Appendix 3

Retail and Leisure Operator Requirements

A3 COMMERCIAL LEISURE CAPACITY AND DEMAND

Introduction

A3.1 This section assesses the capacity and potential demand for commercial leisure development in Tonbridge town centre. We have considered the potential for improving a range of commercial leisure uses including; cinema/multiplex, ten pin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

A3.2 The approach for assessing the capacity for commercial leisure development in Tonbridge is less sophisticated than for the retail capacity assessment reflecting the fact that there is a less clear relationship between population and spending and provision of facilities and that operator demand is usually the key factor.

A3.3 For the assessment of the capacity for cinema provision within Tonbridge a catchment area capacity exercise has been carried out. However, for other uses the approach has been to focus on identifying existing and committed provision within and around the potential catchment area and then exploring demand with operators as this will be a key determinant of whether leisure may be attracted.

Commercial Leisure Trends

A3.4 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980's and again in the mid 1990's. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey). Average household expenditure on leisure services increased by a further 36% between 1995 and 2001. The latest (2001-2002) average household expenditure on leisure services is over £2,700 per annum. However, many analysts consider that the commercial leisure market has reached saturation in some sub-sectors.

A3.5 On average households in the South East spent over £330 per annum on sports admissions and leisure fees (source: Family Expenditure Survey), compared with the national average of £260 per annum, as shown in Table 12.1.

Table A3.1: Household Expenditure on Selected Leisure Services (2001-02)

	Average Annual Expenditure Per Household	
	South East Region	**UK**
Sports admissions and leisure fees	£333	£260
Cinema, theatres and museums etc.	£114	£88
Restaurants, café meals and drinks	£1,066	£1,030

Source: Family Expenditure Survey

A3.6 The mid-1990s saw the expansion of major *leisure parks.* These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health and fitness clubs, themed destination restaurants, pub/restaurants, nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks.

A3.7 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years , in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas. With the deregulation of casinos this sector is likely to be a growth area in the short term.

The Potential for Leisure and Entertainment Uses

Catchment Potential

A3.8 In general, commercial leisure facilities will draw the main part of their trade from residents within a 20 minutes drive time, particularly in areas with a reasonably high car ownership such as Tonbridge.

A3.9 Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together on a large out of centre leisure parks.

A3.10 Tonbridge has (potentially) a reasonably large catchment population. There are around 60,500 people within the defined study area. However, this catchment population has good access to major leisure facilities in nearby larger towns, such as Tunbridge Wells and Maidstone. The proximity of major leisure facilities in these surrounding large towns will limit the catchment area and potential for major leisure facilities within Tonbridge.

The Cinema Market

A3.11 Cinema admissions in the UK declined steadily during the 1950's, 1960's and 1970's, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980's, but have increased steadily since 1984. Total admissions in 2002 were 176 million, the highest figure since 1971. The annual average growth in admissions since 1990 has been 5% per annum.

A3.12 Since 1990 the number of cinemas has decreased from 737 to 668 sites, but the number of screens has increased from 1,685 to 3,258, a growth rate of 5.6% per annum. Multiplex cinemas now dominate the market with nearly 68% of available screens in 2002. The number of annual admissions was 54,000 visits per screen in 2002.

A3.13 The UK cinema industry is now in a period of consolidation after this rapid growth during the 1990's. Dodona research predicts that the growth in admissions will slow over the next few years. Total admissions are expected to increase to 195 million by 2007, (Cinemagoing 11), an average growth rate of 2.1% per annum. Operators' plans for new cinemas are at a very low level. However, despite the current slowdown in development JHD advisors predict that the number of screens will increase by 800 by 2010, and admissions will reach 230 million.

A3.14 Cinema provision in Tonbridge town centre is limited, with only a small selection of films shown on Wednesday and Thursday evenings at the Angel Centre in Tonbridge town centre. However, there is a reasonable provision of multiplex cinemas in surrounding towns including Maidstone, Sevenoaks and Tunbridge Wells. The cinema in Tunbridge Wells is to the north of the town centre, just off the A21 towards Tonbridge. The close proximity of the cinema in Tunbridge Wells will impact on the demand for a multiplex cinema in Tonbridge. The catchment area of a cinema facility within Tonbridge town centre will be restricted by the proximity of these major multiplexes.

A3.15 The current and future demand for cinema admissions within the study area has been assessed, using national visitation rates and applying these to the resident market population in the study area. Dodona's national forecasts for visits per person from 2001 to 2007 have been adopted. Growth in visits per person beyond 2007 have been assumed to grow at 2.6% per annum, based on a continuation of Dodona's annual growth rate between 2004 and 2007.

A3.16 Tonbridge's catchment potential between 2004 and 2016 is summarised in Table 6. The potential cinema catchment population has been converted into a total number of cinema admissions per annum based on national visitation rates (Dodona research) per person. Visitation rates have been projected based on Dodona projections. The total number of cinema admissions has been converted into an optimum number of cinema screens and seats, based on Dodona figures (75,000 visits per annum per screen) or 300 visits per annum per seat.

A3.17 Based on national visitation rates and current market shares Tonbridge's catchment population is capable of supporting only 2 screens or 492 cinema seats in 2006. There is currently no multiplex cinema provision in Tonbridge town centre, therefore, future growth in cinema admissions and the potential for Tonbridge to claw back cinema trips leaking from the study area should generate additional potential in the future.

A3.18 Based on future projections and an increase in Tonbridge's share of cinema admission, Tonbridge's town centre catchment potential could support the following provision:

	2006	**2011**	**2016**
Cinema screens	2.0	2.2	2.6
Cinema seats	492	554	641

A3.19 If we assume 100% retention rate of cinema trips within the catchment area then these projections suggest that there is in theory a limited potential for cinema development in Tonbridge. By 2011 there is the potential catchment for a 2 screen cinema or 550 cinema seats, likely to suit an independent cinema operator. However, due to the competing provision in neighbouring towns, including the close proximity of the Odeon cinema to the north of Tunbridge Wells, it is unlikely that Tonbridge will retain 100% of cinema trips generated by its catchment population. A reduction in the retention rate would reduce the screen and seat potential. If 50% of cinema trips, which seems more realistic, can be retained in Tonbridge then a small independent cinema with around 250-300 seats could be supported. Smaller operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas of this kind in recent years.

A3.20 The canvas of leisure operators undertaken during this study does not identify a demand for cinema development, however VUE cinemas have approached the Council in relation to the potential for a new cinema in the Borough. VUE were included in our survey of national retail and leisure operators, however they did not respond. When we spoke to them regarding their interest they confirmed that Tonbridge is listed as a possible location for one of their smaller cinemas with an approximate footprint of 20-25,000 sq ft, however they do not have a specific site in mind. A footprint of 20,000 sq ft has the potential of accommodating approx seven screens, however, this is dependent on layout and seating numbers may vary. VUE would be interested in developing a cinema in Tonbridge town centre as part of a mixed use retail and leisure scheme.

Private Health and Fitness Clubs

A3.21 The UK health club market has expanded rapidly as public awareness about personal fitness has increased. There are an estimated 5.8 million (9.9% of the population or 5.7% for the private sector) public and private health and fitness members (source: Business in Sport and Leisure 2003-2004 Handbook). This compares with 13.5% of the US population.

A3.22 There are 2,300 public and 1,900 private health clubs in the UK ranging from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Holmes Place, Livingwell and LA Fitness. The large branded operators have over 600 clubs, accounting for 47% of the total UK membership. In 1999, 155 new health clubs opened and 172 opened in 2001. Over 900 new clubs were under construction or with planning permission in 2003.

A3.23 Private health clubs had 3.4 members in 2002 (1,750 members per club). Large health clubs can have memberships of approximately 4,000 people. However, the UK market is still dominated by independent clubs.

A3.24 The major expansion of health clubs in recent years has led to an over-supply of clubs in some areas, particularly near major workplaces. The competition for sites has increased. Demand for membership also slowed in line with the general economy, due in part to redundancies in the City. However, Mintel expects the turnover of private health clubs to more than double between 1999 to 2007, to over £2.8 billion in 2007.

A3.25 There are a number of private health and fitness clubs in and around Tonbridge, as follows:

- Peak Fitness Ltd, Tonbridge;
- Fitlife, Tonbridge
- Hilden Health Club, Hildenborough;
- Sunny Gym, Tonbridge;
- Mountains health and leisure, Hildenborough;
- Hunters Health and Fitness, Tonbridge;
- Bodymission, Tonbridge.

A3.26 There are no large national operators in Tonbridge. Most facilities are small independent clubs. In addition to these private leisure/entertainment facilities there are several local authority owned sports centres. The Angel Leisure Centre has a sports hall and fitness suite, the Larkfield Leisure centre has a health and fitness suite and a 25 metre pool, and the Tonbridge Swimming Pool has a 25 metre pool, as well as a fitness suite, outdoor pool and two children's pools. All the Council's fitness suites are run by Lifestyles Health and Fitness.

A3.27 The leisure study area population is approximately 60,642 in 2004, which could generate demand for about 6,000 public and private membership places, based on the national average membership rate (9.9%). Population growth up to 2011 is relatively limited, and would only generate demand for a further 150 places, or 240 places by 2016. However, a future increase in membership rates could also generate additional demand. An increase in membership rates from 9.9% to 13.5% (the US rate) along with population growth could increase demand to 8,400 places by 2011, in the leisure study area as a whole.

A3.28 Some local residents may continue travel to health and fitness clubs in other towns, for example LA Fitness or Esporta in Tunbridge Wells, and David Lloyd in Maidstone, particularly commuters. However as indicated in the previous section, Esporta and David Lloyd both have requirements for large new health clubs in Tonbridge out-of-centre. Esporta have confirmed that they are looking for a minimum footprint of 60,000 sq ft, with space to provide approx. 250 parking spaces in a location that would attract residents from both Tonbridge and Tunbridge Wells. The demand for an additional health and fitness club in Tonbridge appears to be strong.

Tenpin Bowling

A3.29 Tenpin bowling grew quickly in the UK in the 1960's. However, the complex scoring system, lack of investment and the deterioration exacerbated a significant decline in the 1970's. However, a resurgence of interest in tenpin bowling during the late 1980's and computer scoring led to a second boom. There are now 260 tenpin bowling centres (5,600 lanes) in the UK, approximately one lane per 10,000 people. The tenpin bowling sector has experienced steady growth in recent years, 13% real growth between 1997 and 2002. Mintel predicts the value of the tenpin bowling market will increase from £245 million in 2002 to £324 million by 2007.

A3.30 Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.

A3.31 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.

A3.32 Tonbridge does not have a tenpin bowling facility. However, residents in the Borough have relatively good access to AMF Bowling in Maidstone and Chatham.

A3.33 Given the existing provision and the catchment population there appears to be limited potential for a further ten pin bowling facility.

Bingo

A3.34 Great Britain had 688 commercial bingo clubs in 2002, approximately one club per 80,000 people. Bingo clubs have about three million active members and generate 89 million admissions per year (source: BISL).

A3.35 The bingo market peaked in the mid-1970's, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. However, the decline has bottomed out and attendance figures have remained steady since the late 1990's, and revenues and profits have started to increase.

A3.36 Mecca and Gala 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.

A3.37 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns.

A3.38 There are currently no commercial bingo halls in Tonbridge. The provision of bingo halls in surrounding towns may explain the absence of this type of facility in the Borough, i.e. Gala has facilities in Maidstone and Rochester. Mecca Bingo Rank Group) consider Tonbridge to have a too small a catchment for a bingo hall and also consider the demographics of the area are not suitable to support a bingo hall.

Nightclubs

A3.39 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

A3.40 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

A3.41 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Tonbridge town centre only has one nightclub; Ice Night Club. This existing provision is limited, however the larger nightclubs in Tunbridge Wells and Maidstone may limit the potential for major new nightclubs in the town centre, but smaller facilities may be viable.

Bars and Restaurants

A3.42 On average, households in the South East spent over £1,000 per annum eating and drinking away from the home in 2001-02 (source: Family Expenditure Survey). Between 1998 and 2002 the eating out market grew by 22%. Pub and restaurant meals account for over 41% of the eating out market.

A3.43 Food and drink establishments (Class A3) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa coffee and Coffee Republic.

A3.44 National branded pub/restaurant chains have been investing heavily, although not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities. These include centres of a similar size to Tonbridge and sometimes smaller.

A3.45 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 12.3. The proportion of Class A1 retail uses in Goad town centres has decreased by 9% between 1991 to 2002 (6 percentage points), whilst non-retail uses including Class A2, A3 and non-retail (service) A1 uses have all increased.

A3.46 In general, larger regional and sub-regional centres will have a higher proportion of retail units than smaller town and district centres, which have a mix of shops and services. Because the national average is skewed by large centres with a high proportion of Class A1 use and lower proportion of non-retail use, one may expect smaller town centres to have a higher proportion of Class A3 uses than the national average. The proportion of Class A3 uses in Tonbridge (11.7%) was slightly lower than the national average (12.6%) in April 2003, this reflects its medium size and proximity to larger town centres such as Tunbridge Wells.

Table 12.2: GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1991 to 2002	Proportion of Total Number of Units (%)			
		1991	1994	2000	2002
Class A1 (Retail)	- 9	62.7	61.2	59.1	56.1
Class A1 (Services)	+33	6.6	6.9	8.2	9.0
Class A2	+23	8.2	8.5	8.9	10.3
Class A3*	+43	8.6	9.2	11.2	12.5
Miscellaneous	+87	0.8	1.0	1.4	1.5
Vacant & Under Const.	- 19	13.1	13.2	11.2	10.6
Total	-	100.0	100.0	100.0	100.0

Source: Goad Centre Reports *excludes Public houses

A3.47 Themed bar operators and pub restaurants have grown significantly over the last ten years, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Tonbridge town centre may offer potential for these types of uses. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links. The published Focus Retail Requirements suggests there is demand from Best Cellars and SFI Group.

A3.48 Themed restaurants have also expanded rapidly in recent years. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares. Our canvas of leisure and retail operators and published requirements suggest that Famous Moe's

Pizza Ltd, Frankie and Benny's, Subway and Pizza Hut may be looking for opportunities within Tonbridge.

A3.49 The growth in Class A3 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. Future town centre development should provide additional space for these uses as well as Class A1 retail. An allowance of 10% to 15% of new floorspace for Class A3 uses may be appropriate.

Casinos

A3.50 Due to the changing nature of the casino market, with its proposed deregulation, there is uncertainty to where casinos, specifically regional ones will be located. Prior to deregulation operators could only obtain licences for casinos in specifically defined areas. Therefore new locations were based on the amount of competition and available licences.

A3.51 Operators now have to think in more details about the catchment area of their casinos and the level of existing or future competition in a given area. From our knowledge of the casino market, key catchment areas will have to be within or within the near vicinity of a large centre such as a major town or city, with a drive time of approximately 30-40 minutes and as close to the centre of the catchment area as possible, with good transport links. The proximity of other established commercial uses will also a key factor for operators when looking at locations for casinos.

A3.52 There are currently no commercial casino's in Tonbridge, or in the surrounding area. No specific catchment area population has been identified by casino operators, however, it may be that Tonbridge town centre is large enough to support a casino, with larger centres in Kent such as Tunbridge Wells, Ashford and Maidstone being more attractive locations. However, as the market adjusts to deregulation, the locational requirements of casinos may evolve and become more clearly defined. Our canvas of retail and leisure operators included several major casino operators, however a requirement for a casino in the Tonbridge area was not identified.

Hotels

A3. 53Over the past few years, Britain's Hotel Industry as a whole has seen occupancy fall, which has led the average room rate to fall and in turn pushed down room yields. Economic uncertainty in the run up to and during the Iraq war in 2003 has hindered the recovery of the hotel market. It was hoped that the market would improve in 2004, however, the continued threat of terrorism is likely to have had an impact on the hotel industry. The poor performance has not been reflected across Britain, with London seeing the biggest drop in rooms yield, but Britain's south coast towns fairing well particularly Southampton and Bournemouth as well as York, Cardiff, Manchester and Sheffield. These towns and cities have seen a 3% rise in rooms yield during 2004.

A3.54 There is optimism within the hotel industry that the market will recover, however there is still concern that international events could again hinder the recovery process. For 2004, average daily room rates per occupied room were £64.45 for UK regional hotels, with an average daily rooms yield per available room of £48.72 (Source PKF Accountants and Business Advisors).

A3.55 There are several independent hotels located within Tonbridge town centre, however there is only one national chain, Best Western. Best Western also have hotels in Sevenoaks and Maidstone. In Maidstone there is also Hilton, Ramada and Jarvis hotels. In Sevenoaks there is a Holiday Inn and in Tunbridge Wells there is a Ramada Hotel.

A3.56 With the current market situation being so uncertain, it may mean that hotel operators take a cautious approach and limit the development of new hotels. Our canvas of retail and leisure operators did not identify any requirements by national hotel operators in the Tonbridge area.

Other Leisure and Entertainment Facilities

A3.57 Tonbridge has a limited provision of other leisure and entertainment facilities, the main example of which are as follows:

Theatres
- Tonbridge Oast Theatre;

Other
- Tonbridge Bowling Club;
- Poult Wood Golf Centre;
- Swanmead Golf Driving Range;
- Tonbridge Snooker Club; and
- Angel Indoor Bowls Centre.

TONBRIDGE OPERATOR REQUIREMENTS SURVEY

- 305 questionnaires were sent to a range of national/regional retail and leisure companies.
- In total 59 responses were received (19.3% response rate). Some of the companies requested that their responses remain confidential, however, the following companies did allow their responses to be made public.
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Game	Scator Menswear	Marie Curie Cancer Care
Aldi	Bang & Olufsen	Jessops
Brantano Footwear	Gift Company	UGC Cinemas
Hair Express	Poundstretcher	Littlewoods
New Look	House of Fraser	Sharp Bedrooms
Subway	F Hinds	Swatch
Right Price	Bookworld	Sports Café
Sussex Bed Centre	Between the Lines	Showcase Cinemas
Esporta Group	Oasis	Waitrose
Farm Foods (possible)	Coast	O'Briens Irish Sandwich Bar
Topsy Turvy	The Pier	Mosen Kitchens
David Lloyd Leisure Centre	Domino's Pizza	Courts Plc
Staples	Jigsaw/Kew	Maplin Electronics
Toys'r'us	Courts Plc	QS Group
Greggs		

*Bold indicates those retailers who have a requirement in the Tonbridge area

Questionnaire Results

Q.1 Does your company have a requirement for new or expanded premises in Tonbridge?

Yes	16 (27%)
No	42 (73%)
Possible	1
Total 59	

Q.2 If 'No' to Q.1, what are the main reasons why you are **not** looking for premises? Could this change in the future?

Reasons cited:

'Insufficient demand from the catchment area/catchment area to small'	10
'Already adequately represented in area'	19
'Not current target area'	9
'Proximity to other large centres'	4
'Too much competition in the area'	0
No reason given	15

Q.3 If yes to Q.1, for which centre (s) areas do you have a space requirement?

Tonbridge town centre	8 companies
Tonbridge out-of-centre	11 companies

Companies requiring space (and allowed their details to be published) in **Tonbridge Town Centre and out-of-centre locations:**

Food stores:	**Aldi Stores Ltd** (new unit of 14,000 sq ft in Tonbridge Town Centre, also interested in out-of-centre locations)
	Farmfoods Ltd (possible requirement for new unit in town centre of 5,000-7,000 sq ft with surface car parking and artic delivery)
Clothing and Footwear:	**Brantano UK Ltd** (new or expanded unit of 5,000 sq ft in out-of centre location)
	New Look Ltd (expanded town centre unit of 6,000 sq ft and ancillary floorspace)
Leisure:	**David Lloyd Leisure Plc** (new out-of-centre unit of 100,000 sq ft)
	Esporta Group (new out-of-centre unit. Size not defined)
Other:	**Game** (new unit of 1,500 sq ft of retail floorspace in Tonbridge Town Centre).
	Subway (new unit in Tonbridge town centre of 1,000 sq ft)
	Right Price (new unit in Tonbridge town centre of 2,000 sq ft)
	Sussex Bed Centre (new out-of-centre unit of 8,000 sq ft)
	Hair Express (new or expanded Tonbridge town centre unit of 800 sq ft)
	Topsy Turvey (new or expanded out-of-centre unit of 12,000 sq ft)
	Staples (new out-of-centre unit of 12,000 sq ft)

Q.5 What has prevented you from securing this requirement to date?

Reasons cited:

'Lack of availability/suitable sites/premises': Game/Aldi Stores Ltd/Brantano Footwear/New Look/Subway/Right Price/Sussex Bed Centre/Hair Express/Topsy Turvey/David Lloyd/Esporta Group/Staples

'Too restrictive planning policy': Brantano Footwear/Staples/David Lloyd

'Rents too High': Staples

Other responses: Game – 'Low priority on list'

RETAIL FOCUS – RETAILER AND LEISURE REQUIREMENTS (JULY/AUGUST 2004)

TONBRIDGE

COMPANY NAME	SECTOR	REQUIREMENT
99P Stores	Variety/Discount Stores	4,000-6,000 sq ft
Aldi Stores	**Supermarkets**	**-**
Argos	Variety/Discount Stores	10,000-16,000 sq ft
Barnados	Booksellers/Charity Shops	500-1,500 sq ft
Best Cellars	Public Houses	3,000 sq ft
Between the lines	Gift Shops/Fancy Goods	900-1,300 sq ft
Bon Marche	Womens Wear	2,500-4,000 sq ft
Cardfair	Newsagent/Cards/Stationer	1,000-2,500 sq ft
Esporta Health and Fitness Clubs	**Leisure/Sports**	**60,000 sq ft**
Famous Moe's Pizza Ltd	Fast Food/Takeaway Outlets	850-1,000 sq ft
Farmfoods Ltd	**Food**	**5,000-7,000 sq ft**
Frankie and Benny's	Café/Restaurant/Bar	3,500-4,400 sq ft
Holland and Barrett Ltd	Health Foods	1,000-1,500 sq ft
Julian Graves Ltd	Health Foods	400-1,000 sq ft
La Weight Loss Centre Ltd	Service/Specialist	900-1,200 sq ft
Laithwates	Off Licences/Liquor retail	2,500-5,000 sq ft
Marie Curie Cancer Care	Charity Shops	500-1,000 sq ft
Matalan Retail Ltd	Clothing/Household Accessories	30,000-40,000 sq ft
Pets at Home	Pet Shops	4,000-10,000 sq ft
Phones 4 U Ltd	Mobile Phones	800-1,500 sq ft
Pizza Hut (UK) Ltd	Café/Restaurant/Bar	-
Priceless Shoes Ltd	Shoe Shops	1,500-2,000 sq ft
Saks Hair (Holdings) Ltd	Hairdressers/Beauticians	1,000 sq ft
Scope	Charity Shop	750-5,000 sq ft
SFI Group Plc	Café/Restaurant/Bar/Public Houses	3,000-9,000 sq ft
Staples	Furniture/Office Equip/supplies	10,000-17,500 sq ft
Superdrug	Chemists	1,500-6,000 sq ft
Sussex Bed Centres	**Household Accessories/Linens**	**5,000-10,000 sq ft**

Name/Agent:	
Company Name:	
Trading Name: (If different from above)	
Contact Telephone No.	

Q.1 Does your company have a requirement for new or expanded premises in Tonbridge?

Yes ☐
No ☐
If 'YES' go to Question 3

Q.2 What are the main reasons why you are not looking for premises in Tonbridge? Could this change in the future?

Insufficient demand from the catchment area/catchment area too small ☐
Already adequately represented in the area ☐
Not current target area ☐
Proximity to other larger centres ☐
Too much competition in the area ☐
Other (please specify below) ☐

………………………………………………………………………………………………………

………………………………………………………………………………………………………
Go to Question 6

Q.3 For which centre (s) areas do you have a space requirement?

Tick All Relevant Boxes

	New Unit	Expanded Units
• Tonbridge town centre		
• Tonbridge out-of-centre		

Q.4 About how much space/provision do you require?

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Q.5 What has prevented you from securing this requirement to date?

Lack of available/suitable sites/premises ☐
Too restrictive planning policy ☐
Rents too high ☐
Other (please specify below) ☐

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Q.6 Please make any additional comments in the space provided below……………………………….……….

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Please tick the box if you would like this information to remain confidential. ☐