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Folkestone & Hythe Retail and Leisure Need Assessment

2018 Update

Folkestone & Hythe District Council

Amended June 2019

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 2018) 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 (February 2019) 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 – change underlined) 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 (or expected to become available within a reasonable period) 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.

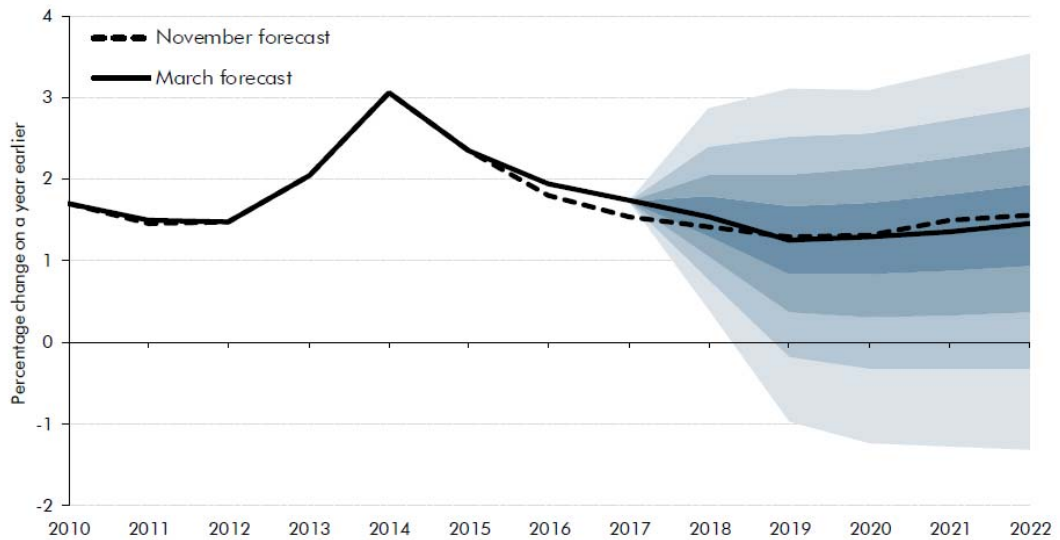
Retail trends

- 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, Boots 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 2018) anticipate limited growth (0.1% per annum) from 2020. For comparison goods, higher levels of growth are expected in the future (3.3% per annum from 2021), 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.
- 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 16 (December 2018) 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 20% 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 17% in 2017, against a little below 5% 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 December 2017, were an estimated 63.1 million internet users in the UK (representing 94.7% 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 23% by 2022 rising to 27% 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 to 1D 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 (upper delivery rate) suggests 6,375 homes could be completed by 2037, i.e. 875 more than that envisaged in the Core Strategy. The following population growth scenarios have been adopted.

- **Scenario 1** in Table 1A sets 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 and assuming 2.1 people per dwelling).
- **Scenario 2** in Table 1B assumes a faster completion rate at Otterpool Park, based on the maximum provision of 6,375 dwellings by 2037 (as outlined in the Otterpool Park Masterplan and assuming 2.1 people per dwelling).
- **Scenario 3** in Table 1C assumes the minimum number of dwellings at Otterpool Park (5,500 homes as outlined in the Core Strategy) but a higher density of 2.8 people per dwelling.

- **Scenario 4** in Table 1D assumes the maximum number of dwelling at Otterpool Park (6,375 dwellings by 2037) and the higher density of 2.8 people per dwelling.

3.6 For the baseline scenario 1, 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)

3.7 In the higher growth scenario 2, 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)

3.8 The scenario 1 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).

3.9 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.

3.10 Based on the scenario 1 population projections outlined above and growth in per capita spending, convenience goods spending within the study area is forecast to increase by 14.3% from £304.63 million in 2018 to £348.11 million in 2037, as shown in Table 3A (Appendix 2). Comparison goods spending is forecast to increase by 95.5% between 2018 and 2037, increasing from £448.33 million in 2018 to £876.36 million in 2037, as shown in Table 3A (Appendix 3). Food and beverage spending is forecast to increase by 43% between 2018 and 2037, increasing from £145.91 million in 2018 to £208.63 million in 2037, as shown in Table 3A (Appendix 4).

3.11 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

- 3.12 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

- 3.13 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.
- 3.14 The level of convenience goods expenditure attracted to shops/stores in Folkestone & Hythe in 2018 is estimated to be £261.13 million as shown in Table 5, Appendix 2. The total benchmark turnover of the existing convenience sales floorspace within Folkestone & Hythe District is £255.86 million at 2016 (Table 10, Appendix 2). These figures suggest that collectively convenience retail facilities in the District are trading 2% above the average benchmark turnover, although there are variations within the District.
- 3.15 Existing convenience goods shopping provision appears to be trading 9.9% below benchmark in Zone 1 (Folkestone/Cheriton), but in other parts of the District facilities are trading 29% above benchmark.

Comparison shopping

- 3.16 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.
- 3.17 The estimated comparison goods expenditure currently attracted by shopping facilities within Folkestone & Hythe District is £274.7 million in 2018, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

Food and beverage

- 3.18 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.
- 3.19 The estimated food and beverage expenditure currently attracted by facilities within Folkestone & Hythe District is £110.92 million in 2018, as shown in Table 5, Appendix 4.

Otterpool Park

- 3.20 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.
- 3.21 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.
- 3.22 The emerging Otterpool Park Masterplan suggests that up to 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).
- 3.23 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.

3.24 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%

3.25 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. Folkstone and Hythe, recognising there will be cross-flows of expenditure.

Capacity for convenience goods floorspace

3.26 The future levels of available convenience goods expenditure in 2022, 2027, 2032 and 2037 for each growth scenario are shown at Tables 6A to 9D in Appendix 2. The scenario 1 baseline total level of convenience goods expenditure available for shops in the District between 2018 and 2037 is summarised in Tables 11A to 11D (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £261.13 million in 2018 to £299.55 million in 2037.

3.27 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 surplus of £5.27 million convenience goods expenditure in 2018. By 2022, the surplus of available expenditure increases to £8.25 million. Continued expenditure growth increases the expenditure surplus to £16.93 million by 2027, £27.56 million by 2032 and £38.27 million by 2037.

3.28 The 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 at 2018, 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) – Scenario 1

	By 2022	By 2027	By 2032	By 2037
Zone 1 - Folkestone/Cheriton	-2,022	-1,993	-1,840	-1,734
Zone 2 - Hythe	1,161	1,332	1,539	1,733
Zone 3 - New Romney	1,441	1,434	1,433	1,420
Other in District (Zone 4/6)	261	287	316	338
Otterpool Park	142	943	1,813	2,772
District Total	982	2,003	3,261	4,529

Source: Table 12A, Appendix 2

3.29 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 Folkstone, Hythe and other parts of the District.

Capacity for comparison goods floorspace

- 3.30 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 for each growth scenario has been projected forward to 2022, 2027, 2032 and 2037, as shown in Tables 6A to 8D in Appendix 3 and summarised in Tables 9A to 9D. Available comparison expenditure to facilities within the District is expected to increase from £274.7 million in 2018 to £557.22 million in 2037.
- 3.31 Table 9A assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rates have been adopted as recommended in Experian Retail Briefing Note 16. This growth will help to maintain the health and viability of town centres.
- 3.32 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Tables 10A to 10D in Appendix 3, adopting average sales densities in 2018 of £6,000 per sq.m, which is projected to grow in the future due to improved turnover efficiency. The surplus expenditure at 2037 could support 13,169 sq.m net of comparison sales floorspace (17,558 sq.m gross). The broken down floorspace projections for scenario 1 are summarised in Table 3.2 below.

Table 3.2 Comparison Floorspace Projections (sq.m gross) – Scenario 1

	By 2022	By 2027	By 2032	By 2037
Zone 1 - Folkestone/Cheriton	840	2,651	6,137	9,775
Zone 2 - Hythe	106	490	1,053	1,666
Zone 3 - New Romney	28	54	124	188
Other in District (Zone 4/6)	5	11	23	35
Otterpool Park	275	1,858	3,708	5,893
District Total	1,253	5,064	11,045	17,558

Source: Table 11A, Appendix 3

- 3.33 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

- 3.34 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 is projected forward to 2022, 2027, 2032 and 2037 for each growth scenario, as shown in Tables 6A to 9D in Appendix 4 and summarised in Tables 10A to 10D. Available food and beverage expenditure to facilities within the District is expected to increase from £110.92 million in 2018 to £160.39 million in 2037.
- 3.35 Tables 10A to 10D assume 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 in Table 11A to 11D 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 scenario 1 surplus expenditure at 2037 could support 4,368 sq.m gross food and beverage floorspace. The scenario 1 floorspace projections are summarised in Table 3.3 below.

Table 3.3 Food and Beverage Floorspace Projections (sq.m gross) – Scenario 1

	By 2022	By 2027	By 2032	By 2037
Zone 1 - Folkestone/Cheriton	345	617	877	1,109
Zone 2 - Hythe	156	319	463	585
Zone 3 - New Romney	45	84	102	106
Other in District (Zone 4/6)	118	240	342	430
Otterpool Park	106	715	1,387	2,139
District Total	781	1,975	3,171	4,368

Source: Table 11A, Appendix 4

- 3.36 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 similar to the scenario 1 figure suggested in this update.

Capacity at Otterpool Park

- 3.37 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 Scenario 1

	By 2022	By 2027	By 2032	By 2037
Class A1 convenience	142	943	1,813	2,772
Class A1 comparison	275	1,858	3,708	5,893
Class A3 to A5 food/beverage	106	715	1,387	2,139
Total	523	3,516	6,908	10,804

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

Table 3.5 Otterpool Park Floorspace Projections (sq.m gross) – Scenario 2

	By 2022	By 2027	By 2032	By 2037
Class A1 convenience	165	1,094	2,101	3,213
Class A1 comparison	319	2,155	4,298	6,831
Class A3 to A5 food/beverage	123	829	1,608	2,479
Total	607	4,078	8,007	12,523

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

Table 3.6 Otterpool Park Floorspace Projections (sq.m gross) – Scenario 3

	By 2022	By 2027	By 2032	By 2037
Class A1 convenience	189	1,258	2,417	3,696
Class A1 comparison	366	2,478	4,944	7,858
Class A3 to A5 food/beverage	141	953	1,849	2,851
Total	696	4,689	9,210	14,405

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

Table 3.7 Otterpool Park Floorspace Projections (sq.m gross) – Scenario 4

	By 2022	By 2027	By 2032	By 2037
Class A1 convenience	219	1,458	2,801	4,284
Class A1 comparison	425	2,872	5,731	9,108
Class A3 to A5 food/beverage	164	1,105	2,144	3,305
Total	808	5,435	10,676	16,697

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

- 3.38 These projections suggest the new town and local centres within the new Otterpool Park settlement could provide between 10,800 to 16,700 sq.m gross of retail and food/beverage floorspace by 2037.
- 3.39 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 13,000 to 20,000 sq.m gross (Class A1 to A5) by 2037.
- 3.40 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 identifies 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 (between 148,700 to 155,000) would generate demand for 9-10 cinema screens or 1,841-1,919 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 maximum study area population at 2037 (Scenario 4) generates up to 77,500 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 to around 117,800 in 2037 based on the scenario 4 growth) could support 813 fitness stations, based on the local average (6.9 stations per 1,000). These figures suggest there could be scope for up to 3 medium sized (40 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 (highest growth scenario 4) could support 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 people¹) 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 up to 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 baseline (Scenario 1) retail capacity projections suggest there is scope for at least 26,400 sq.m gross Class A1 retail and food/beverage floorspace in Folkestone & Hythe District by 2037. The projections suggest at least 40% of this floorspace requirement could be accommodated at the new Garden Settlement at Otterpool Park.

5.4 The baseline scenario 1 floorspace projections for the District, up to 2037 are summarised in Table 5.1 below.

Table 5.1 Floorspace Projections Summary (sq.m gross) – Scenario 1

	By 2022	By 2027	By 2032	By 2037
Class A1 - convenience	982	2,003	3,261	4,529
Class A1 - comparison	1,253	5,064	11,045	17,558
Class A3 to A5 – food/beverage	781	1,975	3,171	4,368
District Total	3,016	9,042	17,477	26,455

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
- up to 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.

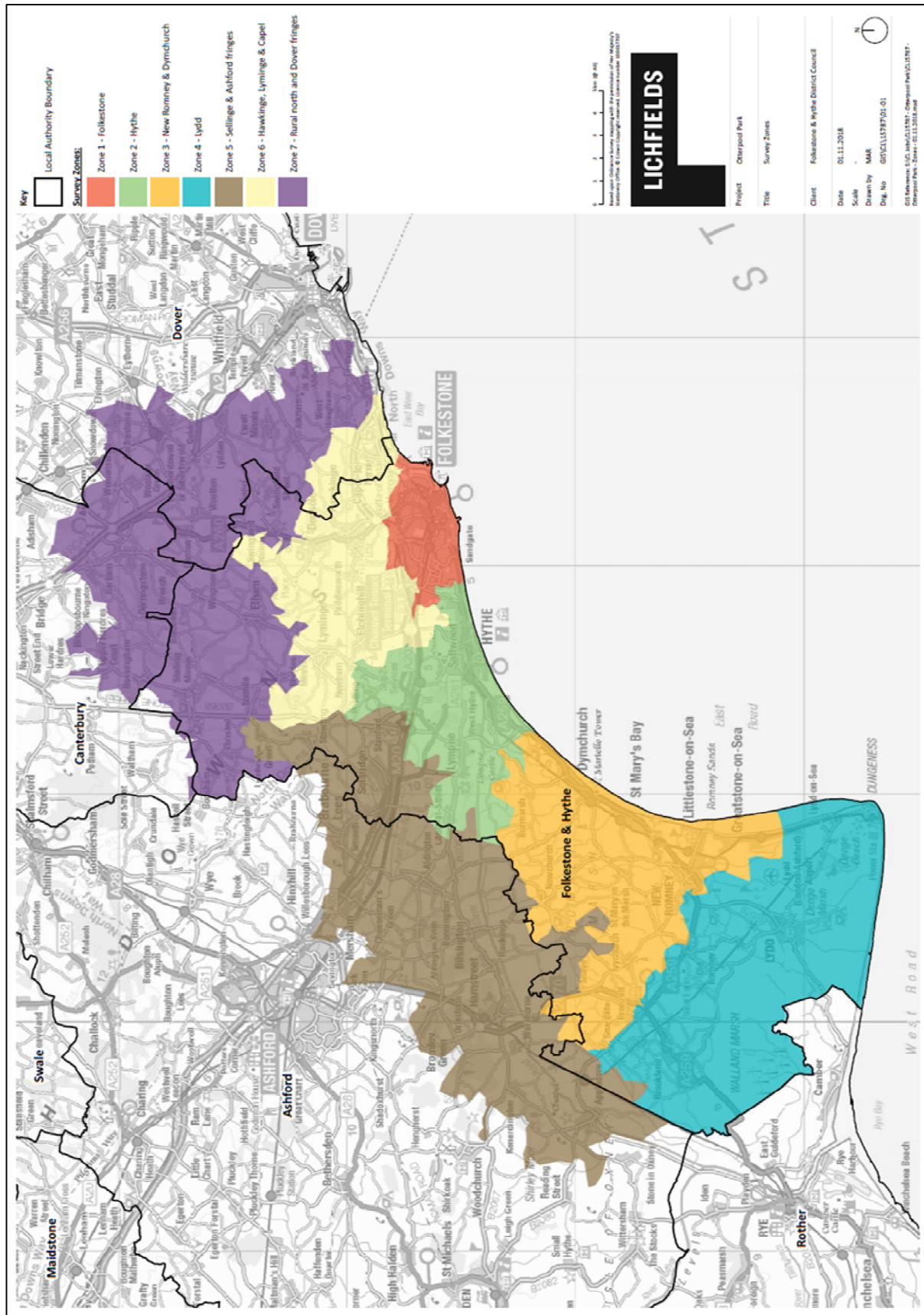
5.7 Retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.

- 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 10,800 to 16,700 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 13,000 to 20,000 sq.m gross (Class A1 to A5) by 2037. The scale of provision will depend on the number or dwellings proposed and the average people per dwelling.
- 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



Retail Capacity Assessment – Methodology and Data

Price Base

All monetary values expressed in this study are at 2016 prices.

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 16) 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 2020 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 1.3% for 2016 to 2017, 1% for 2017 to 2018, 0.5% to 2019 and 0.1% to 2020; for comparison goods: 5.5% for 2016-2017, 2.8% for 2017-2018, 2.6% to 2019 and 2.8% to 2020; for leisure (food and beverage): 0.3% for 2016-2017, 0% for 2017-2018, 1.3% to 2019 and 1% to 2020.

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 2020; 3.3% per annum growth for comparison goods after 2020; and food and beverage 1.2% after 2020. 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:

- 9.4% of convenience goods expenditure; and
- 18.1% 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:

- 2.8% of convenience goods expenditure; and
- 13.6% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.6% and 21.5% 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 Population - Scenario 1: Core Strategy delivery at low density (5,500 dwellings at 2.1 people per dwelling)

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 Population - Scenario 2: Otterpool Masterplan delivery at low density (6,375 dwellings at 2.1 people per dwelling)

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 (Table 9.1 Planning and Delivery Statement) - 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 1C Population - Scenario 3: Core Strategy delivery at high density (5,500 dwellings at 2.8 people per dwelling)

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	784	5,253	10,086	15,400
Total	130,933	134,834	140,870	146,746	152,550

Sources:

Experian MMG 3 Population Projections 2016
 Otterpool Park Masterplan phasing - 2.8 people per dwelling
 2022 = 280 dwellings (784 people)
 2027 = 1,876 dwellings (5,253 people)
 2032 = 3,602 dwellings (10,086 people)
 2037 = 5,500 dwellings (15,400 people)

Table 1D Population - Scenario 4: Otterpool Masterplan delivery at high density (6,375 dwellings at 2.8 people per dwelling)

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	910	6,090	11,690	17,850
Total	130,933	134,960	141,707	148,350	155,000

Sources:

Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park
 Otterpool Park Masterplan phasing (Table 9.1 Planning and Delivery Statement) - 2.8 people per dwelling
 2022 = 325 dwellings (910 people)
 2027 = 2,175 dwellings (4,568 people)
 2032 = 4,175 dwellings (11,690 people)
 2037 = 6,375 dwellings (17,850 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	2,092	2,089	2,086	2,088	2,091
Zone 2 - Hythe	2,418	2,414	2,411	2,413	2,418
Zone 3 - New Romney & Dymchurch	2,465	2,462	2,458	2,460	2,465
Zone 4 - Lydd	2,347	2,344	2,341	2,342	2,347
Zone 5 - Sellinge & Ashford fringes	2,606	2,602	2,599	2,601	2,606
Zone 6 - Hawkinge, Lyminge & Capel	2,397	2,394	2,391	2,393	2,397
Zone 7 - Rural north and Dover fringes	2,717	2,714	2,710	2,712	2,717
Otterpool Park	2,435	2,431	2,428	2,430	2,434

Sources:

*Experian Local Expenditure 2016 (2016 prices)**Experian Retail Planner Briefing Note 16 (December 2018)*

Growth Rates: 2016 to 2018 = +2.3%; 2018 to 2022 = +0.8% and 0.1% per annum beyond 2022.

Excludes Special Forms of Trading based on Experian adjusted national average for non-retail businesses

Table 3A Total convenience goods expenditure (£m) - Scenario 1: Core Strategy delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	110.13	112.12	112.24	112.60	112.78
Zone 2 - Hythe	44.37	44.97	44.86	44.59	44.09
Zone 3 - New Romney & Dymchurch	41.14	42.03	42.08	41.97	41.65
Zone 4 - Lydd	14.95	15.40	15.59	15.71	15.78
Zone 5 - Sellinge & Ashford fringes	32.46	33.80	35.63	37.13	38.57
Zone 6 - Hawkinge, Lyminge & Capel	35.85	36.79	37.29	37.64	37.75
Zone 7 - Rural north and Dover fringes	25.73	26.46	27.41	28.42	29.38
Otterpool Park	0.00	1.43	9.57	18.38	28.11
Study Area Total	304.63	313.00	324.68	336.44	348.11

Source: Tables 1A and 2

Table 3B Total convenience goods expenditure (£m) - Scenario 2: Otterpool Masterplan delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	110.13	112.12	112.24	112.60	112.78
Zone 2 - Hythe	44.37	44.97	44.86	44.59	44.09
Zone 3 - New Romney & Dymchurch	41.14	42.03	42.08	41.97	41.65
Zone 4 - Lydd	14.95	15.40	15.59	15.71	15.78
Zone 5 - Sellinge & Ashford fringes	32.46	33.80	35.63	37.13	38.57
Zone 6 - Hawkinge, Lyminge & Capel	35.85	36.79	37.29	37.64	37.75
Zone 7 - Rural north and Dover fringes	25.73	26.46	27.41	28.42	29.38
Otterpool Park	0.00	1.66	11.09	21.31	32.59
Study Area Total	304.63	313.23	326.20	339.37	352.58

Source: Tables 1B and 2

Table 3C Total convenience goods expenditure (£m) - Scenario 3: Core Strategy delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	110.13	112.12	112.24	112.60	112.78
Zone 2 - Hythe	44.37	44.97	44.86	44.59	44.09
Zone 3 - New Romney & Dymchurch	41.14	42.03	42.08	41.97	41.65
Zone 4 - Lydd	14.95	15.40	15.59	15.71	15.78
Zone 5 - Sellinge & Ashford fringes	32.46	33.80	35.63	37.13	38.57
Zone 6 - Hawkinge, Lyminge & Capel	35.85	36.79	37.29	37.64	37.75
Zone 7 - Rural north and Dover fringes	25.73	26.46	27.41	28.42	29.38
Otterpool Park	0.00	1.91	12.75	24.51	37.48
Study Area Total	304.63	313.48	327.87	342.57	357.48

Source: Tables 1C and 2

Table 3D Total convenience goods expenditure (£m) - Scenario 4: Otterpool Masterplan delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	110.13	112.12	112.24	112.60	112.78
Zone 2 - Hythe	44.37	44.97	44.86	44.59	44.09
Zone 3 - New Romney & Dymchurch	41.14	42.03	42.08	41.97	41.65
Zone 4 - Lydd	14.95	15.40	15.59	15.71	15.78
Zone 5 - Sellinge & Ashford fringes	32.46	33.80	35.63	37.13	38.57
Zone 6 - Hawkinge, Lyminge & Capel	35.85	36.79	37.29	37.64	37.75
Zone 7 - Rural north and Dover fringes	25.73	26.46	27.41	28.42	29.38
Otterpool Park	0.00	2.21	14.79	28.41	43.45
Study Area Total	304.63	313.78	329.90	346.47	363.44

Source: Tables 1D 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	110.13	44.37	41.14	14.95	32.46	35.85	25.73	0.00		304.63
Zone 1 - Folkestone/Cheriton	99.33	7.59	6.21	0.40	1.95	24.38	3.58	0.00	15.94	159.37
Zone 2 - Hythe	4.52	34.96	10.94	0.55	3.21	1.68	1.21	0.00	6.34	63.42
Zone 3 - New Romney	0.11	0.18	16.42	4.23	0.10	0.07	0.00	0.00	2.34	23.45
Other in District (Zone 4/6)	2.31	0.22	0.33	0.43	2.66	6.74	0.69	0.00	1.49	14.88
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	106.27	42.95	33.90	5.62	7.92	32.87	5.48	0.00	26.11	261.13
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.04	0.04	0.82	0.00		1.94
Ashford	1.43	0.93	6.83	3.53	22.37	0.43	4.79	0.00		40.30
Canterbury	0.33	0.04	0.00	0.01	0.23	0.32	5.99	0.00		6.93
Dover	1.43	0.04	0.29	0.04	0.26	1.54	6.38	0.00		9.99
Rye	0.00	0.00	0.08	2.92	0.19	0.00	0.00	0.00		3.19
Tenterden	0.00	0.31	0.00	0.58	0.32	0.14	0.13	0.00		1.49
Other	0.66	0.04	0.04	2.24	0.13	0.50	2.14	0.00		5.76
Outside Study Area Total	3.85	1.42	7.24	9.33	24.54	2.98	20.25	0.00		69.61
TOTAL	110.13	44.37	41.14	14.95	32.46	35.85	25.73	0.00	26.11	330.74

Source: Tables 3A and 4

Table 6A - Future 2022 convenience goods expenditure patterns by zone (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2022	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.43		313.00
Zone 1 - Folkestone/Cheriton	101.13	7.69	6.35	0.42	2.03	25.02	3.68	0.07	16.26	162.64
Zone 2 - Hythe	4.60	35.44	11.18	0.57	3.35	1.73	1.24	0.26	6.48	64.84
Zone 3 - New Romney	0.11	0.18	16.77	4.36	0.10	0.07	0.00	0.00	2.40	24.00
Other in District (Zone 4/6)	2.35	0.22	0.34	0.45	2.77	6.92	0.71	0.00	1.53	15.29
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.07	0.12	1.19
District Total	108.19	43.53	34.63	5.79	8.25	33.74	5.64	1.40	26.80	267.97
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.08	0.04	0.85	0.00		2.01
Ashford	1.46	0.94	6.98	3.64	23.29	0.44	4.92	0.03		41.70
Canterbury	0.34	0.04	0.00	0.02	0.24	0.33	6.16	0.00		7.13
Dover	1.46	0.04	0.29	0.05	0.27	1.58	6.56	0.00		10.26
Rye	0.00	0.00	0.08	3.00	0.20	0.00	0.00	0.00		3.29
Tenterden	0.00	0.31	0.00	0.60	0.34	0.15	0.13	0.00		1.53
Other	0.67	0.04	0.04	2.31	0.14	0.52	2.20	0.00		5.92
Outside Study Area Total	3.92	1.44	7.40	9.61	25.55	3.05	20.82	0.03		71.83
TOTAL	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.43	26.80	339.80

Source: Tables 3A and 4

Table 6B - Future 2022 convenience goods expenditure patterns by zone (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2022	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.66		313.23
Zone 1 - Folkestone/Cheriton	101.13	7.69	6.35	0.42	2.03	25.02	3.68	0.08	16.27	162.65
Zone 2 - Hythe	4.60	35.44	11.18	0.57	3.35	1.73	1.24	0.30	6.49	64.89
Zone 3 - New Romney	0.11	0.18	16.77	4.36	0.10	0.07	0.00	0.00	2.40	24.00
Other in District (Zone 4/6)	2.35	0.22	0.34	0.45	2.77	6.92	0.71	0.00	1.53	15.29
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.25	0.14	1.38
District Total	108.19	43.53	34.63	5.79	8.25	33.74	5.64	1.63	26.82	268.22
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.08	0.04	0.85	0.00		2.01
Ashford	1.46	0.94	6.98	3.64	23.29	0.44	4.92	0.03		41.70
Canterbury	0.34	0.04	0.00	0.02	0.24	0.33	6.16	0.00		7.13
Dover	1.46	0.04	0.29	0.05	0.27	1.58	6.56	0.00		10.26
Rye	0.00	0.00	0.08	3.00	0.20	0.00	0.00	0.00		3.29
Tenterden	0.00	0.31	0.00	0.60	0.34	0.15	0.13	0.00		1.53
Other	0.67	0.04	0.04	2.31	0.14	0.52	2.20	0.00		5.92
Outside Study Area Total	3.92	1.44	7.40	9.61	25.55	3.05	20.82	0.03		71.84
TOTAL	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.66	26.82	340.06

Source: Tables 3B and 4

Table 6C - Future 2022 convenience goods expenditure patterns by zone (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2022	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.91		313.48
Zone 1 - Folkestone/Cheriton	101.13	7.69	6.35	0.42	2.03	25.02	3.68	0.10	16.27	162.67
Zone 2 - Hythe	4.60	35.44	11.18	0.57	3.35	1.73	1.24	0.34	6.49	64.94
Zone 3 - New Romney	0.11	0.18	16.77	4.36	0.10	0.07	0.00	0.00	2.40	24.00
Other in District (Zone 4/6)	2.35	0.22	0.34	0.45	2.77	6.92	0.71	0.00	1.53	15.29
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43	0.16	1.59
District Total	108.19	43.53	34.63	5.79	8.25	33.74	5.64	1.87	26.85	268.49
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.08	0.04	0.85	0.00		2.01
Ashford	1.46	0.94	6.98	3.64	23.29	0.44	4.92	0.04		41.71
Canterbury	0.34	0.04	0.00	0.02	0.24	0.33	6.16	0.00		7.13
Dover	1.46	0.04	0.29	0.05	0.27	1.58	6.56	0.00		10.26
Rye	0.00	0.00	0.08	3.00	0.20	0.00	0.00	0.00		3.29
Tenterden	0.00	0.31	0.00	0.60	0.34	0.15	0.13	0.00		1.53
Other	0.67	0.04	0.04	2.31	0.14	0.52	2.20	0.00		5.92
Outside Study Area Total	3.92	1.44	7.40	9.61	25.55	3.05	20.82	0.04		71.84
TOTAL	112.12	44.97	42.03	15.40	33.80	36.79	26.46	1.91	26.85	340.33

Source: Tables 3C and 4

Table 6D - Future 2022 convenience goods expenditure patterns by zone (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2022	112.12	44.97	42.03	15.40	33.80	36.79	26.46	2.21		313.78
Zone 1 - Folkestone/Cheriton	101.13	7.69	6.35	0.42	2.03	25.02	3.68	0.11	16.27	162.68
Zone 2 - Hythe	4.60	35.44	11.18	0.57	3.35	1.73	1.24	0.40	6.50	65.00
Zone 3 - New Romney	0.11	0.18	16.77	4.36	0.10	0.07	0.00	0.00	2.40	24.00
Other in District (Zone 4/6)	2.35	0.22	0.34	0.45	2.77	6.92	0.71	0.00	1.53	15.29
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.66	0.18	1.84
District Total	108.19	43.53	34.63	5.79	8.25	33.74	5.64	2.17	26.88	268.82
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.08	0.04	0.85	0.00		2.01
Ashford	1.46	0.94	6.98	3.64	23.29	0.44	4.92	0.04		41.71
Canterbury	0.34	0.04	0.00	0.02	0.24	0.33	6.16	0.00		7.13
Dover	1.46	0.04	0.29	0.05	0.27	1.58	6.56	0.00		10.26
Rye	0.00	0.00	0.08	3.00	0.20	0.00	0.00	0.00		3.29
Tenterden	0.00	0.31	0.00	0.60	0.34	0.15	0.13	0.00		1.53
Other	0.67	0.04	0.04	2.31	0.14	0.52	2.20	0.00		5.92
Outside Study Area Total	3.92	1.44	7.40	9.61	25.55	3.05	20.82	0.04		71.85
TOTAL	112.12	44.97	42.03	15.40	33.80	36.79	26.46	2.21	26.88	340.67

Source: Tables 3D and 4

Table 7A - Future 2027 convenience goods expenditure patterns by zone (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2027	112.24	44.86	42.08	15.59	35.63	37.29	27.41	9.57		324.68
Zone 1 - Folkestone/Cheriton	101.24	7.67	6.35	0.42	2.14	25.36	3.81	0.48	16.39	163.86
Zone 2 - Hythe	4.60	35.35	11.19	0.58	3.53	1.75	1.29	1.72	6.67	66.68
Zone 3 - New Romney	0.11	0.18	16.79	4.41	0.11	0.07	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.45	2.92	7.01	0.74	0.00	1.56	15.60
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.17	0.80	7.97
District Total	108.31	43.43	34.67	5.86	8.69	34.20	5.84	9.37	27.82	278.20
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.14	0.04	0.88	0.00		2.10
Ashford	1.46	0.94	6.99	3.68	24.55	0.45	5.10	0.19		43.35
Canterbury	0.34	0.04	0.00	0.02	0.25	0.34	6.39	0.00		7.37
Dover	1.46	0.04	0.29	0.05	0.29	1.60	6.80	0.00		10.53
Rye	0.00	0.00	0.08	3.04	0.21	0.00	0.00	0.00		3.34
Tenterden	0.00	0.31	0.00	0.61	0.36	0.15	0.14	0.00		1.56
Other	0.67	0.04	0.04	2.34	0.14	0.52	2.28	0.00		6.04
Outside Study Area Total	3.93	1.44	7.41	9.73	26.94	3.10	21.57	0.19		74.30
TOTAL	112.24	44.86	42.08	15.59	35.63	37.29	27.41	9.57	27.82	352.50

Source: Tables 3A and 4

Table 7B - Future 2027 convenience goods expenditure patterns by zone (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2027	112.24	44.86	42.08	15.59	35.63	37.29	27.41	11.09		326.20
Zone 1 - Folkestone/Cheriton	101.24	7.67	6.35	0.42	2.14	25.36	3.81	0.55	16.39	163.95
Zone 2 - Hythe	4.60	35.35	11.19	0.58	3.53	1.75	1.29	2.00	6.70	66.99
Zone 3 - New Romney	0.11	0.18	16.79	4.41	0.11	0.07	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.45	2.92	7.01	0.74	0.00	1.56	15.60
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.32	0.92	9.24
District Total	108.31	43.43	34.67	5.86	8.69	34.20	5.84	10.87	27.99	279.86
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.14	0.04	0.88	0.00		2.10
Ashford	1.46	0.94	6.99	3.68	24.55	0.45	5.10	0.22		43.38
Canterbury	0.34	0.04	0.00	0.02	0.25	0.34	6.39	0.00		7.37
Dover	1.46	0.04	0.29	0.05	0.29	1.60	6.80	0.00		10.53
Rye	0.00	0.00	0.08	3.04	0.21	0.00	0.00	0.00		3.34
Tenterden	0.00	0.31	0.00	0.61	0.36	0.15	0.14	0.00		1.56
Other	0.67	0.04	0.04	2.34	0.14	0.52	2.28	0.00		6.04
Outside Study Area Total	3.93	1.44	7.41	9.73	26.94	3.10	21.57	0.22		74.33
TOTAL	112.24	44.86	42.08	15.59	35.63	37.29	27.41	11.09	27.99	354.19

Source: Tables 3B and 4

Table 7C - Future 2027 convenience goods expenditure patterns by zone (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2027	112.24	44.86	42.08	15.59	35.63	37.29	27.41	12.75		327.87
Zone 1 - Folkestone/Cheriton	101.24	7.67	6.35	0.42	2.14	25.36	3.81	0.64	16.40	164.04
Zone 2 - Hythe	4.60	35.35	11.19	0.58	3.53	1.75	1.29	2.30	6.73	67.32
Zone 3 - New Romney	0.11	0.18	16.79	4.41	0.11	0.07	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.45	2.92	7.01	0.74	0.00	1.56	15.60
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.57	1.06	10.63
District Total	108.31	43.43	34.67	5.86	8.69	34.20	5.84	12.50	28.17	281.68
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.14	0.04	0.88	0.00		2.10
Ashford	1.46	0.94	6.99	3.68	24.55	0.45	5.10	0.26		43.42
Canterbury	0.34	0.04	0.00	0.02	0.25	0.34	6.39	0.00		7.37
Dover	1.46	0.04	0.29	0.05	0.29	1.60	6.80	0.00		10.53
Rye	0.00	0.00	0.08	3.04	0.21	0.00	0.00	0.00		3.34
Tenterden	0.00	0.31	0.00	0.61	0.36	0.15	0.14	0.00		1.56
Other	0.67	0.04	0.04	2.34	0.14	0.52	2.28	0.00		6.04
Outside Study Area Total	3.93	1.44	7.41	9.73	26.94	3.10	21.57	0.26		74.36
TOTAL	112.24	44.86	42.08	15.59	35.63	37.29	27.41	12.75	28.17	356.03

Source: Tables 3C and 4

Table 7D - Future 2027 convenience goods expenditure patterns by zone (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2027	112.24	44.86	42.08	15.59	35.63	37.29	27.41	14.79		329.90
Zone 1 - Folkestone/Cheriton	101.24	7.67	6.35	0.42	2.14	25.36	3.81	0.74	16.42	164.15
Zone 2 - Hythe	4.60	35.35	11.19	0.58	3.53	1.75	1.29	2.66	6.77	67.73
Zone 3 - New Romney	0.11	0.18	16.79	4.41	0.11	0.07	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.45	2.92	7.01	0.74	0.00	1.56	15.60
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.09	1.23	12.32
District Total	108.31	43.43	34.67	5.86	8.69	34.20	5.84	14.49	28.39	283.89
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.14	0.04	0.88	0.00		2.10
Ashford	1.46	0.94	6.99	3.68	24.55	0.45	5.10	0.30		43.46
Canterbury	0.34	0.04	0.00	0.02	0.25	0.34	6.39	0.00		7.37
Dover	1.46	0.04	0.29	0.05	0.29	1.60	6.80	0.00		10.53
Rye	0.00	0.00	0.08	3.04	0.21	0.00	0.00	0.00		3.34
Tenterden	0.00	0.31	0.00	0.61	0.36	0.15	0.14	0.00		1.56
Other	0.67	0.04	0.04	2.34	0.14	0.52	2.28	0.00		6.04
Outside Study Area Total	3.93	1.44	7.41	9.73	26.94	3.10	21.57	0.30		74.40
TOTAL	112.24	44.86	42.08	15.59	35.63	37.29	27.41	14.79	28.39	358.29

Source: Tables 3D and 4

Table 8A - Future 2032 convenience goods expenditure patterns by zone (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2032	112.60	44.59	41.97	15.71	37.13	37.64	28.42	18.38		336.44
Zone 1 - Folkestone/Cheriton	101.57	7.62	6.34	0.42	2.23	25.59	3.95	0.92	16.52	165.16
Zone 2 - Hythe	4.62	35.13	11.16	0.58	3.68	1.77	1.34	3.31	6.84	68.43
Zone 3 - New Romney	0.11	0.18	16.75	4.45	0.11	0.08	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.46	3.05	7.08	0.77	0.00	1.59	15.85
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.79	1.53	15.32
District Total	108.66	43.16	34.59	5.91	9.06	34.51	6.05	18.01	28.88	288.84
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.19	0.04	0.91	0.00		2.18
Ashford	1.46	0.94	6.97	3.71	25.59	0.45	5.29	0.37		44.77
Canterbury	0.34	0.04	0.00	0.02	0.26	0.34	6.62	0.00		7.62
Dover	1.46	0.04	0.29	0.05	0.30	1.62	7.05	0.00		10.81
Rye	0.00	0.00	0.08	3.06	0.22	0.00	0.00	0.00		3.37
Tenterden	0.00	0.31	0.00	0.61	0.37	0.15	0.14	0.00		1.59
Other	0.68	0.04	0.04	2.36	0.15	0.53	2.36	0.00		6.15
Outside Study Area Total	3.94	1.43	7.39	9.80	28.07	3.12	22.37	0.37		76.49
TOTAL	112.60	44.59	41.97	15.71	37.13	37.64	28.42	18.38	28.88	365.33

Source: Tables 3A and 4

Table 8B - Future 2032 convenience goods expenditure patterns by zone (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2032	112.60	44.59	41.97	15.71	37.13	37.64	28.42	21.31		339.37
Zone 1 - Folkestone/Cheriton	101.57	7.62	6.34	0.42	2.23	25.59	3.95	1.07	16.53	165.32
Zone 2 - Hythe	4.62	35.13	11.16	0.58	3.68	1.77	1.34	3.84	6.90	69.01
Zone 3 - New Romney	0.11	0.18	16.75	4.45	0.11	0.08	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.46	3.05	7.08	0.77	0.00	1.59	15.85
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.98	1.78	17.76
District Total	108.66	43.16	34.59	5.91	9.06	34.51	6.05	20.88	29.20	292.02
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.19	0.04	0.91	0.00		2.18
Ashford	1.46	0.94	6.97	3.71	25.59	0.45	5.29	0.43		44.83
Canterbury	0.34	0.04	0.00	0.02	0.26	0.34	6.62	0.00		7.62
Dover	1.46	0.04	0.29	0.05	0.30	1.62	7.05	0.00		10.81
Rye	0.00	0.00	0.08	3.06	0.22	0.00	0.00	0.00		3.37
Tenterden	0.00	0.31	0.00	0.61	0.37	0.15	0.14	0.00		1.59
Other	0.68	0.04	0.04	2.36	0.15	0.53	2.36	0.00		6.15
Outside Study Area Total	3.94	1.43	7.39	9.80	28.07	3.12	22.37	0.43		76.55
TOTAL	112.60	44.59	41.97	15.71	37.13	37.64	28.42	21.31	29.20	368.57

Source: Tables 3B and 4

Table 8C - Future 2032 convenience goods expenditure patterns by zone (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2032	112.60	44.59	41.97	15.71	37.13	37.64	28.42	24.51		342.57
Zone 1 - Folkestone/Cheriton	101.57	7.62	6.34	0.42	2.23	25.59	3.95	1.23	16.55	165.50
Zone 2 - Hythe	4.62	35.13	11.16	0.58	3.68	1.77	1.34	4.41	6.97	69.65
Zone 3 - New Romney	0.11	0.18	16.75	4.45	0.11	0.08	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.46	3.05	7.08	0.77	0.00	1.59	15.85
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.38	2.04	20.42
District Total	108.66	43.16	34.59	5.91	9.06	34.51	6.05	24.02	29.55	295.51
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.19	0.04	0.91	0.00		2.18
Ashford	1.46	0.94	6.97	3.71	25.59	0.45	5.29	0.49		44.89
Canterbury	0.34	0.04	0.00	0.02	0.26	0.34	6.62	0.00		7.62
Dover	1.46	0.04	0.29	0.05	0.30	1.62	7.05	0.00		10.81
Rye	0.00	0.00	0.08	3.06	0.22	0.00	0.00	0.00		3.37
Tenterden	0.00	0.31	0.00	0.61	0.37	0.15	0.14	0.00		1.59
Other	0.68	0.04	0.04	2.36	0.15	0.53	2.36	0.00		6.15
Outside Study Area Total	3.94	1.43	7.39	9.80	28.07	3.12	22.37	0.49		76.61
TOTAL	112.60	44.59	41.97	15.71	37.13	37.64	28.42	24.51	29.55	372.12

Source: Tables 3C and 4

Table 8D - Future 2032 convenience goods expenditure patterns by zone (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2032	112.60	44.59	41.97	15.71	37.13	37.64	28.42	28.41		346.47
Zone 1 - Folkestone/Cheriton	101.57	7.62	6.34	0.42	2.23	25.59	3.95	1.42	16.57	165.72
Zone 2 - Hythe	4.62	35.13	11.16	0.58	3.68	1.77	1.34	5.11	7.04	70.43
Zone 3 - New Romney	0.11	0.18	16.75	4.45	0.11	0.08	0.00	0.00	2.41	24.08
Other in District (Zone 4/6)	2.36	0.22	0.34	0.46	3.05	7.08	0.77	0.00	1.59	15.85
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.31	2.37	23.67
District Total	108.66	43.16	34.59	5.91	9.06	34.51	6.05	27.84	29.98	299.75
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.19	0.04	0.91	0.00		2.18
Ashford	1.46	0.94	6.97	3.71	25.59	0.45	5.29	0.57		44.97
Canterbury	0.34	0.04	0.00	0.02	0.26	0.34	6.62	0.00		7.62
Dover	1.46	0.04	0.29	0.05	0.30	1.62	7.05	0.00		10.81
Rye	0.00	0.00	0.08	3.06	0.22	0.00	0.00	0.00		3.37
Tenterden	0.00	0.31	0.00	0.61	0.37	0.15	0.14	0.00		1.59
Other	0.68	0.04	0.04	2.36	0.15	0.53	2.36	0.00		6.15
Outside Study Area Total	3.94	1.43	7.39	9.80	28.07	3.12	22.37	0.57		76.69
TOTAL	112.60	44.59	41.97	15.71	37.13	37.64	28.42	28.41	29.98	376.44

Source: Tables 3D and 4

Table 9A - Future 2037 convenience goods expenditure patterns by zone (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2037	112.78	44.09	41.65	15.78	38.57	37.75	29.38	28.11		348.11
Zone 1 - Folkestone/Cheriton	101.72	7.54	6.29	0.43	2.31	25.67	4.08	1.41	16.61	166.06
Zone 2 - Hythe	4.62	34.74	11.08	0.58	3.82	1.77	1.38	5.06	7.01	70.07
Zone 3 - New Romney	0.11	0.18	16.62	4.47	0.12	0.08	0.00	0.00	2.40	23.96
Other in District (Zone 4/6)	2.37	0.22	0.33	0.46	3.16	7.10	0.79	0.00	1.60	16.04
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.08	2.34	23.43
District Total	108.83	42.68	34.32	5.93	9.41	34.61	6.26	27.55	29.96	299.55
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.23	0.04	0.94	0.00		2.26
Ashford	1.47	0.93	6.91	3.72	26.57	0.45	5.47	0.56		46.08
Canterbury	0.34	0.04	0.00	0.02	0.27	0.34	6.85	0.00		7.85
Dover	1.47	0.04	0.29	0.05	0.31	1.62	7.29	0.00		11.07
Rye	0.00	0.00	0.08	3.08	0.23	0.00	0.00	0.00		3.39
Tenterden	0.00	0.31	0.00	0.62	0.39	0.15	0.15	0.00		1.61
Other	0.68	0.04	0.04	2.37	0.15	0.53	2.44	0.00		6.25
Outside Study Area Total	3.95	1.41	7.33	9.85	29.16	3.13	23.13	0.56		78.51
TOTAL	112.78	44.09	41.65	15.78	38.57	37.75	29.38	28.11	29.96	378.06

Source: Tables 3A and 4

Table 9B - Future 2037 convenience goods expenditure patterns by zone (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2037	112.78	44.09	41.65	15.78	38.57	37.75	29.38	32.59		352.58
Zone 1 - Folkestone/Cheriton	101.72	7.54	6.29	0.43	2.31	25.67	4.08	1.63	16.63	166.30
Zone 2 - Hythe	4.62	34.74	11.08	0.58	3.82	1.77	1.38	5.87	7.10	70.97
Zone 3 - New Romney	0.11	0.18	16.62	4.47	0.12	0.08	0.00	0.00	2.40	23.96
Other in District (Zone 4/6)	2.37	0.22	0.33	0.46	3.16	7.10	0.79	0.00	1.60	16.04
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24.44	2.72	27.16
District Total	108.83	42.68	34.32	5.93	9.41	34.61	6.26	31.93	30.44	304.42
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.23	0.04	0.94	0.00		2.26
Ashford	1.47	0.93	6.91	3.72	26.57	0.45	5.47	0.65		46.17
Canterbury	0.34	0.04	0.00	0.02	0.27	0.34	6.85	0.00		7.85
Dover	1.47	0.04	0.29	0.05	0.31	1.62	7.29	0.00		11.07
Rye	0.00	0.00	0.08	3.08	0.23	0.00	0.00	0.00		3.39
Tenterden	0.00	0.31	0.00	0.62	0.39	0.15	0.15	0.00		1.61
Other	0.68	0.04	0.04	2.37	0.15	0.53	2.44	0.00		6.25
Outside Study Area Total	3.95	1.41	7.33	9.85	29.16	3.13	23.13	0.65		78.60
TOTAL	112.78	44.09	41.65	15.78	38.57	37.75	29.38	32.59	30.44	383.02

Source: Tables 3B and 4

Table 9C - Future 2037 convenience goods expenditure patterns by zone (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2037	112.78	44.09	41.65	15.78	38.57	37.75	29.38	37.48		357.48
Zone 1 - Folkestone/Cheriton	101.72	7.54	6.29	0.43	2.31	25.67	4.08	1.87	16.66	166.58
Zone 2 - Hythe	4.62	34.74	11.08	0.58	3.82	1.77	1.38	6.75	7.19	71.94
Zone 3 - New Romney	0.11	0.18	16.62	4.47	0.12	0.08	0.00	0.00	2.40	23.96
Other in District (Zone 4/6)	2.37	0.22	0.33	0.46	3.16	7.10	0.79	0.00	1.60	16.04
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28.11	3.12	31.24
District Total	108.83	42.68	34.32	5.93	9.41	34.61	6.26	36.73	30.98	309.75
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.23	0.04	0.94	0.00		2.26
Ashford	1.47	0.93	6.91	3.72	26.57	0.45	5.47	0.75		46.27
Canterbury	0.34	0.04	0.00	0.02	0.27	0.34	6.85	0.00		7.85
Dover	1.47	0.04	0.29	0.05	0.31	1.62	7.29	0.00		11.07
Rye	0.00	0.00	0.08	3.08	0.23	0.00	0.00	0.00		3.39
Tenterden	0.00	0.31	0.00	0.62	0.39	0.15	0.15	0.00		1.61
Other	0.68	0.04	0.04	2.37	0.15	0.53	2.44	0.00		6.25
Outside Study Area Total	3.95	1.41	7.33	9.85	29.16	3.13	23.13	0.75		78.70
TOTAL	112.78	44.09	41.65	15.78	38.57	37.75	29.38	37.48	30.98	388.45

Source: Tables 3C and 4

Table 9D - Future 2037 convenience goods expenditure patterns by zone (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool	Inflow	Total
Expenditure 2037	112.78	44.09	41.65	15.78	38.57	37.75	29.38	43.45		363.44
Zone 1 - Folkestone/Cheriton	101.72	7.54	6.29	0.43	2.31	25.67	4.08	2.17	16.69	166.91
Zone 2 - Hythe	4.62	34.74	11.08	0.58	3.82	1.77	1.38	7.82	7.31	73.14
Zone 3 - New Romney	0.11	0.18	16.62	4.47	0.12	0.08	0.00	0.00	2.40	23.96
Other in District (Zone 4/6)	2.37	0.22	0.33	0.46	3.16	7.10	0.79	0.00	1.60	16.04
Otterpool Park - Proposed facilities	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.59	3.62	36.21
District Total	108.83	42.68	34.32	5.93	9.41	34.61	6.26	42.58	31.62	316.25
Rest of study area (outside District)	0.00	0.04	0.00	0.00	1.23	0.04	0.94	0.00		2.26
Ashford	1.47	0.93	6.91	3.72	26.57	0.45	5.47	0.87		46.39
Canterbury	0.34	0.04	0.00	0.02	0.27	0.34	6.85	0.00		7.85
Dover	1.47	0.04	0.29	0.05	0.31	1.62	7.29	0.00		11.07
Rye	0.00	0.00	0.08	3.08	0.23	0.00	0.00	0.00		3.39
Tenterden	0.00	0.31	0.00	0.62	0.39	0.15	0.15	0.00		1.61
Other	0.68	0.04	0.04	2.37	0.15	0.53	2.44	0.00		6.25
Outside Study Area Total	3.95	1.41	7.33	9.85	29.16	3.13	23.13	0.87		78.82
TOTAL	112.78	44.09	41.65	15.78	38.57	37.75	29.38	43.45	31.62	395.07

Source: Tables 3D 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	£12,902	£48.09
Sainsbury's, Bouverie Road West, Folkestone	2,409	70%	1,686	£11,043	£18.62
Lidl, Shellons Street, Folkestone	809	80%	647	£9,543	£6.18
Sainsbury's, Park Farm Retail Park, Folkestone	4,472	65%	2,907	£11,043	£32.10
Morrisons, Cheriton Road, Folkestone	2,540	77%	1,956	£11,955	£23.38
Iceland, Sandgate Lane Shopping Centre, Folkestone	418	90%	376	£6,479	£2.44
Tesco Express, Dover Road, Folkestone	242	90%	218	£13,033	£2.84
Tesco Express, Foord Road, Folkestone	238	90%	214	£13,033	£2.79
Tesco Express, Bouverie Road West, Folkestone	240	90%	216	£13,033	£2.82
Co-operative, Cheriton Road, Folkestone	145	90%	131	£10,224	£1.33
	17,337		12,078		£140.59
Cheriton					
Tesco Extra, Cheriton High Street, Cheriton	3,569	70%	2,498	£13,033	£32.56
Co-operative, Cheriton High Street	333	90%	300	£10,224	£3.06
Marks & Spencer (BP), Cheriton High Street	84	90%	76	£9,896	£0.75
	3,986		2,874		£36.37
Hythe					
Sainsbury's, Military Road, Hythe	3,139	72%	2,260	£11,043	£24.96
Waitrose, Prospect Road, Hythe	1,634	85%	1,389	£12,223	£16.98
Aldi, High Street, Hythe	1,314	80%	1,051	£10,227	£10.75
Iceland, High Street, Hythe	273	90%	246	£6,479	£1.59
	6,360		4,946		£54.28
New Romney					
Sainsbury's, Dymchurch Road, New Romney	1,094	80%	875	£11,043	£9.66
	1,094		875		£9.66
Dymchurch					
Tesco Express, High Street, Dymchurch	175	90%	158	£13,033	£2.05
	175		158		£2.05
Hawkinge					
Lidl, Haven Drive, Hawkinge	1,256	73%	917	£9,543	£8.75
Tesco Express, Canterbury Road, Hawkinge	179	90%	161	£13,033	£2.10
	1,435		1,078		£10.85
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	£10,224	£1.32
	143		129		£1.32
TOTAL	30,686		22,285		£255.86

Source: VOA, ORC Storepoint 2018 and Global Data 2018

Table 11A - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - Scenario 1

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone/Cheriton	159.37	162.64	163.86	165.16	166.06
Zone 2 - Hythe	63.42	64.84	66.68	68.43	70.07
Zone 3 - New Romney	23.45	24.00	24.08	24.08	23.96
Other in District (Zone 4/6)	14.88	15.29	15.60	15.85	16.04
Otterpool Park	0.00	1.19	7.97	15.32	23.43
Total	261.13	267.97	278.20	288.84	299.55
Turnover of Existing Facilities					
Zone 1 - Folkestone/Cheriton	176.96	179.63	180.71	180.71	180.71
Zone 2 - Hythe	54.28	55.10	55.43	55.43	55.43
Zone 3 - New Romney	11.72	11.89	11.97	11.97	11.97
Other in District	12.91	13.10	13.18	13.18	13.18
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	255.86	259.72	261.28	261.28	261.28
Surplus/Deficit Expenditure £M					
Zone 1 - Folkestone/Cheriton	-17.58	-16.99	-16.84	-15.55	-14.65
Zone 2 - Hythe	9.15	9.75	11.25	13.00	14.64
Zone 3 - New Romney	11.73	12.10	12.12	12.11	12.00
Other in District	1.98	2.19	2.42	2.67	2.86
Otterpool Park	0.00	1.19	7.97	15.32	23.43
Total	5.27	8.25	16.93	27.56	38.27

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

Table 11B - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - Scenario 2

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone/Cheriton	159.37	162.65	163.95	165.32	166.30
Zone 2 - Hythe	63.42	64.89	66.99	69.01	70.97
Zone 3 - New Romney	23.45	24.00	24.08	24.08	23.96
Other in District (Zone 4/6)	14.88	15.29	15.60	15.85	16.04
Otterpool Park	0.00	1.38	9.24	17.76	27.16
Total	261.13	268.22	279.86	292.02	304.42
Turnover of Existing Facilities					
Zone 1 - Folkestone/Cheriton	176.96	179.63	180.71	180.71	180.71
Zone 2 - Hythe	54.28	55.10	55.43	55.43	55.43
Zone 3 - New Romney	11.72	11.89	11.97	11.97	11.97
Other in District	12.91	13.10	13.18	13.18	13.18
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	255.86	259.72	261.28	261.28	261.28
Surplus/Deficit Expenditure £M					
Zone 1 - Folkestone/Cheriton	-17.58	-16.97	-16.76	-15.38	-14.40
Zone 2 - Hythe	9.15	9.80	11.56	13.59	15.54
Zone 3 - New Romney	11.73	12.10	12.12	12.11	12.00
Other in District	1.98	2.19	2.42	2.67	2.86
Otterpool Park	0.00	1.38	9.24	17.76	27.16
Total	5.27	8.50	18.59	30.74	43.14

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

Table 11C - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - Scenario 3

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone/Cheriton	159.37	162.67	164.04	165.50	166.58
Zone 2 - Hythe	63.42	64.94	67.32	69.65	71.94
Zone 3 - New Romney	23.45	24.00	24.08	24.08	23.96
Other in District (Zone 4/6)	14.88	15.29	15.60	15.85	16.04
Otterpool Park	0.00	1.59	10.63	20.42	31.24
Total	261.13	268.49	281.68	295.51	309.75
Turnover of Existing Facilities					
Zone 1 - Folkestone/Cheriton	176.96	179.63	180.71	180.71	180.71
Zone 2 - Hythe	54.28	55.10	55.43	55.43	55.43
Zone 3 - New Romney	11.72	11.89	11.97	11.97	11.97
Other in District	12.91	13.10	13.18	13.18	13.18
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	255.86	259.72	261.28	261.28	261.28
Surplus/Deficit Expenditure £M					
Zone 1 - Folkestone/Cheriton	-17.58	-16.96	-16.67	-15.21	-14.13
Zone 2 - Hythe	9.15	9.84	11.89	14.23	16.52
Zone 3 - New Romney	11.73	12.10	12.12	12.11	12.00
Other in District	1.98	2.19	2.42	2.67	2.86
Otterpool Park	0.00	1.59	10.63	20.42	31.24
Total	5.27	8.77	20.40	34.23	48.48

Source: Tables 5, 6C to 9C and 10

Table 11D - Summary of Convenience Goods Expenditure 2018 to 2036 (£M) - Scenario 4

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone/Cheriton	159.37	162.68	164.04	165.72	166.91
Zone 2 - Hythe	63.42	65.00	67.73	70.43	73.14
Zone 3 - New Romney	23.45	24.00	24.08	24.08	23.96
Other in District (Zone 4/6)	14.88	15.29	15.60	15.85	16.04
Otterpool Park	0.00	1.84	12.32	23.67	36.21
Total	261.13	268.82	283.78	299.75	316.25
Turnover of Existing Facilities					
Zone 1 - Folkestone/Cheriton	176.96	179.63	180.71	180.71	180.71
Zone 2 - Hythe	54.28	55.10	55.43	55.43	55.43
Zone 3 - New Romney	11.72	11.89	11.97	11.97	11.97
Other in District	12.91	13.10	13.18	13.18	13.18
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	255.86	259.72	261.28	261.28	261.28
Surplus/Deficit Expenditure £M					
Zone 1 - Folkestone/Cheriton	-17.58	-16.94	-16.67	-14.99	-13.80
Zone 2 - Hythe	9.15	9.91	12.30	15.01	17.71
Zone 3 - New Romney	11.73	12.10	12.12	12.11	12.00
Other in District	1.98	2.19	2.42	2.67	2.86
Otterpool Park	0.00	1.84	12.32	23.67	36.21
Total	5.27	9.10	22.50	38.47	54.97

Source: Tables 5, 6D to 9D and 10

Table 12A - Folkestone & Hythe District Convenience Goods Floorspace Capacity - Scenario 1

	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,072	£12,072	£12,072
Floorspace Projection (sq.m net)				
Zone 1 - Folkestone/Cheriton	-1,415	-1,395	-1,288	-1,214
Zone 2 - Hythe	812	932	1,077	1,213
Zone 3 - New Romney	1,009	1,004	1,003	994
Other in District (Zone 4/6)	183	201	221	237
Otterpool Park	99	660	1,269	1,941
Total	688	1,402	2,283	3,170
Floorspace Projection (sq.m gross)				
Zone 1 - Folkestone/Cheriton	-2,022	-1,993	-1,840	-1,734
Zone 2 - Hythe	1,161	1,332	1,539	1,733
Zone 3 - New Romney	1,441	1,434	1,433	1,420
Other in District	261	287	316	338
Otterpool Park	142	943	1,813	2,772
Total	982	2,003	3,261	4,529

Source: Table 11A

Table 12B - Folkestone & Hythe District Convenience Goods Floorspace Capacity - Scenario 2

	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,072	£12,072	£12,072
Floorspace Projection (sq.m net)				
Zone 1 - Folkestone/Cheriton	-1,414	-1,388	-1,274	-1,193
Zone 2 - Hythe	816	958	1,125	1,287
Zone 3 - New Romney	1,009	1,004	1,003	994
Other in District (Zone 4/6)	183	201	221	237
Otterpool Park	115	766	1,471	2,249
Total	709	1,540	2,547	3,574
Floorspace Projection (sq.m gross)				
Zone 1 - Folkestone/Cheriton	-2,021	-1,983	-1,821	-1,704
Zone 2 - Hythe	1,166	1,368	1,608	1,839
Zone 3 - New Romney	1,441	1,434	1,433	1,420
Other in District	261	287	316	338
Otterpool Park	165	1,094	2,101	3,213
Total	1,012	2,199	3,638	5,105

Source: Table 11B

Table 12C - Folkestone & Hythe District Convenience Goods Floorspace Capacity - Scenario 3

	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,072	£12,072	£12,072
Floorspace Projection (sq.m net)				
Zone 1 - Folkestone/Cheriton	-1,413	-1,381	-1,260	-1,170
Zone 2 - Hythe	820	985	1,179	1,368
Zone 3 - New Romney	1,009	1,004	1,003	994
Other in District (Zone 4/6)	183	201	221	237
Otterpool Park	132	880	1,692	2,587
Total	731	1,690	2,836	4,016
Floorspace Projection (sq.m gross)				
Zone 1 - Folkestone/Cheriton	-2,019	-1,972	-1,799	-1,672
Zone 2 - Hythe	1,172	1,407	1,684	1,955
Zone 3 - New Romney	1,441	1,434	1,433	1,420
Other in District	261	287	316	338
Otterpool Park	189	1,258	2,417	3,696
Total	1,044	2,414	4,051	5,736

Source: Table 11C

Table 12D - Folkestone & Hythe District Convenience Goods Floorspace Capacity - Scenario 4

	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,072	£12,072	£12,072
Floorspace Projection (sq.m net)				
Zone 1 - Folkestone/Cheriton	-1,412	-1,381	-1,242	-1,143
Zone 2 - Hythe	825	1,019	1,243	1,467
Zone 3 - New Romney	1,009	1,004	1,003	994
Other in District (Zone 4/6)	183	201	221	237
Otterpool Park	154	1,021	1,961	2,999
Total	759	1,864	3,187	4,553
Floorspace Projection (sq.m gross)				
Zone 1 - Folkestone/Cheriton	-2,017	-1,972	-1,774	-1,633
Zone 2 - Hythe	1,179	1,455	1,776	2,096
Zone 3 - New Romney	1,441	1,434	1,433	1,420
Other in District	261	287	316	338
Otterpool Park	219	1,458	2,801	4,284
Total	1,084	2,662	4,553	6,505

Source: Table 11D

Appendix 3: Comparison goods capacity

Table 1A Population - Scenario 1: Core Strategy delivery at low density (5,500 dwellings at 2.1 people per dwelling)

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 Population - Scenario 2: Otterpool Masterplan delivery at low density (6,375 dwellings at 2.1 people per dwelling)

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 1C Population - Scenario 3: Core Strategy delivery at high density (5,500 dwellings at 2.8 people per dwelling)

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	784	5,253	10,086	15,400
Total	130,933	134,834	140,870	146,746	152,550

Sources:

Experian MMG 3 Population Projections 2016
 Otterpool Park Masterplan phasing - 2.8 people per dwelling
 2022 = 280 dwellings (784 people)
 2027 = 1,876 dwellings (5,253 people)
 2032 = 3,602 dwellings (10,086 people)
 2037 = 5,500 dwellings (15,400 people)

Table 1D Population - Scenario 4: Otterpool Masterplan delivery at high density (6,375 dwellings at 2.8 people per dwelling)

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	910	6,090	11,690	17,850
Total	130,933	134,960	141,707	148,350	155,000

Sources:

Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park
 Otterpool Park Masterplan phasing (Table 9.1 Planning and Delivery Statement) - 2.8 people per dwelling
 2022 = 325 dwellings (910 people)
 2027 = 2,175 dwellings (4,568 people)
 2032 = 4,175 dwellings (11,690 people)
 2037 = 6,375 dwellings (17,850 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	2,956	3,219	3,713	4,324	5,043
Zone 2 - Hythe	3,737	4,070	4,694	5,467	6,375
Zone 3 - New Romney & Dymchurch	3,288	3,581	4,130	4,810	5,609
Zone 4 - Lydd	2,863	3,118	3,597	4,189	4,884
Zone 5 - Sellinge & Ashford fringes	4,169	4,539	5,236	6,098	7,111
Zone 6 - Hawkinge, Lyminge & Capel	3,876	4,221	4,869	5,670	6,612
Zone 7 - Rural north and Dover fringes	4,344	4,730	5,456	6,355	7,410
Otterpool Park	3,605	3,925	4,528	5,273	6,149

Sources:

Experian Local Expenditure 2016 (2016 prices)

Experian Retail Planner Briefing Note 16 (December 2018)

Growth Rates: 2016 to 2018 = +8.4%; 2018 to 2022 = +12.5%; 3.3% per annum between 2022 and 2025 and 3.3% per annum beyond 2025.

Excludes Special Forms of Trading

Table 3A - Total Comparison Expenditure (£m) - Scenario 1: Core Strategy delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	155.61	172.76	199.79	233.18	271.99
Zone 2 - Hythe	68.57	75.82	87.34	101.01	116.24
Zone 3 - New Romney & Dymchurch	54.88	61.13	70.70	82.07	94.78
Zone 4 - Lydd	18.24	20.49	23.96	28.10	32.84
Zone 5 - Sellinge & Ashford fringes	51.93	58.97	71.78	87.06	105.24
Zone 6 - Hawkinge, Lyminge & Capel	57.97	64.87	75.95	89.18	104.12
Zone 7 - Rural north and Dover fringes	41.13	46.11	55.19	66.60	80.14
Otterpool Park	0.00	2.31	17.84	39.88	71.02
Study Area Total	448.33	502.46	602.55	727.09	876.36

Source: Tables 1A and 2

Table 3B - Total Comparison Expenditure (£m) - Scenario 2: Otterpool Masterplan delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	155.61	172.76	199.79	233.18	271.99
Zone 2 - Hythe	68.57	75.82	87.34	101.01	116.24
Zone 3 - New Romney & Dymchurch	54.88	61.13	70.70	82.07	94.78
Zone 4 - Lydd	18.24	20.49	23.96	28.10	32.84
Zone 5 - Sellinge & Ashford fringes	51.93	58.97	71.78	87.06	105.24
Zone 6 - Hawkinge, Lyminge & Capel	57.97	64.87	75.95	89.18	104.12
Zone 7 - Rural north and Dover fringes	41.13	46.11	55.19	66.60	80.14
Otterpool Park	0.00	2.68	20.68	46.23	82.32
Study Area Total	448.33	502.83	605.39	733.44	887.66

Source: Tables 1B and 2

Table 3C - Total Comparison Expenditure (£m) - Scenario 3: Core Strategy delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	155.61	172.76	199.79	233.18	271.99
Zone 2 - Hythe	68.57	75.82	87.34	101.01	116.24
Zone 3 - New Romney & Dymchurch	54.88	61.13	70.70	82.07	94.78
Zone 4 - Lydd	18.24	20.49	23.96	28.10	32.84
Zone 5 - Sellinge & Ashford fringes	51.93	58.97	71.78	87.06	105.24
Zone 6 - Hawkinge, Lyminge & Capel	57.97	64.87	75.95	89.18	104.12
Zone 7 - Rural north and Dover fringes	41.13	46.11	55.19	66.60	80.14
Otterpool Park	0.00	3.08	23.79	53.18	94.69
Study Area Total	448.33	503.23	608.49	740.39	900.04

Source: Tables 1C and 2

Table 3D - Total Comparison Expenditure (£m) - Scenario 4: Otterpool Masterplan delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	155.61	172.76	199.79	233.18	271.99
Zone 2 - Hythe	68.57	75.82	87.34	101.01	116.24
Zone 3 - New Romney & Dymchurch	54.88	61.13	70.70	82.07	94.78
Zone 4 - Lydd	18.24	20.49	23.96	28.10	32.84
Zone 5 - Sellinge & Ashford fringes	51.93	58.97	71.78	87.06	105.24
Zone 6 - Hawkinge, Lyminge & Capel	57.97	64.87	75.95	89.18	104.12
Zone 7 - Rural north and Dover fringes	41.13	46.11	55.19	66.60	80.14
Otterpool Park	0.00	3.57	27.58	61.64	109.76
Study Area Total	448.33	503.72	612.28	748.85	915.10

Source: Tables 1D 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	Inflow
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	155.61	68.57	54.88	18.24	51.93	57.97	41.13	0.00		448.33
Zone 1 - Folkestone	117.64	31.47	11.69	1.97	4.31	35.30	4.20	0.00	36.46	243.04
Zone 2 - Hythe	2.33	12.00	2.47	0.33	0.78	0.93	0.25	0.00	3.37	22.45
Zone 3 - New Romney	0.00	0.07	5.71	1.04	0.05	0.00	0.00	0.00	1.21	8.08
Other in District (Zone 4/6)	0.16	0.00	0.00	0.42	0.00	0.35	0.04	0.00	0.17	1.13
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
District Total	120.13	43.54	19.87	3.76	5.14	36.58	4.48	0.00	41.21	274.70
Rest of study area (outside District)	0.00	0.00	0.00	0.09	0.57	0.00	0.16	0.00		0.83
Ashford	8.71	10.22	26.62	8.03	32.15	5.56	4.98	0.00		96.26
Canterbury	17.12	10.08	3.40	0.77	8.10	13.39	21.97	0.00		74.82
Dover	1.24	0.34	0.11	0.05	0.05	0.87	5.43	0.00		8.10
Central London/West End	1.71	1.17	0.66	0.16	0.88	0.29	0.62	0.00		5.49
Hastings	0.00	0.00	0.33	2.26	0.26	0.12	0.00	0.00		2.97
Bluewater/Intu Lakeside	2.02	1.58	2.09	0.16	1.09	0.29	0.95	0.00		8.18
Rye	0.00	0.00	0.22	1.19	0.00	0.00	0.08	0.00		1.49
Maidstone	0.93	0.21	0.66	0.31	0.78	0.17	0.12	0.00		3.18
Other centres	3.73	1.44	0.93	1.46	2.91	0.70	2.34	0.00		13.52
Outside District Total	35.48	25.03	35.01	14.48	46.79	21.39	36.65	0.00		214.83
TOTAL	155.61	68.57	54.88	18.24	51.93	57.97	41.13	0.00	41.21	489.53

Source: Tables 3A and 4

Table 5A - Future 2022 Comparison Goods Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	172.76	75.82	61.13	20.49	58.97	64.87	46.11	2.31		502.46
Zone 1 - Folkestone	130.61	34.80	13.02	2.21	4.89	39.50	4.70	0.69	40.67	271.11
Zone 2 - Hythe	2.59	13.27	2.75	0.37	0.88	1.04	0.28	0.23	3.78	25.19
Zone 3 - New Romney	0.00	0.08	6.36	1.17	0.06	0.00	0.00	0.00	1.35	9.01
Other in District (Zone 4/6)	0.17	0.00	0.00	0.47	0.00	0.39	0.05	0.00	0.19	1.27
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.15	0.20	1.36
District Total	133.37	48.15	22.13	4.22	5.84	40.93	5.03	2.08	46.19	307.93
Rest of study area (outside District)	0.00	0.00	0.00	0.10	0.65	0.00	0.18	0.00		0.94
Ashford	9.67	11.30	29.65	9.02	36.50	6.23	5.58	0.12		108.06
Canterbury	19.00	11.15	3.79	0.86	9.20	14.98	24.62	0.12		83.72
Dover	1.38	0.38	0.12	0.06	0.06	0.97	6.09	0.00		9.06
Central London/West End	1.90	1.29	0.73	0.18	1.00	0.32	0.69	0.00		6.13
Hastings	0.00	0.00	0.37	2.54	0.29	0.13	0.00	0.00		3.33
Bluewater/Intu Lakeside	2.25	1.74	2.32	0.18	1.24	0.32	1.06	0.00		9.12
Rye	0.00	0.00	0.24	1.33	0.00	0.00	0.09	0.00		1.67
Maidstone	1.04	0.23	0.73	0.35	0.88	0.19	0.14	0.00		3.56
Other centres	4.15	1.59	1.04	1.64	3.30	0.78	2.63	0.00		15.13
Outside District Total	39.39	27.67	39.00	16.27	53.13	23.94	41.08	0.23		240.72
TOTAL	172.76	75.82	61.13	20.49	58.97	64.87	46.11	2.31	46.19	548.65

Source: Tables 3A and 4

Table 5B - Future 2022 Comparison Goods Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	172.76	75.82	61.13	20.49	58.97	64.87	46.11	2.68		502.83
Zone 1 - Folkestone	130.61	34.80	13.02	2.21	4.89	39.50	4.70	0.80	40.69	271.24
Zone 2 - Hythe	2.59	13.27	2.75	0.37	0.88	1.04	0.28	0.27	3.78	25.23
Zone 3 - New Romney	0.00	0.08	6.36	1.17	0.06	0.00	0.00	0.00	1.35	9.01
Other in District (Zone 4/6)	0.17	0.00	0.00	0.47	0.00	0.39	0.05	0.00	0.19	1.27
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.34	0.24	1.58
District Total	133.37	48.15	22.13	4.22	5.84	40.93	5.03	2.41	46.25	308.33
Rest of study area (outside District)	0.00	0.00	0.00	0.10	0.65	0.00	0.18	0.00		0.94
Ashford	9.67	11.30	29.65	9.02	36.50	6.23	5.58	0.13		108.08
Canterbury	19.00	11.15	3.79	0.86	9.20	14.98	24.62	0.13		83.74
Dover	1.38	0.38	0.12	0.06	0.06	0.97	6.09	0.00		9.06
Central London/West End	1.90	1.29	0.73	0.18	1.00	0.32	0.69	0.00		6.13
Hastings	0.00	0.00	0.37	2.54	0.29	0.13	0.00	0.00		3.33
Bluewater/Intu Lakeside	2.25	1.74	2.32	0.18	1.24	0.32	1.06	0.00		9.12
Rye	0.00	0.00	0.24	1.33	0.00	0.00	0.09	0.00		1.67
Maidstone	1.04	0.23	0.73	0.35	0.88	0.19	0.14	0.00		3.56
Other centres	4.15	1.59	1.04	1.64	3.30	0.78	2.63	0.00		15.13
Outside District Total	39.39	27.67	39.00	16.27	53.13	23.94	41.08	0.27		240.75
TOTAL	172.76	75.82	61.13	20.49	58.97	64.87	46.11	2.68	46.25	549.08

Source: Tables 3B and 4

Table 5C - Future 2022 Comparison Goods Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	172.76	75.82	61.13	20.49	58.97	64.87	46.11	3.08		503.23
Zone 1 - Folkestone	130.61	34.80	13.02	2.21	4.89	39.50	4.70	0.92	40.71	271.38
Zone 2 - Hythe	2.59	13.27	2.75	0.37	0.88	1.04	0.28	0.31	3.79	25.28
Zone 3 - New Romney	0.00	0.08	6.36	1.17	0.06	0.00	0.00	0.00	1.35	9.01
Other in District (Zone 4/6)	0.17	0.00	0.00	0.47	0.00	0.39	0.05	0.00	0.19	1.27
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54	0.27	1.81
District Total	133.37	48.15	22.13	4.22	5.84	40.93	5.03	2.77	46.31	308.75
Rest of study area (outside District)	0.00	0.00	0.00	0.10	0.65	0.00	0.18	0.00		0.94
Ashford	9.67	11.30	29.65	9.02	36.50	6.23	5.58	0.15		108.10
Canterbury	19.00	11.15	3.79	0.86	9.20	14.98	24.62	0.15		83.76
Dover	1.38	0.38	0.12	0.06	0.06	0.97	6.09	0.00		9.06
Central London/West End	1.90	1.29	0.73	0.18	1.00	0.32	0.69	0.00		6.13
Hastings	0.00	0.00	0.37	2.54	0.29	0.13	0.00	0.00		3.33
Bluewater/Intu Lakeside	2.25	1.74	2.32	0.18	1.24	0.32	1.06	0.00		9.12
Rye	0.00	0.00	0.24	1.33	0.00	0.00	0.09	0.00		1.67
Maidstone	1.04	0.23	0.73	0.35	0.88	0.19	0.14	0.00		3.56
Other centres	4.15	1.59	1.04	1.64	3.30	0.78	2.63	0.00		15.13
Outside District Total	39.39	27.67	39.00	16.27	53.13	23.94	41.08	0.31		240.79
TOTAL	172.76	75.82	61.13	20.49	58.97	64.87	46.11	3.08	46.31	549.54

Source: Tables 3C and 4

Table 5D - Future 2022 Comparison Goods Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	172.76	75.82	61.13	20.49	58.97	64.87	46.11	3.57		503.72
Zone 1 - Folkestone	130.61	34.80	13.02	2.21	4.89	39.50	4.70	1.07	40.73	271.55
Zone 2 - Hythe	2.59	13.27	2.75	0.37	0.88	1.04	0.28	0.36	3.80	25.34
Zone 3 - New Romney	0.00	0.08	6.36	1.17	0.06	0.00	0.00	0.00	1.35	9.01
Other in District (Zone 4/6)	0.17	0.00	0.00	0.47	0.00	0.39	0.05	0.00	0.19	1.27
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.79	0.32	2.10
District Total	133.37	48.15	22.13	4.22	5.84	40.93	5.03	3.21	46.39	309.27
Rest of study area (outside District)	0.00	0.00	0.00	0.10	0.65	0.00	0.18	0.00		0.94
Ashford	9.67	11.30	29.65	9.02	36.50	6.23	5.58	0.18		108.12
Canterbury	19.00	11.15	3.79	0.86	9.20	14.98	24.62	0.18		83.78
Dover	1.38	0.38	0.12	0.06	0.06	0.97	6.09	0.00		9.06
Central London/West End	1.90	1.29	0.73	0.18	1.00	0.32	0.69	0.00		6.13
Hastings	0.00	0.00	0.37	2.54	0.29	0.13	0.00	0.00		3.33
Bluewater/Intu Lakeside	2.25	1.74	2.32	0.18	1.24	0.32	1.06	0.00		9.12
Rye	0.00	0.00	0.24	1.33	0.00	0.00	0.09	0.00		1.67
Maidstone	1.04	0.23	0.73	0.35	0.88	0.19	0.14	0.00		3.56
Other centres	4.15	1.59	1.04	1.64	3.30	0.78	2.63	0.00		15.13
Outside District Total	39.39	27.67	39.00	16.27	53.13	23.94	41.08	0.36		240.84
TOTAL	172.76	75.82	61.13	20.49	58.97	64.87	46.11	3.57	46.39	550.12

Source: Tables 3D and 4

Table 6A - Future 2027 Comparison Goods Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	199.79	87.34	70.70	23.96	71.78	75.95	55.19	17.84		602.55
Zone 1 - Folkestone	151.04	40.09	15.06	2.59	5.96	46.25	5.63	5.35	47.99	319.96
Zone 2 - Hythe	3.00	15.28	3.18	0.43	1.08	1.22	0.33	1.78	4.64	30.94
Zone 3 - New Romney	0.00	0.09	7.35	1.37	0.07	0.00	0.00	0.00	1.57	10.44
Other in District (Zone 4/6)	0.20	0.00	0.00	0.55	0.00	0.46	0.06	0.00	0.22	1.48
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.92	1.57	10.49
District Total	154.24	55.46	25.59	4.94	7.11	47.92	6.02	16.06	56.00	373.33
Rest of study area (outside District)	0.00	0.00	0.00	0.12	0.79	0.00	0.22	0.00		1.13
Ashford	11.19	13.01	34.29	10.54	44.43	7.29	6.68	0.89		128.33
Canterbury	21.98	12.84	4.38	1.01	11.20	17.54	29.47	0.89		99.31
Dover	1.60	0.44	0.14	0.07	0.07	1.14	7.28	0.00		10.74
Central London/West End	2.20	1.48	0.85	0.22	1.22	0.38	0.83	0.00		7.17
Hastings	0.00	0.00	0.42	2.97	0.36	0.15	0.00	0.00		3.91
Bluewater/Intu Lakeside	2.60	2.01	2.69	0.22	1.51	0.38	1.27	0.00		10.66
Rye	0.00	0.00	0.28	1.56	0.00	0.00	0.11	0.00		1.95
Maidstone	1.20	0.26	0.85	0.41	1.08	0.23	0.17	0.00		4.19
Other centres	4.79	1.83	1.20	1.92	4.02	0.91	3.15	0.00		17.82
Outside District Total	45.55	31.88	45.11	19.02	64.67	28.02	49.17	1.78		285.22
TOTAL	199.79	87.34	70.70	23.96	71.78	75.95	55.19	17.84	56.00	658.55

Source: Tables 3A and 4

Table 6B - Future 2027 Comparison Goods Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	199.79	87.34	70.70	23.96	71.78	75.95	55.19	20.68		605.39
Zone 1 - Folkestone	151.04	40.09	15.06	2.59	5.96	46.25	5.63	6.21	48.14	320.97
Zone 2 - Hythe	3.00	15.28	3.18	0.43	1.08	1.22	0.33	2.07	4.69	31.28
Zone 3 - New Romney	0.00	0.09	7.35	1.37	0.07	0.00	0.00	0.00	1.57	10.44
Other in District (Zone 4/6)	0.20	0.00	0.00	0.55	0.00	0.46	0.06	0.00	0.22	1.48
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.34	1.83	12.17
District Total	154.24	55.46	25.59	4.94	7.11	47.92	6.02	18.62	56.45	376.34
Rest of study area (outside District)	0.00	0.00	0.00	0.12	0.79	0.00	0.22	0.00		1.13
Ashford	11.19	13.01	34.29	10.54	44.43	7.29	6.68	1.03		128.47
Canterbury	21.98	12.84	4.38	1.01	11.20	17.54	29.47	1.03		99.45
Dover	1.60	0.44	0.14	0.07	0.07	1.14	7.28	0.00		10.74
Central London/West End	2.20	1.48	0.85	0.22	1.22	0.38	0.83	0.00		7.17
Hastings	0.00	0.00	0.42	2.97	0.36	0.15	0.00	0.00		3.91
Bluewater/Intu Lakeside	2.60	2.01	2.69	0.22	1.51	0.38	1.27	0.00		10.66
Rye	0.00	0.00	0.28	1.56	0.00	0.00	0.11	0.00		1.95
Maidstone	1.20	0.26	0.85	0.41	1.08	0.23	0.17	0.00		4.19
Other centres	4.79	1.83	1.20	1.92	4.02	0.91	3.15	0.00		17.82
Outside District Total	45.55	31.88	45.11	19.02	64.67	28.02	49.17	2.07		285.50
TOTAL	199.79	87.34	70.70	23.96	71.78	75.95	55.19	20.68	56.45	661.84

Source: Tables 3B and 4

Table 6C - Future 2027 Comparison Goods Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	199.79	87.34	70.70	23.96	71.78	75.95	55.19	23.79		608.49
Zone 1 - Folkestone	151.04	40.09	15.06	2.59	5.96	46.25	5.63	7.14	48.31	322.06
Zone 2 - Hythe	3.00	15.28	3.18	0.43	1.08	1.22	0.33	2.38	4.75	31.64
Zone 3 - New Romney	0.00	0.09	7.35	1.37	0.07	0.00	0.00	0.00	1.57	10.44
Other in District (Zone 4/6)	0.20	0.00	0.00	0.55	0.00	0.46	0.06	0.00	0.22	1.48
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.89	2.10	13.99
District Total	154.24	55.46	25.59	4.94	7.11	47.92	6.02	21.41	56.94	379.62
Rest of study area (outside District)	0.00	0.00	0.00	0.12	0.79	0.00	0.22	0.00		1.13
Ashford	11.19	13.01	34.29	10.54	44.43	7.29	6.68	1.19		128.62
Canterbury	21.98	12.84	4.38	1.01	11.20	17.54	29.47	1.19		99.61
Dover	1.60	0.44	0.14	0.07	0.07	1.14	7.28	0.00		10.74
Central London/West End	2.20	1.48	0.85	0.22	1.22	0.38	0.83	0.00		7.17
Hastings	0.00	0.00	0.42	2.97	0.36	0.15	0.00	0.00		3.91
Bluewater/Intu Lakeside	2.60	2.01	2.69	0.22	1.51	0.38	1.27	0.00		10.66
Rye	0.00	0.00	0.28	1.56	0.00	0.00	0.11	0.00		1.95
Maidstone	1.20	0.26	0.85	0.41	1.08	0.23	0.17	0.00		4.19
Other centres	4.79	1.83	1.20	1.92	4.02	0.91	3.15	0.00		17.82
Outside District Total	45.55	31.88	45.11	19.02	64.67	28.02	49.17	2.38		285.81
TOTAL	199.79	87.34	70.70	23.96	71.78	75.95	55.19	23.79	56.94	665.43

Source: Tables 3C and 4

Table 6D - Future 2027 Comparison Goods Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	199.79	87.34	70.70	23.96	71.78	75.95	55.19	27.58		612.28
Zone 1 - Folkestone	151.04	40.09	15.06	2.59	5.96	46.25	5.63	8.27	48.51	323.40
Zone 2 - Hythe	3.00	15.28	3.18	0.43	1.08	1.22	0.33	2.76	4.81	32.09
Zone 3 - New Romney	0.00	0.09	7.35	1.37	0.07	0.00	0.00	0.00	1.57	10.44
Other in District (Zone 4/6)	0.20	0.00	0.00	0.55	0.00	0.46	0.06	0.00	0.22	1.48
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.79	2.43	16.22
District Total	154.24	55.46	25.59	4.94	7.11	47.92	6.02	24.82	57.55	383.64
Rest of study area (outside District)	0.00	0.00	0.00	0.12	0.79	0.00	0.22	0.00		1.13
Ashford	11.19	13.01	34.29	10.54	44.43	7.29	6.68	1.38		128.81
Canterbury	21.98	12.84	4.38	1.01	11.20	17.54	29.47	1.38		99.80
Dover	1.60	0.44	0.14	0.07	0.07	1.14	7.28	0.00		10.74
Central London/West End	2.20	1.48	0.85	0.22	1.22	0.38	0.83	0.00		7.17
Hastings	0.00	0.00	0.42	2.97	0.36	0.15	0.00	0.00		3.91
Bluewater/Intu Lakeside	2.60	2.01	2.69	0.22	1.51	0.38	1.27	0.00		10.66
Rye	0.00	0.00	0.28	1.56	0.00	0.00	0.11	0.00		1.95
Maidstone	1.20	0.26	0.85	0.41	1.08	0.23	0.17	0.00		4.19
Other centres	4.79	1.83	1.20	1.92	4.02	0.91	3.15	0.00		17.82
Outside District Total	45.55	31.88	45.11	19.02	64.67	28.02	49.17	2.76		286.19
TOTAL	199.79	87.34	70.70	23.96	71.78	75.95	55.19	27.58	57.55	669.83

Source: Tables 3D and 4

Table 7A - Future 2032 Comparison Goods Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	233.18	101.01	82.07	28.10	87.06	89.18	66.60	39.88		727.09
Zone 1 - Folkestone	176.29	46.37	17.48	3.03	7.23	54.31	6.79	11.97	57.08	380.54
Zone 2 - Hythe	3.50	17.68	3.69	0.51	1.31	1.43	0.40	3.99	5.73	38.23
Zone 3 - New Romney	0.00	0.10	8.54	1.60	0.09	0.00	0.00	0.00	1.82	12.15
Other in District (Zone 4/6)	0.23	0.00	0.00	0.65	0.00	0.54	0.07	0.00	0.26	1.74
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.94	3.52	23.46
District Total	180.02	64.14	29.71	5.79	8.62	56.27	7.26	35.90	68.42	456.12
Rest of study area (outside District)	0.00	0.00	0.00	0.14	0.96	0.00	0.27	0.00		1.36
Ashford	13.06	15.05	39.80	12.36	53.89	8.56	8.06	1.99		152.78
Canterbury	25.65	14.85	5.09	1.18	13.58	20.60	35.56	1.99		118.51
Dover	1.87	0.51	0.16	0.08	0.09	1.34	8.79	0.00		12.83
Central London/West End	2.57	1.72	0.98	0.25	1.48	0.45	1.00	0.00		8.44
Hastings	0.00	0.00	0.49	3.48	0.44	0.18	0.00	0.00		4.59
Bluewater/Intu Lakeside	3.03	2.32	3.12	0.25	1.83	0.45	1.53	0.00		12.53
Rye	0.00	0.00	0.33	1.83	0.00	0.00	0.13	0.00		2.29
Maidstone	1.40	0.30	0.98	0.48	1.31	0.27	0.20	0.00		4.94
Other centres	5.60	2.12	1.40	2.25	4.88	1.07	3.80	0.00		21.10
Outside District Total	53.17	36.87	52.36	22.31	78.44	32.91	59.34	3.99		339.39
TOTAL	233.18	101.01	82.07	28.10	87.06	89.18	66.60	39.88	68.42	795.51

Source: Tables 3A and 4

Table 7B - Future 2032 Comparison Goods Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	233.18	101.01	82.07	28.10	87.06	89.18	66.60	46.23		733.44
Zone 1 - Folkestone	176.29	46.37	17.48	3.03	7.23	54.31	6.79	13.87	57.42	382.78
Zone 2 - Hythe	3.50	17.68	3.69	0.51	1.31	1.43	0.40	4.62	5.85	38.98
Zone 3 - New Romney	0.00	0.10	8.54	1.60	0.09	0.00	0.00	0.00	1.82	12.15
Other in District (Zone 4/6)	0.23	0.00	0.00	0.65	0.00	0.54	0.07	0.00	0.26	1.74
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	23.12	4.08	27.20
District Total	180.02	64.14	29.71	5.79	8.62	56.27	7.26	41.61	69.43	462.85
Rest of study area (outside District)	0.00	0.00	0.00	0.14	0.96	0.00	0.27	0.00		1.36
Ashford	13.06	15.05	39.80	12.36	53.89	8.56	8.06	2.31		153.10
Canterbury	25.65	14.85	5.09	1.18	13.58	20.60	35.56	2.31		118.83
Dover	1.87	0.51	0.16	0.08	0.09	1.34	8.79	0.00		12.83
Central London/West End	2.57	1.72	0.98	0.25	1.48	0.45	1.00	0.00		8.44
Hastings	0.00	0.00	0.49	3.48	0.44	0.18	0.00	0.00		4.59
Bluewater/Intu Lakeside	3.03	2.32	3.12	0.25	1.83	0.45	1.53	0.00		12.53
Rye	0.00	0.00	0.33	1.83	0.00	0.00	0.13	0.00		2.29
Maidstone	1.40	0.30	0.98	0.48	1.31	0.27	0.20	0.00		4.94
Other centres	5.60	2.12	1.40	2.25	4.88	1.07	3.80	0.00		21.10
Outside District Total	53.17	36.87	52.36	22.31	78.44	32.91	59.34	4.62		340.02
TOTAL	233.18	101.01	82.07	28.10	87.06	89.18	66.60	46.23	69.43	802.87

Source: Tables 3B and 4

Table 7C - Future 2032 Comparison Goods Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	233.18	101.01	82.07	28.10	87.06	89.18	66.60	53.18		740.39
Zone 1 - Folkestone	176.29	46.37	17.48	3.03	7.23	54.31	6.79	15.96	57.79	385.24
Zone 2 - Hythe	3.50	17.68	3.69	0.51	1.31	1.43	0.40	5.32	5.97	39.79
Zone 3 - New Romney	0.00	0.10	8.54	1.60	0.09	0.00	0.00	0.00	1.82	12.15
Other in District (Zone 4/6)	0.23	0.00	0.00	0.65	0.00	0.54	0.07	0.00	0.26	1.74
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.59	4.69	31.28
District Total	180.02	64.14	29.71	5.79	8.62	56.27	7.26	47.87	70.53	470.21
Rest of study area (outside District)	0.00	0.00	0.00	0.14	0.96	0.00	0.27	0.00		1.36
Ashford	13.06	15.05	39.80	12.36	53.89	8.56	8.06	2.66		153.45
Canterbury	25.65	14.85	5.09	1.18	13.58	20.60	35.56	2.66		119.17
Dover	1.87	0.51	0.16	0.08	0.09	1.34	8.79	0.00		12.83
Central London/West End	2.57	1.72	0.98	0.25	1.48	0.45	1.00	0.00		8.44
Hastings	0.00	0.00	0.49	3.48	0.44	0.18	0.00	0.00		4.59
Bluewater/Intu Lakeside	3.03	2.32	3.12	0.25	1.83	0.45	1.53	0.00		12.53
Rye	0.00	0.00	0.33	1.83	0.00	0.00	0.13	0.00		2.29
Maidstone	1.40	0.30	0.98	0.48	1.31	0.27	0.20	0.00		4.94
Other centres	5.60	2.12	1.40	2.25	4.88	1.07	3.80	0.00		21.10
Outside District Total	53.17	36.87	52.36	22.31	78.44	32.91	59.34	5.32		340.71
TOTAL	233.18	101.01	82.07	28.10	87.06	89.18	66.60	53.18	70.53	810.92

Source: Tables 3C and 4

Table 7D - Future 2032 Comparison Goods Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	233.18	101.01	82.07	28.10	87.06	89.18	66.60	61.64		748.85
Zone 1 - Folkestone	176.29	46.37	17.48	3.03	7.23	54.31	6.79	18.49	58.23	388.22
Zone 2 - Hythe	3.50	17.68	3.69	0.51	1.31	1.43	0.40	6.16	6.12	40.79
Zone 3 - New Romney	0.00	0.10	8.54	1.60	0.09	0.00	0.00	0.00	1.82	12.15
Other in District (Zone 4/6)	0.23	0.00	0.00	0.65	0.00	0.54	0.07	0.00	0.26	1.74
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.82	5.44	36.26
District Total	180.02	64.14	29.71	5.79	8.62	56.27	7.26	55.48	71.87	479.16
Rest of study area (outside District)	0.00	0.00	0.00	0.14	0.96	0.00	0.27	0.00		1.36
Ashford	13.06	15.05	39.80	12.36	53.89	8.56	8.06	3.08		153.87
Canterbury	25.65	14.85	5.09	1.18	13.58	20.60	35.56	3.08		119.60
Dover	1.87	0.51	0.16	0.08	0.09	1.34	8.79	0.00		12.83
Central London/West End	2.57	1.72	0.98	0.25	1.48	0.45	1.00	0.00		8.44
Hastings	0.00	0.00	0.49	3.48	0.44	0.18	0.00	0.00		4.59
Bluewater/Intu Lakeside	3.03	2.32	3.12	0.25	1.83	0.45	1.53	0.00		12.53
Rye	0.00	0.00	0.33	1.83	0.00	0.00	0.13	0.00		2.29
Maidstone	1.40	0.30	0.98	0.48	1.31	0.27	0.20	0.00		4.94
Other centres	5.60	2.12	1.40	2.25	4.88	1.07	3.80	0.00		21.10
Outside District Total	53.17	36.87	52.36	22.31	78.44	32.91	59.34	6.16		341.56
TOTAL	233.18	101.01	82.07	28.10	87.06	89.18	66.60	61.64	71.87	820.72

Source: Tables 3D and 4

Table 8A - Future 2037 Comparison Goods Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	271.99	116.24	94.78	32.84	105.24	104.12	80.14	71.02		876.36
Zone 1 - Folkestone	205.62	53.35	20.19	3.55	8.73	63.41	8.17	21.31	67.82	452.16
Zone 2 - Hythe	4.08	20.34	4.27	0.59	1.58	1.67	0.48	7.10	7.08	47.18
Zone 3 - New Romney	0.00	0.12	9.86	1.87	0.11	0.00	0.00	0.00	2.11	14.06
Other in District (Zone 4/6)	0.27	0.00	0.00	0.76	0.00	0.62	0.08	0.00	0.31	2.04
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	35.51	6.27	41.78
District Total	209.98	73.81	34.31	6.76	10.42	65.70	8.74	63.92	83.58	557.22
Rest of study area (outside District)	0.00	0.00	0.00	0.16	1.16	0.00	0.32	0.00		1.64
Ashford	15.23	17.32	45.97	14.45	65.14	10.00	9.70	3.55		181.35
Canterbury	29.92	17.09	5.88	1.38	16.42	24.05	42.79	3.55		141.08
Dover	2.18	0.58	0.19	0.10	0.11	1.56	10.58	0.00		15.29
Central London/West End	2.99	1.98	1.14	0.30	1.79	0.52	1.20	0.00		9.91
Hastings	0.00	0.00	0.57	4.07	0.53	0.21	0.00	0.00		5.37
Bluewater/Intu Lakeside	3.54	2.67	3.60	0.30	2.21	0.52	1.84	0.00		14.68
Rye	0.00	0.00	0.38	2.13	0.00	0.00	0.16	0.00		2.67
Maidstone	1.63	0.35	1.14	0.56	1.58	0.31	0.24	0.00		5.81
Other centres	6.53	2.44	1.61	2.63	5.89	1.25	4.57	0.00		24.92
Outside District Total	62.01	42.43	60.47	26.07	94.82	38.42	71.40	7.10		402.73
TOTAL	271.99	116.24	94.78	32.84	105.24	104.12	80.14	71.02	83.58	959.94

Source: Tables 3A and 4

Table 8B - Future 2037 Comparison Goods Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	271.99	116.24	94.78	32.84	105.24	104.12	80.14	82.32		887.66
Zone 1 - Folkestone	205.62	53.35	20.19	3.55	8.73	63.41	8.17	24.70	68.42	456.15
Zone 2 - Hythe	4.08	20.34	4.27	0.59	1.58	1.67	0.48	8.23	7.28	48.51
Zone 3 - New Romney	0.00	0.12	9.86	1.87	0.11	0.00	0.00	0.00	2.11	14.06
Other in District (Zone 4/6)	0.27	0.00	0.00	0.76	0.00	0.62	0.08	0.00	0.31	2.04
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.16	7.26	48.43
District Total	209.98	73.81	34.31	6.76	10.42	65.70	8.74	74.09	85.38	569.18
Rest of study area (outside District)	0.00	0.00	0.00	0.16	1.16	0.00	0.32	0.00		1.64
Ashford	15.23	17.32	45.97	14.45	65.14	10.00	9.70	4.12		181.92
Canterbury	29.92	17.09	5.88	1.38	16.42	24.05	42.79	4.12		141.64
Dover	2.18	0.58	0.19	0.10	0.11	1.56	10.58	0.00		15.29
Central London/West End	2.99	1.98	1.14	0.30	1.79	0.52	1.20	0.00		9.91
Hastings	0.00	0.00	0.57	4.07	0.53	0.21	0.00	0.00		5.37
Bluewater/Intu Lakeside	3.54	2.67	3.60	0.30	2.21	0.52	1.84	0.00		14.68
Rye	0.00	0.00	0.38	2.13	0.00	0.00	0.16	0.00		2.67
Maidstone	1.63	0.35	1.14	0.56	1.58	0.31	0.24	0.00		5.81
Other centres	6.53	2.44	1.61	2.63	5.89	1.25	4.57	0.00		24.92
Outside District Total	62.01	42.43	60.47	26.07	94.82	38.42	71.40	8.23		403.86
TOTAL	271.99	116.24	94.78	32.84	105.24	104.12	80.14	82.32	85.38	973.04

Source: Tables 3B and 4

Table 8C - Future 2037 Comparison Goods Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	271.99	116.24	94.78	32.84	105.24	104.12	80.14	94.69		900.04
Zone 1 - Folkestone	205.62	53.35	20.19	3.55	8.73	63.41	8.17	28.41	69.08	460.52
Zone 2 - Hythe	4.08	20.34	4.27	0.59	1.58	1.67	0.48	9.47	7.50	49.97
Zone 3 - New Romney	0.00	0.12	9.86	1.87	0.11	0.00	0.00	0.00	2.11	14.06
Other in District (Zone 4/6)	0.27	0.00	0.00	0.76	0.00	0.62	0.08	0.00	0.31	2.04
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.35	8.36	55.70
District Total	209.98	73.81	34.31	6.76	10.42	65.70	8.74	85.23	87.34	582.28
Rest of study area (outside District)	0.00	0.00	0.00	0.16	1.16	0.00	0.32	0.00		1.64
Ashford	15.23	17.32	45.97	14.45	65.14	10.00	9.70	4.73		182.54
Canterbury	29.92	17.09	5.88	1.38	16.42	24.05	42.79	4.73		142.26
Dover	2.18	0.58	0.19	0.10	0.11	1.56	10.58	0.00		15.29
Central London/West End	2.99	1.98	1.14	0.30	1.79	0.52	1.20	0.00		9.91
Hastings	0.00	0.00	0.57	4.07	0.53	0.21	0.00	0.00		5.37
Bluewater/Intu Lakeside	3.54	2.67	3.60	0.30	2.21	0.52	1.84	0.00		14.68
Rye	0.00	0.00	0.38	2.13	0.00	0.00	0.16	0.00		2.67
Maidstone	1.63	0.35	1.14	0.56	1.58	0.31	0.24	0.00		5.81
Other centres	6.53	2.44	1.61	2.63	5.89	1.25	4.57	0.00		24.92
Outside District Total	62.01	42.43	60.47	26.07	94.82	38.42	71.40	9.47		405.09
TOTAL	271.99	116.24	94.78	32.84	105.24	104.12	80.14	94.69	87.34	987.38

Source: Tables 3C and 4

Table 8D - Future 2037 Comparison Goods Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	271.99	116.24	94.78	32.84	105.24	104.12	80.14	109.76		915.10
Zone 1 - Folkestone	205.62	53.35	20.19	3.55	8.73	63.41	8.17	32.93	69.88	465.83
Zone 2 - Hythe	4.08	20.34	4.27	0.59	1.58	1.67	0.48	10.98	7.76	51.74
Zone 3 - New Romney	0.00	0.12	9.86	1.87	0.11	0.00	0.00	0.00	2.11	14.06
Other in District (Zone 4/6)	0.27	0.00	0.00	0.76	0.00	0.62	0.08	0.00	0.31	2.04
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	54.88	9.68	64.56
District Total	209.98	73.81	34.31	6.76	10.42	65.70	8.74	98.78	89.74	598.24
Rest of study area (outside District)	0.00	0.00	0.00	0.16	1.16	0.00	0.32	0.00		1.64
Ashford	15.23	17.32	45.97	14.45	65.14	10.00	9.70	5.49		183.29
Canterbury	29.92	17.09	5.88	1.38	16.42	24.05	42.79	5.49		143.01
Dover	2.18	0.58	0.19	0.10	0.11	1.56	10.58	0.00		15.29
Central London/West End	2.99	1.98	1.14	0.30	1.79	0.52	1.20	0.00		9.91
Hastings	0.00	0.00	0.57	4.07	0.53	0.21	0.00	0.00		5.37
Bluewater/Intu Lakeside	3.54	2.67	3.60	0.30	2.21	0.52	1.84	0.00		14.68
Rye	0.00	0.00	0.38	2.13	0.00	0.00	0.16	0.00		2.67
Maidstone	1.63	0.35	1.14	0.56	1.58	0.31	0.24	0.00		5.81
Other centres	6.53	2.44	1.61	2.63	5.89	1.25	4.57	0.00		24.92
Outside District Total	62.01	42.43	60.47	26.07	94.82	38.42	71.40	10.98		406.60
TOTAL	271.99	116.24	94.78	32.84	105.24	104.12	80.14	109.76	89.74	1,004.84

Source: Tables 3D and 4

Table 9A - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - Scenario 1

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	243.04	271.11	319.96	380.54	452.16
Zone 2 - Hythe	22.45	25.19	30.94	38.23	47.18
Zone 3 - New Romney	8.08	9.01	10.44	12.15	14.06
Other in District (Zone 4/6)	1.13	1.27	1.48	1.74	2.04
Otterpool Park	0.00	1.36	10.49	23.46	41.78
Total	274.70	307.93	373.33	456.12	557.22
Benchmark Turnover of Existing Facilities					
Zone 1 - Folkestone	243.04	266.96	304.99	341.72	382.86
Zone 2 - Hythe	22.45	24.66	28.18	31.57	35.37
Zone 3 - New Romney	8.08	8.87	10.14	11.36	12.73
Other in District (Zone 4/6)	1.13	1.25	1.42	1.59	1.79
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	274.70	301.74	344.73	386.24	432.75
Surplus Expenditure (£m)					
Zone 1 - Folkestone	0.00	4.15	14.97	38.83	69.30
Zone 2 - Hythe	0.00	0.53	2.77	6.66	11.81
Zone 3 - New Romney	0.00	0.14	0.31	0.79	1.33
Other in District (Zone 4/6)	0.00	0.02	0.06	0.15	0.25
Otterpool Park	0.00	1.36	10.49	23.46	41.78
Total	0.00	6.20	28.60	69.88	124.47

Source: Tables 5, 6A to 8A

Table 9B - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - Scenario 2

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	243.04	271.24	320.97	382.78	456.15
Zone 2 - Hythe	22.45	25.23	31.28	38.98	48.51
Zone 3 - New Romney	8.08	9.01	10.44	12.15	14.06
Other in District (Zone 4/6)	1.13	1.27	1.48	1.74	2.04
Otterpool Park	0.00	1.58	12.17	27.20	48.43
Total	274.70	308.33	376.34	462.85	569.18
Benchmark Turnover of Existing Facilities					
Zone 1 - Folkestone	243.04	266.96	304.99	341.72	382.86
Zone 2 - Hythe	22.45	24.66	28.18	31.57	35.37
Zone 3 - New Romney	8.08	8.87	10.14	11.36	12.73
Other in District (Zone 4/6)	1.13	1.25	1.42	1.59	1.79
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	274.70	301.74	344.73	386.24	432.75
Surplus Expenditure (£m)					
Zone 1 - Folkestone	0.00	4.28	15.97	41.07	73.29
Zone 2 - Hythe	0.00	0.57	3.10	7.41	13.14
Zone 3 - New Romney	0.00	0.14	0.31	0.79	1.33
Other in District (Zone 4/6)	0.00	0.02	0.06	0.15	0.25
Otterpool Park	0.00	1.58	12.17	27.20	48.43
Total	0.00	6.59	31.61	76.61	136.44

Source: Tables 5, 6B to 8B

Table 9C - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - Scenario 3

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	243.04	271.38	322.06	385.24	460.52
Zone 2 - Hythe	22.45	25.28	31.64	39.79	49.97
Zone 3 - New Romney	8.08	9.01	10.44	12.15	14.06
Other in District (Zone 4/6)	1.13	1.27	1.48	1.74	2.04
Otterpool Park	0.00	1.81	13.99	31.28	55.70
Total	274.70	308.75	379.62	470.21	582.28
Benchmark Turnover of Existing Facilities					
Zone 1 - Folkestone	243.04	266.96	304.99	341.72	382.86
Zone 2 - Hythe	22.45	24.66	28.18	31.57	35.37
Zone 3 - New Romney	8.08	8.87	10.14	11.36	12.73
Other in District (Zone 4/6)	1.13	1.25	1.42	1.59	1.79
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	274.70	301.74	344.73	386.24	432.75
Surplus Expenditure (£m)					
Zone 1 - Folkestone	0.00	4.42	17.07	43.52	77.65
Zone 2 - Hythe	0.00	0.62	3.47	8.22	14.60
Zone 3 - New Romney	0.00	0.14	0.31	0.79	1.33
Other in District (Zone 4/6)	0.00	0.02	0.06	0.15	0.25
Otterpool Park	0.00	1.81	13.99	31.28	55.70
Total	0.00	7.01	34.89	83.97	149.54

Source: Tables 5, 6C to 8C

Table 9D - Summary of Comparison Goods Expenditure 2018 to 2037 (£M) - Scenario 4

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	243.04	271.55	323.40	388.22	465.83
Zone 2 - Hythe	22.45	25.34	32.09	40.79	51.74
Zone 3 - New Romney	8.08	9.01	10.44	12.15	14.06
Other in District (Zone 4/6)	1.13	1.27	1.48	1.74	2.04
Otterpool Park	0.00	2.10	16.22	36.26	64.56
Total	274.70	309.27	383.64	479.16	598.24
Benchmark Turnover of Existing Facilities					
Zone 1 - Folkestone	243.04	266.96	304.99	341.72	382.86
Zone 2 - Hythe	22.45	24.66	28.18	31.57	35.37
Zone 3 - New Romney	8.08	8.87	10.14	11.36	12.73
Other in District (Zone 4/6)	1.13	1.25	1.42	1.59	1.79
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	274.70	301.74	344.73	386.24	432.75
Surplus Expenditure (£m)					
Zone 1 - Folkestone	0.00	4.60	18.41	46.51	82.97
Zone 2 - Hythe	0.00	0.67	3.91	9.22	16.37
Zone 3 - New Romney	0.00	0.14	0.31	0.79	1.33
Other in District (Zone 4/6)	0.00	0.02	0.06	0.15	0.25
Otterpool Park	0.00	2.10	16.22	36.26	64.56
Total	0.00	7.53	38.91	92.92	165.49

Source: Tables 5, 6D to 8D

Table 10A - Comparison Goods Floorspace Capacity up to 2037 - Scenario 1

	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,591	£7,530	£8,436	£9,452
Floorspace Projection (sq.m net)					
Zone 1 - Folkestone	0	630	1,988	4,603	7,332
Zone 2 - Hythe	0	80	367	789	1,250
Zone 3 - New Romney	0	21	41	93	141
Other in District (Zone 4/6)	0	4	8	18	27
Otterpool Park	0	206	1,394	2,781	4,420
Total	0	940	3,798	8,284	13,169
Floorspace Projection (sq.m gross)					
Zone 1 - Folkestone	0	840	2,651	6,137	9,775
Zone 2 - Hythe	0	106	490	1,053	1,666
Zone 3 - New Romney	0	28	54	124	188
Other in District (Zone 4/6)	0	5	11	23	35
Otterpool Park	0	275	1,858	3,708	5,893
Total	0	1,253	5,064	11,045	17,558

Source: Table 9A

Table 10B - Comparison Goods Floorspace Capacity up to 2037 - Scenario 2

	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,591	£7,530	£8,436	£9,452
Floorspace Projection (sq.m net)					
Zone 1 - Folkestone	0	650	2,122	4,868	7,754
Zone 2 - Hythe	0	86	412	878	1,390
Zone 3 - New Romney	0	21	41	93	141
Other in District (Zone 4/6)	0	4	8	18	27
Otterpool Park	0	239	1,616	3,224	5,123
Total	0	1,000	4,198	9,081	14,435
Floorspace Projection (sq.m gross)					
Zone 1 - Folkestone	0	866	2,829	6,491	10,338
Zone 2 - Hythe	0	115	549	1,171	1,854
Zone 3 - New Romney	0	28	54	124	188
Other in District (Zone 4/6)	0	5	11	23	35
Otterpool Park	0	319	2,155	4,298	6,831
Total	0	1,333	5,597	12,108	19,246

Source: Table 9B

Table 10C - Comparison Goods Floorspace Capacity up to 2037 - Scenario 3

	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,591	£7,530	£8,436	£9,452
Floorspace Projection (sq.m net)					
Zone 1 - Folkestone	0	671	2,267	5,159	8,216
Zone 2 - Hythe	0	93	460	975	1,544
Zone 3 - New Romney	0	21	41	93	141
Other in District (Zone 4/6)	0	4	8	18	27
Otterpool Park	0	275	1,858	3,708	5,893
Total	0	1,064	4,634	9,953	15,821
Floorspace Projection (sq.m gross)					
Zone 1 - Folkestone	0	895	3,023	6,879	10,954
Zone 2 - Hythe	0	125	614	1,300	2,059
Zone 3 - New Romney	0	28	54	124	188
Other in District (Zone 4/6)	0	5	11	23	35
Otterpool Park	0	366	2,478	4,944	7,858
Total	0	1,418	6,179	13,271	21,094

Source: Table 9C

Table 10D - Comparison Goods Floorspace Capacity up to 2037 - Scenario 4

	2018	2022	2027	2032	2037
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,591	£7,530	£8,436	£9,452
Floorspace Projection (sq.m net)					
Zone 1 - Folkestone	0	697	2,445	5,513	8,778
Zone 2 - Hythe	0	102	519	1,093	1,732
Zone 3 - New Romney	0	21	41	93	141
Other in District (Zone 4/6)	0	4	8	18	27
Otterpool Park	0	319	2,154	4,298	6,831
Total	0	1,143	5,167	11,015	17,508
Floorspace Projection (sq.m gross)					
Zone 1 - Folkestone	0	930	3,260	7,350	11,704
Zone 2 - Hythe	0	136	693	1,457	2,309
Zone 3 - New Romney	0	28	54	124	188
Other in District (Zone 4/6)	0	5	11	23	35
Otterpool Park	0	425	2,872	5,731	9,108
Total	0	1,524	6,890	14,686	23,344

Source: Table 9D

Appendix 4: Food and beverage capacity

Table 1A Population - Scenario 1: Core Strategy delivery at low density (5,500 dwellings at 2.1 people per dwelling)

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 Population - Scenario 2: Otterpool Masterplan delivery at low density (6,375 dwellings at 2.1 people per dwelling)

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 1C Population - Scenario 3: Core Strategy delivery at high density (5,500 dwellings at 2.8 people per dwelling)

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	784	5,253	10,086	15,400
Total	130,933	134,834	140,870	146,746	152,550

Sources:

Experian MMG 3 Population Projections 2016
 Otterpool Park Masterplan phasing - 2.8 people per dwelling
 2022 = 280 dwellings (784 people)
 2027 = 1,876 dwellings (5,253 people)
 2032 = 3,602 dwellings (10,086 people)
 2037 = 5,500 dwellings (15,400 people)

Table 1D Population - Scenario 4: Otterpool Masterplan delivery at high density (6,375 dwellings at 2.8 people per dwelling)

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	910	6,090	11,690	17,850
Total	130,933	134,960	141,707	148,350	155,000

Sources:

Experian MMG 3 Population Projections 2016 - Lichfields adjustments for Otterpool Park
 Otterpool Park Masterplan phasing (Table 9.1 Planning and Delivery Statement) - 2.8 people per dwelling
 2022 = 325 dwellings (910 people)
 2027 = 2,175 dwellings (4,568 people)
 2032 = 4,175 dwellings (11,690 people)
 2037 = 6,375 dwellings (17,850 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	1,007	1,055	1,120	1,189	1,262
Zone 2 - Hythe	1,256	1,316	1,397	1,483	1,574
Zone 3 - New Romney & Dymchurch	1,087	1,139	1,209	1,284	1,362
Zone 4 - Lydd	947	992	1,053	1,118	1,187
Zone 5 - Sellinge & Ashford fringes	1,241	1,300	1,380	1,465	1,555
Zone 6 - Hawkinge, Lyminge & Capel	1,201	1,258	1,335	1,417	1,505
Zone 7 - Rural north and Dover fringes	1,295	1,357	1,440	1,529	1,623
Otterpool Park	1,148	1,202	1,276	1,355	1,438

Sources:

Experian Local Expenditure 2016 (2016 prices)

Experian Retail Planner Briefing Note 16 (December 2018)

Table 3A - Total Food and Beverage Expenditure (£m) - Scenario 1: Core Strategy delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	53.01	56.62	60.26	64.12	68.06
Zone 2 - Hythe	23.05	24.52	25.99	27.40	28.70
Zone 3 - New Romney & Dymchurch	18.14	19.45	20.70	21.91	23.02
Zone 4 - Lydd	6.03	6.52	7.01	7.50	7.98
Zone 5 - Sellinge & Ashford fringes	15.46	16.89	18.92	20.92	23.01
Zone 6 - Hawkinge, Lyminge & Capel	17.96	19.33	20.82	22.29	23.70
Zone 7 - Rural north and Dover fringes	12.26	13.23	14.57	16.02	17.55
Otterpool Park	0.00	0.71	5.03	10.25	16.61
Study Area Total	145.91	157.26	173.30	190.40	208.63

Source: Tables 1A and 2

Table 3B - Total Food and Beverage Expenditure (£m) - Scenario 2: Otterpool Masterplan delivery at low density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	53.01	56.62	60.26	64.12	68.06
Zone 2 - Hythe	23.05	24.52	25.99	27.40	28.70
Zone 3 - New Romney & Dymchurch	18.14	19.45	20.70	21.91	23.02
Zone 4 - Lydd	6.03	6.52	7.01	7.50	7.98
Zone 5 - Sellinge & Ashford fringes	15.46	16.89	18.92	20.92	23.01
Zone 6 - Hawkinge, Lyminge & Capel	17.96	19.33	20.82	22.29	23.70
Zone 7 - Rural north and Dover fringes	12.26	13.23	14.57	16.02	17.55
Otterpool Park	0.00	0.82	5.83	11.88	19.25
Study Area Total	145.91	157.37	174.11	192.04	211.28

Source: Tables 1B and 2

Table 3C - Total Food and Beverage Expenditure (£m) - Scenario 2: Core Strategy delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	53.01	56.62	60.26	64.12	68.06
Zone 2 - Hythe	23.05	24.52	25.99	27.40	28.70
Zone 3 - New Romney & Dymchurch	18.14	19.45	20.70	21.91	23.02
Zone 4 - Lydd	6.03	6.52	7.01	7.50	7.98
Zone 5 - Sellinge & Ashford fringes	15.46	16.89	18.92	20.92	23.01
Zone 6 - Hawkinge, Lyminge & Capel	17.96	19.33	20.82	22.29	23.70
Zone 7 - Rural north and Dover fringes	12.26	13.23	14.57	16.02	17.55
Otterpool Park	0.00	0.94	6.70	13.67	22.15
Study Area Total	145.91	157.49	174.98	193.82	214.17

Source: Tables 1C and 2

Table 3D - Total Food and Beverage Expenditure (£m) - Scenario 4: Otterpool Masterplan delivery at high density

Zone	2018	2022	2027	2032	2037
Zone 1 - Folkestone	53.01	56.62	60.26	64.12	68.06
Zone 2 - Hythe	23.05	24.52	25.99	27.40	28.70
Zone 3 - New Romney & Dymchurch	18.14	19.45	20.70	21.91	23.02
Zone 4 - Lydd	6.03	6.52	7.01	7.50	7.98
Zone 5 - Sellinge & Ashford fringes	15.46	16.89	18.92	20.92	23.01
Zone 6 - Hawkinge, Lyminge & Capel	17.96	19.33	20.82	22.29	23.70
Zone 7 - Rural north and Dover fringes	12.26	13.23	14.57	16.02	17.55
Otterpool Park	0.00	1.09	7.77	15.84	25.67
Study Area Total	145.91	157.65	176.05	196.00	217.69

Source: Tables 1D 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	53.01	23.05	18.14	6.03	15.46	17.96	12.26	0.00		145.91
Zone 1 - Folkestone	39.49	2.51	2.23	0.26	0.48	7.62	0.59	0.00	5.91	59.09
Zone 2 - Hythe	3.18	15.33	2.50	0.17	0.87	2.17	0.23	0.00	2.72	27.17
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	4.30	3.92	1.85	0.00	1.56	15.62
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
District Total	44.05	18.41	13.32	1.85	5.78	13.70	2.71	0.00	11.09	110.92
Ashford	2.97	1.24	2.92	1.50	6.46	0.48	0.83	0.00		16.41
Canterbury	2.86	1.80	0.20	0.13	0.97	2.80	5.19	0.00		13.96
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	1.07	0.00	0.04	0.00		2.14
Dover	0.80	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		7.32
Outside Study Area Total	8.96	4.63	4.83	4.18	9.68	4.26	9.55	0.00		46.08
TOTAL	53.01	23.05	18.14	6.03	15.46	17.96	12.26	0.00	11.09	157.01

Source: Tables 3A and 4

Table 6A - Future 2022 Food/Beverage Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.71		157.26
Zone 1 - Folkestone	42.18	2.67	2.39	0.28	0.52	8.20	0.63	0.07	6.33	63.28
Zone 2 - Hythe	3.40	16.30	2.68	0.18	0.95	2.34	0.25	0.07	2.91	29.08
Zone 3 - New Romney	0.17	0.00	7.51	0.87	0.15	0.00	0.04	0.00	0.97	9.70
Other in District (Zone 4/6)	1.30	0.61	1.69	0.67	4.69	4.21	2.00	0.00	1.69	16.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.05	0.55
District Total	47.05	19.59	14.27	2.00	6.32	14.75	2.92	0.64	11.95	119.49
Ashford	3.17	1.32	3.13	1.62	7.06	0.52	0.90	0.04		17.76
Canterbury	3.06	1.91	0.21	0.14	1.06	3.02	5.60	0.04		15.04
Rye	0.00	0.07	0.49	2.08	0.37	0.00	0.36	0.00		3.37
Tenterden	0.00	0.44	0.64	0.03	1.17	0.00	0.04	0.00		2.31
Dover	0.85	0.15	0.00	0.00	0.00	0.54	1.31	0.00		2.85
Hastings	0.00	0.00	0.25	0.27	0.00	0.00	0.00	0.00		0.53
Other Outside District	2.49	1.03	0.45	0.38	0.91	0.50	2.10	0.00		7.86
Outside Study Area Total	9.57	4.93	5.17	4.52	10.57	4.58	10.30	0.07		49.72
TOTAL	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.71	11.95	169.21

Source: Tables 3A and 4

Table 6B - Future 2022 Food/Beverage Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.82		157.37
Zone 1 - Folkestone	42.18	2.67	2.39	0.28	0.52	8.20	0.63	0.08	6.33	63.29
Zone 2 - Hythe	3.40	16.30	2.68	0.18	0.95	2.34	0.25	0.08	2.91	29.09
Zone 3 - New Romney	0.17	0.00	7.51	0.87	0.15	0.00	0.04	0.00	0.97	9.70
Other in District (Zone 4/6)	1.30	0.61	1.69	0.67	4.69	4.21	2.00	0.00	1.69	16.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	0.06	0.64
District Total	47.05	19.59	14.27	2.00	6.32	14.75	2.92	0.74	11.96	119.60
Ashford	3.17	1.32	3.13	1.62	7.06	0.52	0.90	0.04		17.76
Canterbury	3.06	1.91	0.21	0.14	1.06	3.02	5.60	0.04		15.04
Rye	0.00	0.07	0.49	2.08	0.37	0.00	0.36	0.00		3.37
Tenterden	0.00	0.44	0.64	0.03	1.17	0.00	0.04	0.00		2.31
Dover	0.85	0.15	0.00	0.00	0.00	0.54	1.31	0.00		2.85
Hastings	0.00	0.00	0.25	0.27	0.00	0.00	0.00	0.00		0.53
Other Outside District	2.49	1.03	0.45	0.38	0.91	0.50	2.10	0.00		7.86
Outside Study Area Total	9.57	4.93	5.17	4.52	10.57	4.58	10.30	0.08		49.73
TOTAL	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.82	11.96	169.33

Source: Tables 3B and 4

Table 6C - Future 2022 Food/Beverage Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.94		157.49
Zone 1 - Folkestone	42.18	2.67	2.39	0.28	0.52	8.20	0.63	0.09	6.33	63.31
Zone 2 - Hythe	3.40	16.30	2.68	0.18	0.95	2.34	0.25	0.09	2.91	29.11
Zone 3 - New Romney	0.17	0.00	7.51	0.87	0.15	0.00	0.04	0.00	0.97	9.70
Other in District (Zone 4/6)	1.30	0.61	1.69	0.67	4.69	4.21	2.00	0.00	1.69	16.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.66	0.07	0.73
District Total	47.05	19.59	14.27	2.00	6.32	14.75	2.92	0.85	11.97	119.73
Ashford	3.17	1.32	3.13	1.62	7.06	0.52	0.90	0.05		17.77
Canterbury	3.06	1.91	0.21	0.14	1.06	3.02	5.60	0.05		15.05
Rye	0.00	0.07	0.49	2.08	0.37	0.00	0.36	0.00		3.37
Tenterden	0.00	0.44	0.64	0.03	1.17	0.00	0.04	0.00		2.31
Dover	0.85	0.15	0.00	0.00	0.00	0.54	1.31	0.00		2.85
Hastings	0.00	0.00	0.25	0.27	0.00	0.00	0.00	0.00		0.53
Other Outside District	2.49	1.03	0.45	0.38	0.91	0.50	2.10	0.00		7.86
Outside Study Area Total	9.57	4.93	5.17	4.52	10.57	4.58	10.30	0.09		49.74
TOTAL	56.62	24.52	19.45	6.52	16.89	19.33	13.23	0.94	11.97	169.47

Source: Tables 3C and 4

Table 6D - Future 2022 Food/Beverage Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2022	56.62	24.52	19.45	6.52	16.89	19.33	13.23	1.09		157.65
Zone 1 - Folkestone	42.18	2.67	2.39	0.28	0.52	8.20	0.63	0.11	6.33	63.33
Zone 2 - Hythe	3.40	16.30	2.68	0.18	0.95	2.34	0.25	0.11	2.91	29.12
Zone 3 - New Romney	0.17	0.00	7.51	0.87	0.15	0.00	0.04	0.00	0.97	9.70
Other in District (Zone 4/6)	1.30	0.61	1.69	0.67	4.69	4.21	2.00	0.00	1.69	16.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.09	0.85
District Total	47.05	19.59	14.27	2.00	6.32	14.75	2.92	0.98	11.99	119.88
Ashford	3.17	1.32	3.13	1.62	7.06	0.52	0.90	0.05		17.78
Canterbury	3.06	1.91	0.21	0.14	1.06	3.02	5.60	0.05		15.06
Rye	0.00	0.07	0.49	2.08	0.37	0.00	0.36	0.00		3.37
Tenterden	0.00	0.44	0.64	0.03	1.17	0.00	0.04	0.00		2.31
Dover	0.85	0.15	0.00	0.00	0.00	0.54	1.31	0.00		2.85
Hastings	0.00	0.00	0.25	0.27	0.00	0.00	0.00	0.00		0.53
Other Outside District	2.49	1.03	0.45	0.38	0.91	0.50	2.10	0.00		7.86
Outside Study Area Total	9.57	4.93	5.17	4.52	10.57	4.58	10.30	0.11		49.76
TOTAL	56.62	24.52	19.45	6.52	16.89	19.33	13.23	1.09	11.99	169.63

Source: Tables 3D and 4

Table 7A - Future 2027 Food/Beverage Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	60.26	25.99	20.70	7.01	18.92	20.82	14.57	5.03		173.30
Zone 1 - Folkestone	44.90	2.83	2.55	0.30	0.59	8.83	0.70	0.50	6.80	68.00
Zone 2 - Hythe	3.62	17.29	2.86	0.20	1.06	2.52	0.28	0.50	3.15	31.46
Zone 3 - New Romney	0.18	0.00	7.99	0.93	0.17	0.00	0.04	0.00	1.04	10.35
Other in District (Zone 4/6)	1.39	0.65	1.80	0.72	5.26	4.54	2.20	0.00	1.84	18.40
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.52	0.39	3.91
District Total	50.08	20.77	15.19	2.15	7.08	15.89	3.22	4.52	13.21	132.11
Ashford	3.37	1.40	3.33	1.74	7.91	0.56	0.99	0.25		19.56
Canterbury	3.25	2.03	0.23	0.15	1.19	3.25	6.16	0.25		16.52
Rye	0.00	0.08	0.52	2.24	0.42	0.00	0.39	0.00		3.64
Tenterden	0.00	0.47	0.68	0.03	1.31	0.00	0.04	0.00		2.53
Dover	0.90	0.16	0.00	0.00	0.00	0.58	1.44	0.00		3.08
Hastings	0.00	0.00	0.27	0.29	0.00	0.00	0.00	0.00		0.56
Other Outside District	2.65	1.09	0.48	0.41	1.02	0.54	2.32	0.00		8.51
Outside Study Area Total	10.18	5.22	5.51	4.86	11.84	4.94	11.35	0.50		54.40
TOTAL	60.26	25.99	20.70	7.01	18.92	20.82	14.57	5.03	13.21	186.52

Source: Tables 3A and 4

Table 7B - Future 2027 Food/Beverage Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	60.26	25.99	20.70	7.01	18.92	20.82	14.57	5.83		174.11
Zone 1 - Folkestone	44.90	2.83	2.55	0.30	0.59	8.83	0.70	0.58	6.81	68.08
Zone 2 - Hythe	3.62	17.29	2.86	0.20	1.06	2.52	0.28	0.58	3.15	31.55
Zone 3 - New Romney	0.18	0.00	7.99	0.93	0.17	0.00	0.04	0.00	1.04	10.35
Other in District (Zone 4/6)	1.39	0.65	1.80	0.72	5.26	4.54	2.20	0.00	1.84	18.40
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.08	0.45	4.53
District Total	50.08	20.77	15.19	2.15	7.08	15.89	3.22	5.25	13.29	132.91
Ashford	3.37	1.40	3.33	1.74	7.91	0.56	0.99	0.29		19.60
Canterbury	3.25	2.03	0.23	0.15	1.19	3.25	6.16	0.29		16.56
Rye	0.00	0.08	0.52	2.24	0.42	0.00	0.39	0.00		3.64
Tenterden	0.00	0.47	0.68	0.03	1.31	0.00	0.04	0.00		2.53
Dover	0.90	0.16	0.00	0.00	0.00	0.58	1.44	0.00		3.08
Hastings	0.00	0.00	0.27	0.29	0.00	0.00	0.00	0.00		0.56
Other Outside District	2.65	1.09	0.48	0.41	1.02	0.54	2.32	0.00		8.51
Outside Study Area Total	10.18	5.22	5.51	4.86	11.84	4.94	11.35	0.58		54.48
TOTAL	60.26	25.99	20.70	7.01	18.92	20.82	14.57	5.83	13.29	187.40

Source: Tables 3B and 4

Table 7C - Future 2027 Food/Beverage Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	60.26	25.99	20.70	7.01	18.92	20.82	14.57	6.70		174.98
Zone 1 - Folkestone	44.90	2.83	2.55	0.30	0.59	8.83	0.70	0.67	6.82	68.18
Zone 2 - Hythe	3.62	17.29	2.86	0.20	1.06	2.52	0.28	0.67	3.16	31.65
Zone 3 - New Romney	0.18	0.00	7.99	0.93	0.17	0.00	0.04	0.00	1.04	10.35
Other in District (Zone 4/6)	1.39	0.65	1.80	0.72	5.26	4.54	2.20	0.00	1.84	18.40
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.69	0.52	5.21
District Total	50.08	20.77	15.19	2.15	7.08	15.89	3.22	6.03	13.38	133.79
Ashford	3.37	1.40	3.33	1.74	7.91	0.56	0.99	0.34		19.65
Canterbury	3.25	2.03	0.23	0.15	1.19	3.25	6.16	0.34		16.60
Rye	0.00	0.08	0.52	2.24	0.42	0.00	0.39	0.00		3.64
Tenterden	0.00	0.47	0.68	0.03	1.31	0.00	0.04	0.00		2.53
Dover	0.90	0.16	0.00	0.00	0.00	0.58	1.44	0.00		3.08
Hastings	0.00	0.00	0.27	0.29	0.00	0.00	0.00	0.00		0.56
Other Outside District	2.65	1.09	0.48	0.41	1.02	0.54	2.32	0.00		8.51
Outside Study Area Total	10.18	5.22	5.51	4.86	11.84	4.94	11.35	0.67		54.57
TOTAL	60.26	25.99	20.70	7.01	18.92	20.82	14.57	6.70	13.38	188.36

Source: Tables 3C and 4

Table 7D - Future 2027 Food/Beverage Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2027	60.26	25.99	20.70	7.01	18.92	20.82	14.57	7.77		176.05
Zone 1 - Folkestone	44.90	2.83	2.55	0.30	0.59	8.83	0.70	0.78	6.83	68.30
Zone 2 - Hythe	3.62	17.29	2.86	0.20	1.06	2.52	0.28	0.78	3.18	31.76
Zone 3 - New Romney	0.18	0.00	7.99	0.93	0.17	0.00	0.04	0.00	1.04	10.35
Other in District (Zone 4/6)	1.39	0.65	1.80	0.72	5.26	4.54	2.20	0.00	1.84	18.40
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.44	0.60	6.04
District Total	50.08	20.77	15.19	2.15	7.08	15.89	3.22	6.99	13.49	134.86
Ashford	3.37	1.40	3.33	1.74	7.91	0.56	0.99	0.39		19.70
Canterbury	3.25	2.03	0.23	0.15	1.19	3.25	6.16	0.39		16.65
Rye	0.00	0.08	0.52	2.24	0.42	0.00	0.39	0.00		3.64
Tenterden	0.00	0.47	0.68	0.03	1.31	0.00	0.04	0.00		2.53
Dover	0.90	0.16	0.00	0.00	0.00	0.58	1.44	0.00		3.08
Hastings	0.00	0.00	0.27	0.29	0.00	0.00	0.00	0.00		0.56
Other Outside District	2.65	1.09	0.48	0.41	1.02	0.54	2.32	0.00		8.51
Outside Study Area Total	10.18	5.22	5.51	4.86	11.84	4.94	11.35	0.78		54.68
TOTAL	60.26	25.99	20.70	7.01	18.92	20.82	14.57	7.77	13.49	189.53

Source: Tables 3D and 4

Table 8A - Future 2032 Food/Beverage Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	64.12	27.40	21.91	7.50	20.92	22.29	16.02	10.25		190.40
Zone 1 - Folkestone	47.77	2.99	2.69	0.32	0.65	9.45	0.77	1.02	7.30	72.96
Zone 2 - Hythe	3.85	18.22	3.02	0.21	1.17	2.70	0.30	1.02	3.39	33.89
Zone 3 - New Romney	0.19	0.00	8.46	1.00	0.19	0.00	0.05	0.00	1.10	10.98
Other in District (Zone 4/6)	1.47	0.69	1.91	0.77	5.81	4.86	2.42	0.00	1.99	19.92
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.17	0.80	7.97
District Total	53.28	21.89	16.08	2.30	7.82	17.00	3.54	9.22	14.57	145.73
Ashford	3.59	1.48	3.53	1.86	8.74	0.60	1.09	0.51		21.40
Canterbury	3.46	2.14	0.24	0.16	1.32	3.48	6.78	0.51		18.09
Rye	0.00	0.08	0.55	2.39	0.46	0.00	0.43	0.00		3.92
Tenterden	0.00	0.49	0.72	0.03	1.44	0.00	0.05	0.00		2.74
Dover	0.96	0.16	0.00	0.00	0.00	0.62	1.59	0.00		3.34
Hastings	0.00	0.00	0.28	0.31	0.00	0.00	0.00	0.00		0.60
Other Outside District	2.82	1.15	0.50	0.43	1.13	0.58	2.55	0.00		9.17
Outside Study Area Total	10.84	5.51	5.83	5.20	13.09	5.28	12.48	1.02		59.25
TOTAL	64.12	27.40	21.91	7.50	20.92	22.29	16.02	10.25	14.57	204.98

Source: Tables 3A and 4

Table 8B - Future 2032 Food/Beverage Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	64.12	27.40	21.91	7.50	20.92	22.29	16.02	11.88		192.04
Zone 1 - Folkestone	47.77	2.99	2.69	0.32	0.65	9.45	0.77	1.19	7.31	73.14
Zone 2 - Hythe	3.85	18.22	3.02	0.21	1.17	2.70	0.30	1.19	3.41	34.07
Zone 3 - New Romney	0.19	0.00	8.46	1.00	0.19	0.00	0.05	0.00	1.10	10.98
Other in District (Zone 4/6)	1.47	0.69	1.91	0.77	5.81	4.86	2.42	0.00	1.99	19.92
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.32	0.92	9.24
District Total	53.28	21.89	16.08	2.30	7.82	17.00	3.54	10.69	14.74	147.36
Ashford	3.59	1.48	3.53	1.86	8.74	0.60	1.09	0.59		21.49
Canterbury	3.46	2.14	0.24	0.16	1.32	3.48	6.78	0.59		18.17
Rye	0.00	0.08	0.55	2.39	0.46	0.00	0.43	0.00		3.92
Tenterden	0.00	0.49	0.72	0.03	1.44	0.00	0.05	0.00		2.74
Dover	0.96	0.16	0.00	0.00	0.00	0.62	1.59	0.00		3.34
Hastings	0.00	0.00	0.28	0.31	0.00	0.00	0.00	0.00		0.60
Other Outside District	2.82	1.15	0.50	0.43	1.13	0.58	2.55	0.00		9.17
Outside Study Area Total	10.84	5.51	5.83	5.20	13.09	5.28	12.48	1.19		59.41
TOTAL	64.12	27.40	21.91	7.50	20.92	22.29	16.02	11.88	14.74	206.77

Source: Tables 3B and 4

Table 8C - Future 2032 Food/Beverage Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	64.12	27.40	21.91	7.50	20.92	22.29	16.02	13.67		193.82
Zone 1 - Folkestone	47.77	2.99	2.69	0.32	0.65	9.45	0.77	1.37	7.33	73.34
Zone 2 - Hythe	3.85	18.22	3.02	0.21	1.17	2.70	0.30	1.37	3.43	34.27
Zone 3 - New Romney	0.19	0.00	8.46	1.00	0.19	0.00	0.05	0.00	1.10	10.98
Other in District (Zone 4/6)	1.47	0.69	1.91	0.77	5.81	4.86	2.42	0.00	1.99	19.92
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.57	1.06	10.63
District Total	53.28	21.89	16.08	2.30	7.82	17.00	3.54	12.30	14.91	149.14
Ashford	3.59	1.48	3.53	1.86	8.74	0.60	1.09	0.68		21.57
Canterbury	3.46	2.14	0.24	0.16	1.32	3.48	6.78	0.68		18.26
Rye	0.00	0.08	0.55	2.39	0.46	0.00	0.43	0.00		3.92
Tenterden	0.00	0.49	0.72	0.03	1.44	0.00	0.05	0.00		2.74
Dover	0.96	0.16	0.00	0.00	0.00	0.62	1.59	0.00		3.34
Hastings	0.00	0.00	0.28	0.31	0.00	0.00	0.00	0.00		0.60
Other Outside District	2.82	1.15	0.50	0.43	1.13	0.58	2.55	0.00		9.17
Outside Study Area Total	10.84	5.51	5.83	5.20	13.09	5.28	12.48	1.37		59.59
TOTAL	64.12	27.40	21.91	7.50	20.92	22.29	16.02	13.67	14.91	208.74

Source: Tables 3C and 4

Table 8D - Future 2032 Food/Beverage Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2032	64.12	27.40	21.91	7.50	20.92	22.29	16.02	15.84		196.00
Zone 1 - Folkestone	47.77	2.99	2.69	0.32	0.65	9.45	0.77	1.58	7.36	73.58
Zone 2 - Hythe	3.85	18.22	3.02	0.21	1.17	2.70	0.30	1.58	3.45	34.51
Zone 3 - New Romney	0.19	0.00	8.46	1.00	0.19	0.00	0.05	0.00	1.10	10.98
Other in District (Zone 4/6)	1.47	0.69	1.91	0.77	5.81	4.86	2.42	0.00	1.99	19.92
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.09	1.23	12.32
District Total	53.28	21.89	16.08	2.30	7.82	17.00	3.54	14.26	15.13	151.32
Ashford	3.59	1.48	3.53	1.86	8.74	0.60	1.09	0.79		21.68
Canterbury	3.46	2.14	0.24	0.16	1.32	3.48	6.78	0.79		18.37
Rye	0.00	0.08	0.55	2.39	0.46	0.00	0.43	0.00		3.92
Tenterden	0.00	0.49	0.72	0.03	1.44	0.00	0.05	0.00		2.74
Dover	0.96	0.16	0.00	0.00	0.00	0.62	1.59	0.00		3.34
Hastings	0.00	0.00	0.28	0.31	0.00	0.00	0.00	0.00		0.60
Other Outside District	2.82	1.15	0.50	0.43	1.13	0.58	2.55	0.00		9.17
Outside Study Area Total	10.84	5.51	5.83	5.20	13.09	5.28	12.48	1.58		59.81
TOTAL	64.12	27.40	21.91	7.50	20.92	22.29	16.02	15.84	15.13	211.13

Source: Tables 3D and 4

Table 9A - Future 2037 Food/Beverage Expenditure Patterns (£M) - Scenario 1

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	68.06	28.70	23.02	7.98	23.01	23.70	17.55	16.61		208.63
Zone 1 - Folkestone	50.71	3.13	2.83	0.34	0.71	10.05	0.84	1.66	7.81	78.08
Zone 2 - Hythe	4.08	19.09	3.18	0.22	1.29	2.87	0.33	1.66	3.64	36.36
Zone 3 - New Romney	0.20	0.00	8.88	1.06	0.21	0.00	0.05	0.00	1.16	11.57
Other in District (Zone 4/6)	1.57	0.72	2.00	0.82	6.40	5.17	2.65	0.00	2.15	21.47
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.63	1.29	12.92
District Total	56.56	22.93	16.89	2.45	8.61	18.08	3.88	14.95	16.04	160.39
Ashford	3.81	1.55	3.71	1.98	9.62	0.64	1.19	0.83		23.33
Canterbury	3.68	2.24	0.25	0.18	1.45	3.70	7.42	0.83		19.74
Rye	0.00	0.09	0.58	2.55	0.51	0.00	0.47	0.00		4.19
Tenterden	0.00	0.52	0.76	0.03	1.59	0.00	0.05	0.00		2.95
Dover	1.02	0.17	0.00	0.00	0.00	0.66	1.74	0.00		3.59
Hastings	0.00	0.00	0.30	0.34	0.00	0.00	0.00	0.00		0.63
Other Outside District	2.99	1.21	0.53	0.46	1.24	0.62	2.79	0.00		9.84
Outside Study Area Total	11.50	5.77	6.12	5.53	14.41	5.62	13.67	1.66		64.28
TOTAL	68.06	28.70	23.02	7.98	23.01	23.70	17.55	16.61	16.04	224.67

Source: Tables 3A and 4

Table 9B - Future 2037 Food/Beverage Expenditure Patterns (£M) - Scenario 2

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	68.06	28.70	23.02	7.98	23.01	23.70	17.55	19.25		211.28
Zone 1 - Folkestone	50.71	3.13	2.83	0.34	0.71	10.05	0.84	1.93	7.84	78.38
Zone 2 - Hythe	4.08	19.09	3.18	0.22	1.29	2.87	0.33	1.93	3.66	36.65
Zone 3 - New Romney	0.20	0.00	8.88	1.06	0.21	0.00	0.05	0.00	1.16	11.57
Other in District (Zone 4/6)	1.57	0.72	2.00	0.82	6.40	5.17	2.65	0.00	2.15	21.47
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.48	1.50	14.97
District Total	56.56	22.93	16.89	2.45	8.61	18.08	3.88	17.33	16.30	163.03
Ashford	3.81	1.55	3.71	1.98	9.62	0.64	1.19	0.96		23.46
Canterbury	3.68	2.24	0.25	0.18	1.45	3.70	7.42	0.96		19.88
Rye	0.00	0.09	0.58	2.55	0.51	0.00	0.47	0.00		4.19
Tenterden	0.00	0.52	0.76	0.03	1.59	0.00	0.05	0.00		2.95
Dover	1.02	0.17	0.00	0.00	0.00	0.66	1.74	0.00		3.59
Hastings	0.00	0.00	0.30	0.34	0.00	0.00	0.00	0.00		0.63
Other Outside District	2.99	1.21	0.53	0.46	1.24	0.62	2.79	0.00		9.84
Outside Study Area Total	11.50	5.77	6.12	5.53	14.41	5.62	13.67	1.93		64.55
TOTAL	68.06	28.70	23.02	7.98	23.01	23.70	17.55	19.25	16.30	227.58

Source: Tables 3B and 4

Table 9C - Future 2037 Food/Beverage Expenditure Patterns (£M) - Scenario 3

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	68.06	28.70	23.02	7.98	23.01	23.70	17.55	22.15		214.17
Zone 1 - Folkestone	50.71	3.13	2.83	0.34	0.71	10.05	0.84	2.21	7.87	78.70
Zone 2 - Hythe	4.08	19.09	3.18	0.22	1.29	2.87	0.33	2.21	3.70	36.97
Zone 3 - New Romney	0.20	0.00	8.88	1.06	0.21	0.00	0.05	0.00	1.16	11.57
Other in District (Zone 4/6)	1.57	0.72	2.00	0.82	6.40	5.17	2.65	0.00	2.15	21.47
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.50	1.72	17.22
District Total	56.56	22.93	16.89	2.45	8.61	18.08	3.88	19.93	16.59	165.93
Ashford	3.81	1.55	3.71	1.98	9.62	0.64	1.19	1.11		23.61
Canterbury	3.68	2.24	0.25	0.18	1.45	3.70	7.42	1.11		20.02
Rye	0.00	0.09	0.58	2.55	0.51	0.00	0.47	0.00		4.19
Tenterden	0.00	0.52	0.76	0.03	1.59	0.00	0.05	0.00		2.95
Dover	1.02	0.17	0.00	0.00	0.00	0.66	1.74	0.00		3.59
Hastings	0.00	0.00	0.30	0.34	0.00	0.00	0.00	0.00		0.63
Other Outside District	2.99	1.21	0.53	0.46	1.24	0.62	2.79	0.00		9.84
Outside Study Area Total	11.50	5.77	6.12	5.53	14.41	5.62	13.67	2.21		64.83
TOTAL	68.06	28.70	23.02	7.98	23.01	23.70	17.55	22.15	16.59	230.76

Source: Tables 3C and 4

Table 9D - Future 2037 Food/Beverage Expenditure Patterns (£M) - Scenario 4

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Otterpool Park	Inflow	Total
Expenditure 2037	68.06	28.70	23.02	7.98	23.01	23.70	17.55	25.67		217.69
Zone 1 - Folkestone	50.71	3.13	2.83	0.34	0.71	10.05	0.84	2.57	7.91	79.09
Zone 2 - Hythe	4.08	19.09	3.18	0.22	1.29	2.87	0.33	2.57	3.74	37.36
Zone 3 - New Romney	0.20	0.00	8.88	1.06	0.21	0.00	0.05	0.00	1.16	11.57
Other in District (Zone 4/6)	1.57	0.72	2.00	0.82	6.40	5.17	2.65	0.00	2.15	21.47
Otterpool Park	0.00	0.00	0.00	0.00	0.00	0.00	0.00	17.97	2.00	19.96
District Total	56.56	22.93	16.89	2.45	8.61	18.08	3.88	23.10	16.95	169.45
Ashford	3.81	1.55	3.71	1.98	9.62	0.64	1.19	1.28		23.78
Canterbury	3.68	2.24	0.25	0.18	1.45	3.70	7.42	1.28		20.20
Rye	0.00	0.09	0.58	2.55	0.51	0.00	0.47	0.00		4.19
Tenterden	0.00	0.52	0.76	0.03	1.59	0.00	0.05	0.00		2.95
Dover	1.02	0.17	0.00	0.00	0.00	0.66	1.74	0.00		3.59
Hastings	0.00	0.00	0.30	0.34	0.00	0.00	0.00	0.00		0.63
Other Outside District	2.99	1.21	0.53	0.46	1.24	0.62	2.79	0.00		9.84
Outside Study Area Total	11.50	5.77	6.12	5.53	14.41	5.62	13.67	2.57		65.19
TOTAL	68.06	28.70	23.02	7.98	23.01	23.70	17.55	25.67	16.95	234.64

Source: Tables 3D and 4

Table 10A - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - Scenario 1

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	59.09	63.28	68.00	72.96	78.08
Zone 2 - Hythe	27.17	29.08	31.46	33.89	36.36
Zone 3 - New Romney	9.04	9.70	10.35	10.98	11.57
Other in District (Zone 4/6)	15.62	16.87	18.40	19.92	21.47
Otterpool Park	0.00	0.55	3.91	7.97	12.92
Total	110.92	119.49	132.11	145.73	160.39
Benchmark turnover of existing facilities					
Zone 1 - Folkestone	59.09	61.49	64.62	67.92	71.38
Zone 2 - Hythe	27.17	28.27	29.71	31.23	32.82
Zone 3 - New Romney	9.04	9.41	9.89	10.40	10.93
Other in District (Zone 4/6)	15.62	16.26	17.09	17.96	18.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	110.92	115.43	121.31	127.50	134.01

Source: Table 5, 6A to 9A

Table 10B - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - Scenario 2

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	59.09	63.29	68.08	73.14	78.38
Zone 2 - Hythe	27.17	29.09	31.55	34.07	36.65
Zone 3 - New Romney	9.04	9.70	10.35	10.98	11.57
Other in District (Zone 4/6)	15.62	16.87	18.40	19.92	21.47
Otterpool Park	0.00	0.64	4.53	9.24	14.97
Total	110.92	119.60	132.91	147.36	163.03
Benchmark turnover of existing facilities					
Zone 1 - Folkestone	59.09	61.49	64.62	67.92	71.38
Zone 2 - Hythe	27.17	28.27	29.71	31.23	32.82
Zone 3 - New Romney	9.04	9.41	9.89	10.40	10.93
Other in District (Zone 4/6)	15.62	16.26	17.09	17.96	18.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	110.92	115.43	121.31	127.50	134.01

Table 10C - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - Scenario 3

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	59.09	63.31	68.18	73.34	78.70
Zone 2 - Hythe	27.17	29.11	31.65	34.27	36.97
Zone 3 - New Romney	9.04	9.70	10.35	10.98	11.57
Other in District (Zone 4/6)	15.62	16.87	18.40	19.92	21.47
Otterpool Park	0.00	0.73	5.21	10.63	17.22
Total	110.92	119.73	133.79	149.14	165.93
Benchmark turnover of existing facilities					
Zone 1 - Folkestone	59.09	61.49	64.62	67.92	71.38
Zone 2 - Hythe	27.17	28.27	29.71	31.23	32.82
Zone 3 - New Romney	9.04	9.41	9.89	10.40	10.93
Other in District (Zone 4/6)	15.62	16.26	17.09	17.96	18.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	110.92	115.43	121.31	127.50	134.01

Source: Table 5, 6C to 9C

Table 10D - Summary of Food and Beverage Expenditure 2018 to 2037 (£M) - Scenario 4

Area	2018	2022	2027	2032	2037
Available Expenditure					
Zone 1 - Folkestone	59.09	63.33	68.30	73.58	79.09
Zone 2 - Hythe	27.17	29.12	31.76	34.51	37.36
Zone 3 - New Romney	9.04	9.70	10.35	10.98	11.57
Other in District (Zone 4/6)	15.62	16.87	18.40	19.92	21.47
Otterpool Park	0.00	0.85	6.04	12.32	19.96
Total	110.92	119.88	134.86	151.32	169.45
Benchmark turnover of existing facilities					
Zone 1 - Folkestone	59.09	61.49	64.62	67.92	71.38
Zone 2 - Hythe	27.17	28.27	29.71	31.23	32.82
Zone 3 - New Romney	9.04	9.41	9.89	10.40	10.93
Other in District (Zone 4/6)	15.62	16.26	17.09	17.96	18.87
Otterpool Park	0.00	0.00	0.00	0.00	0.00
Total	110.92	115.43	121.31	127.50	134.01

Source: Table 5, 6D to 9D

Table 11A - Food and Beverage Floorspace Capacity up to 2037 - Scenario 1

	2018	2022	2027	2032	2037
Surplus/Deficit Expenditure (£m)					
Zone 1 - Folkestone	0.00	1.80	3.37	5.04	6.70
Zone 2 - Hythe	0.00	0.81	1.75	2.66	3.53
Zone 3 - New Romney	0.00	0.29	0.46	0.58	0.64
Other in District (Zone 4/6)	0.00	0.62	1.31	1.97	2.60
Otterpool Park	0.00	0.55	3.91	7.97	12.92
TOTAL	0.00	4.06	10.80	18.22	26.39
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	345	617	877	1,109
Zone 2 - Hythe	0	156	319	463	585
Zone 3 - New Romney	0	56	84	102	106
Other in District (Zone 4/6)	0	118	240	342	430
Otterpool Park	0	106	715	1,387	2,139
TOTAL	0	781	1,975	3,171	4,368

Source: Table 10A

Table 11B - Food and Beverage Floorspace Capacity up to 2037 - Scenario 2

	2018	2022	2027	2032	2037
Surplus/Deficit Expenditure (£m)					
Zone 1 - Folkestone	0.00	1.81	3.46	5.22	6.99
Zone 2 - Hythe	0.00	0.82	1.83	2.84	3.83
Zone 3 - New Romney	0.00	0.29	0.46	0.58	0.64
Other in District (Zone 4/6)	0.00	0.62	1.31	1.97	2.60
Otterpool Park	0.00	0.64	4.53	9.24	14.97
TOTAL	0.00	4.18	11.60	19.85	29.03
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	347	633	909	1,158
Zone 2 - Hythe	0	158	336	494	634
Zone 3 - New Romney	0	56	84	102	106
Other in District (Zone 4/6)	0	118	240	342	430
Otterpool Park	0	123	829	1,608	2,479
TOTAL	0	803	2,121	3,455	4,806

Source: Table 10B

Table 11C - Food and Beverage Floorspace Capacity up to 2037 - Scenario 3

	2018	2022	2027	2032	2037
Surplus/Deficit Expenditure (£m)					
Zone 1 - Folkestone	0.00	1.82	3.56	5.42	7.31
Zone 2 - Hythe	0.00	0.84	1.93	3.04	4.15
Zone 3 - New Romney	0.00	0.29	0.46	0.58	0.64
Other in District (Zone 4/6)	0.00	0.62	1.31	1.97	2.60
Otterpool Park	0.00	0.73	5.21	10.63	17.22
TOTAL	0.00	4.30	12.47	21.64	31.92
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	350	651	943	1,211
Zone 2 - Hythe	0	161	353	529	687
Zone 3 - New Romney	0	56	84	102	106
Other in District (Zone 4/6)	0	118	240	342	430
Otterpool Park	0	141	953	1,849	2,851
TOTAL	0	826	2,281	3,765	5,285

Source: Table 10C

Table 11D - Food and Beverage Floorspace Capacity up to 2037 - Scenario 4

	2018	2022	2027	2032	2037
Surplus/Deficit Expenditure (£m)					
Zone 1 - Folkestone	0.00	1.84	3.68	5.66	7.71
Zone 2 - Hythe	0.00	0.85	2.05	3.28	4.54
Zone 3 - New Romney	0.00	0.29	0.46	0.58	0.64
Other in District (Zone 4/6)	0.00	0.62	1.31	1.97	2.60
Otterpool Park	0.00	0.85	6.04	12.32	19.96
TOTAL	0.00	4.45	13.54	23.81	35.44
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	353	672	985	1,276
Zone 2 - Hythe	0	164	375	571	752
Zone 3 - New Romney	0	56	84	102	106
Other in District (Zone 4/6)	0	118	240	342	430
Otterpool Park	0	164	1,105	2,144	3,305
TOTAL	0	856	2,476	4,143	5,868

Source: Table 10D

Bristol

0117 403 1980
bristol@lichfields.uk

Cardiff

029 2043 5880
cardiff@lichfields.uk

Edinburgh

0131 285 0670
edinburgh@lichfields.uk

Leeds

0113 397 1397
leeds@lichfields.uk

London

020 7837 4477
london@lichfields.uk

Manchester

0161 837 6130
manchester@lichfields.uk

Newcastle

0191 261 5685
newcastle@lichfields.uk

Thames Valley

0118 334 1920
thamesvalley@lichfields.uk