future 2037 Food/Beverage Expenditure Patterns (£M) - High growth**

| Location | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Otterpool Park | Inflow | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| **Expenditure 2037** | **67.47** | **28.45** | **22.81** | **7.91** | **22.81** | **23.48** | **17.39** | **19.08** | | **209.39** |
| Zone 1 - Folkestone | 50.27 | 3.10 | 2.81 | 0.34 | 0.71 | 9.96 | 0.83 | 1.91 | 7.77 | 77.69 |
| Zone 2 - Hythe | 4.05 | 18.92 | 3.15 | 0.22 | 1.28 | 2.84 | 0.33 | 1.91 | 3.63 | 36.32 |
| Zone 3 - New Romney | 0.20 | 0.00 | 8.81 | 1.05 | 0.21 | 0.00 | 0.05 | 0.00 | 1.15 | 11.46 |
| Other in District (Zone 4/6) | 1.55 | 0.71 | 1.98 | 0.81 | 6.34 | 5.12 | 2.63 | 0.00 | 2.13 | 21.27 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 13.35 | 1.48 | 14.84 |
| **District Total** | **56.07** | **22.73** | **16.74** | **2.43** | **8.53** | **17.91** | **3.84** | **17.17** | **16.16** | **161.58** |
| Ashford | 3.78 | 1.54 | 3.67 | 1.96 | 9.53 | 0.63 | 1.18 | 0.95 | | 23.25 |
| Canterbury | 3.64 | 2.22 | 0.25 | 0.17 | 1.44 | 3.66 | 7.36 | 0.95 | | 19.70 |
| Rye | 0.00 | 0.09 | 0.57 | 2.52 | 0.50 | 0.00 | 0.47 | 0.00 | | 4.15 |
| Tenterden | 0.00 | 0.51 | 0.75 | 0.03 | 1.57 | 0.00 | 0.05 | 0.00 | | 2.92 |
| Dover | 1.01 | 0.17 | 0.00 | 0.00 | 0.00 | 0.66 | 1.72 | 0.00 | | 3.56 |
| Hastings | 0.00 | 0.00 | 0.30 | 0.33 | 0.00 | 0.00 | 0.00 | 0.00 | | 0.63 |
| Other Outside District | 2.97 | 1.19 | 0.52 | 0.46 | 1.23 | 0.61 | 2.77 | 0.00 | | 9.75 |
| **Outside Study Area Total** | **11.40** | **5.72** | **6.07** | **5.48** | **14.28** | **5.56** | **13.55** | **1.91** | | **63.96** |
| **TOTAL** | **67.47** | **28.45** | **22.81** | **7.91** | **22.81** | **23.48** | **17.39** | **19.08** | **16.16** | **225.55** |

*Source: Tables 3A and 4*

**Table 10A - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - Baseline growth**

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone | 59.02 | 62.86 | 67.39 | 72.29 | 77.39 |
| Zone 2 - Hythe | 27.14 | 28.88 | 31.17 | 33.57 | 36.03 |
| Zone 3 - New Romney | 9.04 | 9.64 | 10.27 | 10.88 | 11.46 |
| Other in District (Zone 4/6) | 15.60 | 16.75 | 18.23 | 19.75 | 21.27 |
| Otterpool Park | 0.00 | 0.55 | 3.88 | 7.90 | 12.80 |
| **Total** | **110.80** | **118.67** | **130.94** | **144.39** | **158.96** |
| **Benchmark turnover of existing facilities** | | | | | |
| Zone 1 - Folkestone | 59.02 | 61.42 | 64.55 | 67.85 | 71.31 |
| Zone 2 - Hythe | 27.14 | 28.24 | 29.68 | 31.20 | 32.79 |
| Zone 3 - New Romney | 9.04 | 9.40 | 9.88 | 10.39 | 10.92 |
| Other in District (Zone 4/6) | 15.60 | 16.23 | 17.06 | 17.93 | 18.85 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **110.80** | **115.30** | **121.18** | **127.37** | **133.86** |

*Source: Table 5, 6A to 9A*

**Table 10B - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - High growth**

| Area | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Available Expenditure** | | | | | |
| Zone 1 - Folkestone | 59.02 | 62.87 | 67.48 | 72.47 | 77.69 |
| Zone 2 - Hythe | 27.14 | 28.89 | 31.26 | 33.75 | 36.32 |
| Zone 3 - New Romney | 9.04 | 9.64 | 10.27 | 10.88 | 11.46 |
| Other in District (Zone 4/6) | 15.60 | 16.75 | 18.23 | 19.75 | 21.27 |
| Otterpool Park | 0.00 | 0.63 | 4.49 | 9.16 | 14.84 |
| **Total** | **110.80** | **118.79** | **131.73** | **146.01** | **161.58** |
| **Benchmark turnover of existing facilities** | | | | | |
| Zone 1 - Folkestone | 59.02 | 61.42 | 64.55 | 67.85 | 71.31 |
| Zone 2 - Hythe | 27.14 | 28.24 | 29.68 | 31.20 | 32.79 |
| Zone 3 - New Romney | 9.04 | 9.40 | 9.88 | 10.39 | 10.92 |
| Other in District (Zone 4/6) | 15.60 | 16.23 | 17.06 | 17.93 | 18.85 |
| Otterpool Park | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **Total** | **110.80** | **115.30** | **121.18** | **127.37** | **133.86** |

*Source: Table 5, 6B to 9B*

**Table 11A - Food and Beverage Floorspace Capacity up to 2037 - Baseline growth**

| | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Surplus/Deficit Expenditure (£m)** | | | | | |
| Zone 1 - Folkestone | 0.00 | 1.43 | 2.83 | 4.45 | 6.09 |
| Zone 2 - Hythe | 0.00 | 0.64 | 1.49 | 2.38 | 3.24 |
| Zone 3 - New Romney | 0.00 | 0.23 | 0.38 | 0.49 | 0.55 |
| Other in District (Zone 4/6) | 0.00 | 0.52 | 1.17 | 1.81 | 2.43 |
| Otterpool Park | 0.00 | 0.55 | 3.88 | 7.90 | 12.80 |
| **TOTAL** | **0.00** | **3.37** | **9.75** | **17.03** | **25.10** |
| **Turnover Density New Floorspace (£ per sq.m)** | £5,000 | £5,203 | £5,468 | £5,747 | £6,041 |
| **Floorspace Projection (sq.m gross)** | | | | | |
| Zone 1 - Folkestone | 0 | 276 | 518 | 774 | 1,008 |
| Zone 2 - Hythe | 0 | 123 | 272 | 413 | 536 |
| Zone 3 - New Romney | 0 | 45 | 70 | 86 | 90 |
| Other in District (Zone 4/6) | 0 | 100 | 214 | 315 | 402 |
| Otterpool Park | 0 | 105 | 709 | 1,375 | 2,119 |
| **TOTAL** | **0** | **648** | **1,784** | **2,963** | **4,155** |

*Source: Table 10A*

**Table 11B - Food and Beverage Floorspace Capacity up to 2037 - High growth**

| | 2018 | 2022 | 2027 | 2032 | 2037 |
|---|---|---|---|---|---|
| **Surplus/Deficit Expenditure (£m)** | | | | | |
| Zone 1 - Folkestone | 0.00 | 1.45 | 2.92 | 4.63 | 6.38 |
| Zone 2 - Hythe | 0.00 | 0.65 | 1.58 | 2.55 | 3.53 |
| Zone 3 - New Romney | 0.00 | 0.23 | 0.38 | 0.49 | 0.55 |
| Other in District (Zone 4/6) | 0.00 | 0.52 | 1.17 | 1.81 | 2.43 |
| Otterpool Park | 0.00 | 0.63 | 4.49 | 9.16 | 14.84 |
| **TOTAL** | **0.00** | **3.48** | **10.55** | **18.65** | **27.72** |
| **Turnover Density New Floorspace (£ per sq.m)** | £5,000 | £5,203 | £5,468 | £5,747 | £6,041 |
| **Floorspace Projection (sq.m gross)** | | | | | |
| Zone 1 - Folkestone | 0 | 278 | 535 | 805 | 1,056 |
| Zone 2 - Hythe | 0 | 125 | 288 | 445 | 585 |
| Zone 3 - New Romney | 0 | 45 | 70 | 86 | 90 |
| Other in District (Zone 4/6) | 0 | 100 | 214 | 315 | 402 |
| Otterpool Park | 0 | 122 | 822 | 1,594 | 2,456 |
| **TOTAL** | **0** | **670** | **1,929** | **3,244** | **4,589** |

*Source: Table 10B*

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