Tonbridge and Malling
Retail & Town Centres Needs Study

Final Report

Tonbridge and Malling Borough Council

26 September 2025

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Contents

1.0 Introduction

1.1 Tonbridge and Malling Borough Council ('the Council') commissioned Lichfields to prepare an evidence study for the emerging Local Plan for Tonbridge and Malling. This evidence includes two broad inter-related areas of analysis. This report sets out retail and town centre uses needs evidence. This report should be read alongside the Economy Study given the inter-relationship between many employment, retail and town centre planning issues.

1.2 The two studies assess the qualitative needs for land and floorspace for economic activity over the plan period to 2042. They will also advise on the retail sector and the needs for retail floorspace at five-year intervals to 2042.

1.3 This report has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 90) and the evidence to assess the need for economic development (paragraph 86). The assessment also takes account of the Planning Practice Guidance (PPG). Tonbridge and Malling Borough Council is currently preparing a Local Plan, and this retail evidence will inform its preparation.

1.4 The retail and town centre related objectives of the study are to assess the following matters:

- high level town centre health checks for Tonbridge and the five district centres, as well as a Local Needs Index of local centres and neighbourhood parades;
- identify and assess the trend in town centre uses;
- identify the retail and town centre requirements over the plan period to 2042; and
- establish the scope of opportunity for further planned provision.

Structure of the Report

1.5 The remainder of this report is structured as follows:

- Section 2 provides an updated overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for Tonbridge and Malling should reflect these underlying trends.
- Section 3 examines the existing hierarchy of centres within Tonbridge and Malling, and sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. Appendix 2 provides more detailed centre health checks, and the capacity tables are shown in Appendix 3 and 4.
- Section 4 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses. The capacity tables are shown in Appendix 5.
- Section 5 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).

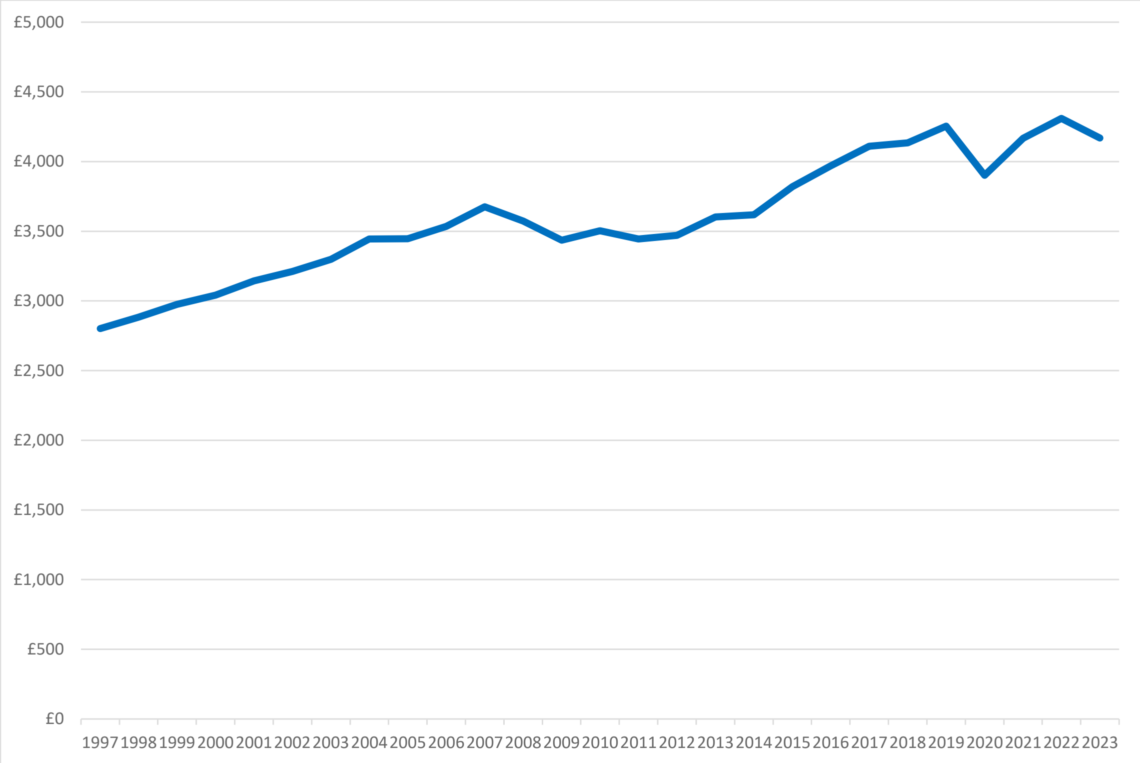
1.6 Section 6 summarises the main conclusions of the Study.

2.0 Town Centre and Retail Trends

National trends

2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2023 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the recession and credit crunch in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Comparison goods expenditure per capita dropped sharply in 2020 due to the impact of Covid-19 lockdowns, but expenditure recovered to pre-Covid levels in 2022. However, expenditure per person declined in 2023 due to the on-going cost-of-living and energy crisis.

Figure 2.1 UK growth in comparison goods expenditure per head (2022 prices)



Source: Experian Retail Planner Briefing Note 22 (March 2023) – Appendix 4b.

2.2 The main implications of Brexit, Covid-19, high inflation, the cost-of-living and energy crisis for evidence base studies were as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that distorted levels of expenditure during 2020, 2021 and 2022; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.3 The key on-going uncertainties relating to the first two points are primarily the length of the cost-of-living crisis. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

2.4 Operators have continued to face elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 crisis. Short-term supply chain disruption led to inflationary pressure, which had an impact of consumer demand.

2.5 Retailers with infrastructure to fulfil on-line orders/home delivery benefitted during the Covid-19 crisis. There has been a structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

2.6 As a result of these trends, there has been a spike in town centre vacancies with many businesses failing, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis exacerbated difficult trading conditions. Many national operators have announced job losses and store closures.

2.7 Reflecting these trends, Experian's latest forecasts (published in March 2025) suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping.

Experian’s latest retail expenditure forecasts

2.8 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 22 – March 2025). The study sets out expenditure projections during five-year intervals up to 2042.

2.9 The current cost-of-living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2023, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2024 and 2025. Low growth is predicted during 2026, but higher annual growth is expected in the longer-term.

2.10 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

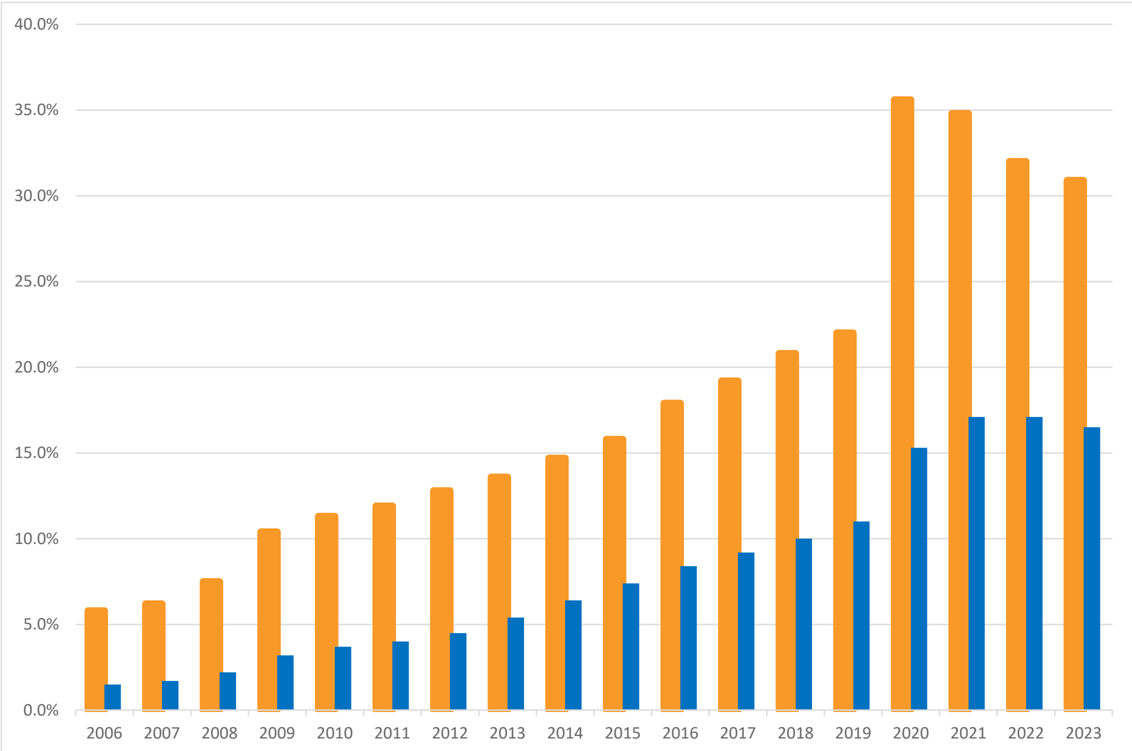
2.11 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020. Convenience goods expenditure per capita is expected to continue to fall during 2025 and 2026. In the longer-term a small decline is forecast at -0.3% per annum between 2027 to 2031 and -0.2% per annum thereafter. Despite this forecast reduction in total expenditure per capita, Experian expects continued growth in non-store sales. Any need for new convenience goods retail floorspace in the borough is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

2.12 Comparison goods expenditure per head is predicted to fall by -1% during 2024 but will increase marginally by 1.4% during 2025 and 2026. Modest growth is expected in the longer-term (between 2.5% to 3.6% per annum), but still at a lower rate than previous historic 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.

2.13 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.

2.14 Experian's Retail Planner Briefing Note 22 (March 2025) suggests non-store retailing's market share increased from 17.8% in 2019 to 27.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines and home deliveries. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 2.2

Figure 2.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 22 (March 2025) – Appendix 3

2.15 Comparison non-store sales increased from 22% to 34.8% and convenience good sales increased from 11% to 17.1% between 2019 and 2021. However, Experian indicates comparison goods non-store sales figure fell during the post Covid lockdown period in 2022 and 2023, reducing from 34.8% to 30.9%. Convenience goods non-store sales also fell to 16.5%. Nevertheless, the 2023 figures remain significantly higher than the pre-Covid market shares in 2019.

2.16 This data suggests the proportion of retail sales spent on-line will continue to grow, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.

2.17 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with previous trends. It is too early to plan for a further shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

2.18 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

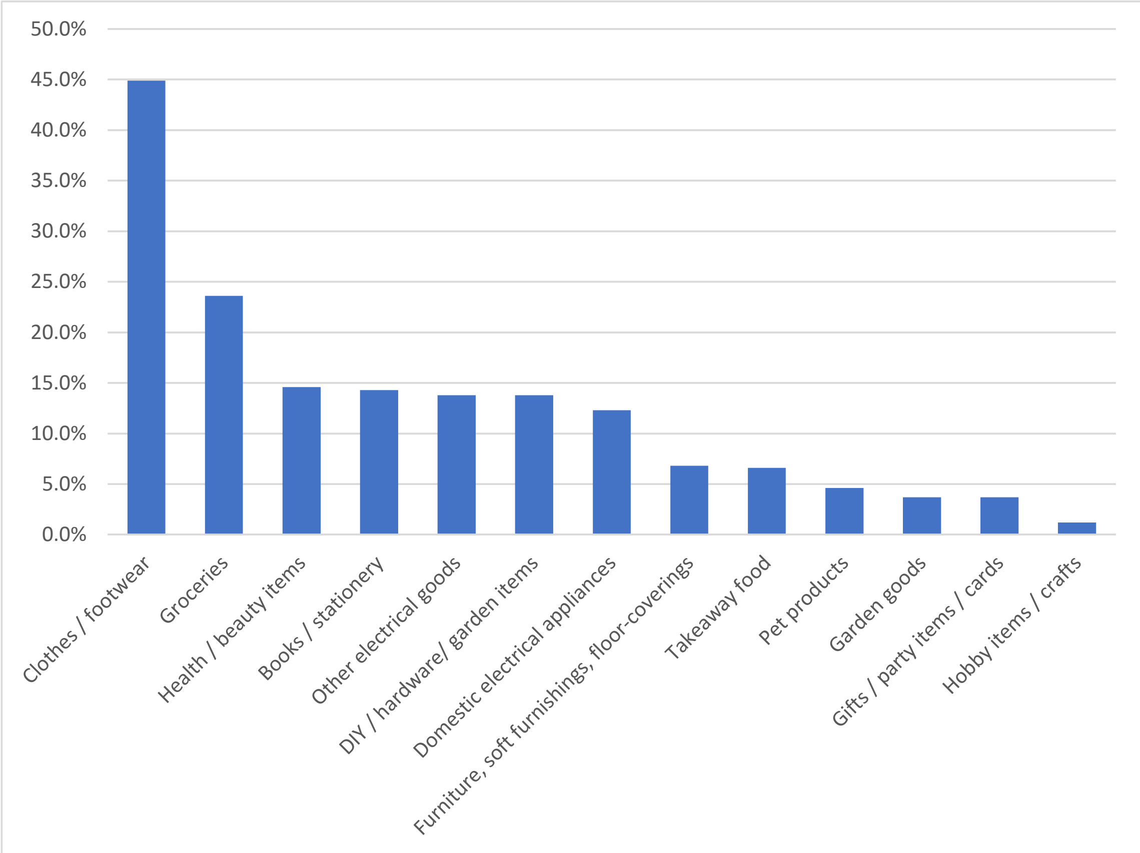
Shopping behaviour in Tonbridge and Malling

2.19 The household survey results for 504 completed interviews during June 2023 across the Tonbridge and Malling study area (as shown in Appendix 1), indicate many households regularly buy items from the internet for home delivery.

2.20 The survey results suggest 42.2% of respondents do most of their household's non-food shopping on-line and 19.2% of households did their last main food and grocery shop via the internet/delivery.

2.21 The products regularly purchased by households online are shown in Figure 2.3. These survey results indicate that a broad range of non-food goods are purchased on-line, but clothing /footwear and groceries are most often purchased online.

Figure 2.3 Items regularly purchased via the internet (% of all households)



Source: NEMS household shopper survey June 2023 (weighted results)

Mode of travel and frequency of trips

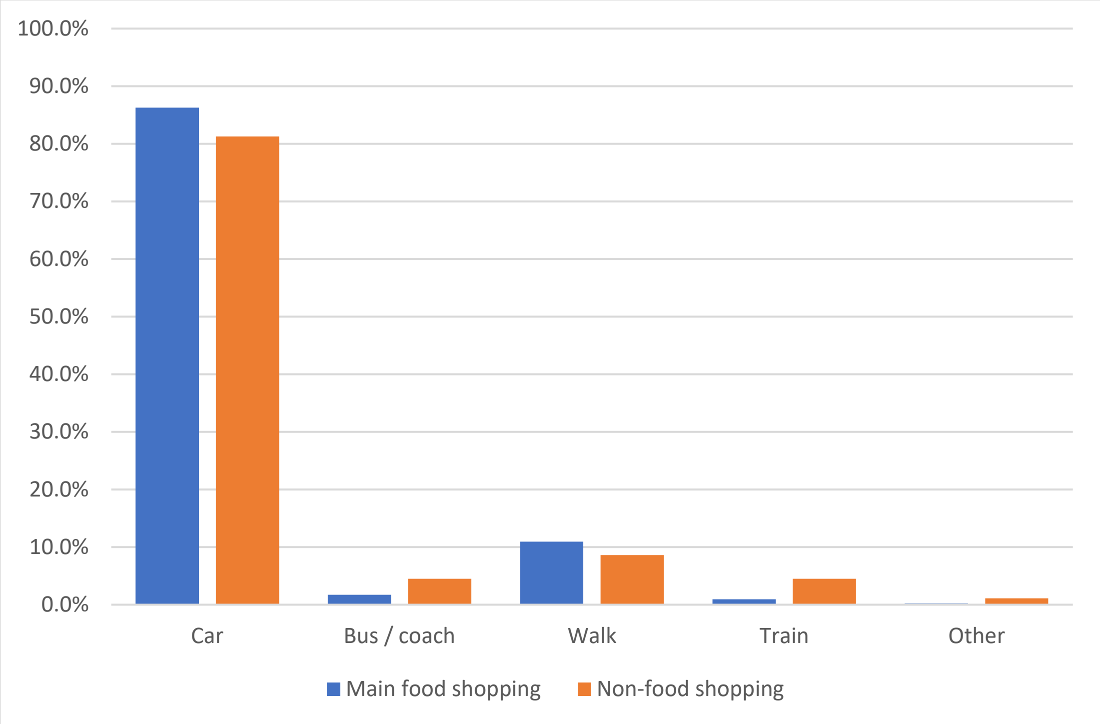
2.22 As indicated above, 42.2% of respondents do most of their non-food shopping on-line and 19.2% did their last main food and grocery shop via the internet/delivery. Experian suggests over 30% of retail sales was via non-store activity in 2021. These figures suggest many households do not need to travel to undertake food and non-food shopping.

2.23 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.4.

2.24 Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.

2.25 Car usage is generally higher for main food shopping than for non-food shopping because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus travel and walking is slightly higher for non-food shopping.

Figure 2.4 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household shopper survey June 2023 (weighted results).

2.26 Car travel for food (86.3%) and non-food (81.3%) shopping was high across all zones, but is lower than average in the main urban Zone 1 – Tonbridge Urban (63.4% and 65.5%). Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally over 80% of households for main weekly shopping. Lower levels of car usage in urban areas is normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Demand for town centre floorspace

2.27 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector had an impact on the high street in the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but has increased to 14.8% in March 2025. There was a sharp increase in shop vacancies in many town centres due to the impacts of Covid-19 and the growth in on-line shopping.

2.28 Lichfields' surveys during May 2025 indicate the number of vacant units was 41 across Tonbridge and the five district centres. These vacancies were spread across a variety of units, ranging from 7.1 sq.m to 3,619 sq.m (with an average of 232 sq.m). The average shop unit vacancy rate in the main centres is 9.6%. This figure excludes office and residential uses in town centres. The borough's shop vacancy rate is lower than the UK pre-Covid-19 average (12.4%) and the current post-Covid national average (14.8%). Borough Green district centre has the highest vacancy rate (13.9%) but is still below the UK average.

2.29 The 2005 Tonbridge and Malling Retail Study indicated there were 18 vacant shop units in Tonbridge Town Centre in 2003 compared with 22 recorded in 2025. Whilst there have been significant changes in town centres and challenging market conditions (largely as a result of macro-economic trends) over this time period, this marginal increase in vacant shop units in Tonbridge town centre is inconsistent with national trends shown above. This suggests Tonbridge town centre has performed reasonably well despite the difficult market conditions over the last two decades.

2.30 The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. A more detailed analysis of the mix of uses in the borough's main centres compared with the national picture is set out in Appendix 2.

2.31 Property owners, landlords and fund managers have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Retailers have been continuing to 'right size' their portfolios, with many operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure property assets. These trends have been exacerbated by the cost-of-living crisis and are expected to continue at least in the short-term.

2.32 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for non-retail uses i.e. food/beverage and leisure uses e.g. trampolines, escape rooms, climbing and indoor golf.

Food store operators

2.33 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).

2.34 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores have increased significantly during the last decade. Mintel reports that the number of Tesco Express stores increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020. During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased. This trend is less evident in the borough with Sainsbury's Local stores in Tonbridge and Borough Green, a Tesco Express store in Larkfield and a Little Waitrose in Kings Hill.

2.35 Several proposed larger superstores were not implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips rather than bulk food shopping. This trend increased with more homeworking during the pandemic lockdowns, which have not moved back to pre-Covid levels.

2.36 The expansion of European and other discount food operators including Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. This trend is evident in Tonbridge and Malling with three Aldi stores, two Lidl stores and a Home Bargains store. Lidl at Ditton and Aldi at Kings Hill have opened since 2021.

2.37 The number of small independent food and grocery shops in town centres declined over many years, as the number of larger chain or 'national multiple' food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers. There is reasonable representation of these specialists in the borough, particularly in Tonbridge.

Comparison retailers

2.38 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

2.39 The demand for premises from the bulky goods sector, i.e. furniture, carpets, electrical and DIY, has been particularly weak in recent years. The difficulties recently experienced by Homebase is an example of this trend. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This downward trend in bulky goods stores has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied more units on retail parks in recent years e.g. Home Bargains, Poundland and B&M Bargains.

2.40 The out of centre retail warehouse sector is reasonably well represented in the borough with a concentration of large stores at Tonbridge (i.e. Tonbridge Retail Park and Cannon Lane Retail Park) and Aylesford (i.e. South Aylesford Retail Park).

2.41 Within 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 into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Kent, where the focus of comparison goods national multiples is in Bluewater, Tunbridge Wells, Maidstone and to a lesser extent Tonbridge, with a limited provision in other smaller centres.

2.42 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in these larger sub-regional and regional centres. Centres in the borough, apart from Tonbridge, are at a lower level in the established retail hierarchy and multiple operator demand may be much less in these centres in the future. 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. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.

2.43 The continuation of these trends will influence future operator space requirements in the borough with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

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Charity and discount shops

2.45 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

2.46 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Tonbridge and Malling with a strong presence of charity shops in most centres. There are 16 charity/second-hand shops within the six main centres in the borough, 18.2% of all comparison shops, which is substantially higher than the UK average of 9.7%.

2.47 There are mixed views on whether or not the proportion of charity shops correlates with the broader health of a centre. A high concentration of charity shops can be seen to detract from the appearance of high streets, since some shoppers could perceive charity shops as representative of a lower quality (more discount oriented) town centre offer, occupying units at the expense of other town centre investment. However, it does not follow that these charity shops will be replaced by traditional shops when the market recovers.

2.48 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts and occupiers are becoming increasingly professional in their appearance and approach to sales. These lower overheads allow such stores to occupy vacant units that may otherwise have remained unviable, whilst providing discounted goods and helping to maintain town centre footfall.

Non-retail services

2.49 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

2.50 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.6% in 2025. Many smaller town centres now have no remaining banks/building societies. Across the UK banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is evident in the borough, where Tonbridge has two bank/building society branches and out of the other centres, only West Malling has a building society branch.

2.51 Banking hubs have emerged and enable major banks to maintain a high street presence whilst reducing costs, with different banks sharing the same unit and operating on different days. This trend has not emerged in the borough, but this could change in the future. Continued rationalisation of bank and financial services could lead to an increase in town centre vacancies.

2.52 There are 7 betting shops in the six main centres in the borough in 2025, which is just under 4% of all units, which is above the national average of 1.0%. The main concentration of betting shops was in Snodland town centre (9.5%).

2.53 There were 30 hot food takeaways in the borough's main centres, 7.6% of all units, which is above the UK national average of 6.4%. Martin Square/Larkfield (19.4%) and Snodland (14.0%) have the highest proportions of hot food takeaways.

2.54 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 (PDR) to control the growth of these uses in town centres. Some provision of such uses helps to attract visitors and supports the vitality and viability of town centres, whilst an overconcentration can detract from the overall offer of a centre. These trends have not been particularly evident in the borough, and we do not consider any of the above uses to be detrimental to the health of Tonbridge and Malling's centres.

2.55 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been supressed by the Covid pandemic. The impact of these changes will need to be carefully monitored. The cost of living crisis may increase demand for change from retail to other uses.

The evening economy

2.56 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.57 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This hospitality sector in town centres was the most adversely affected by the Covid-19 crisis.

2.58 Restaurants, cafés, sandwich bars and coffee shops are now in the new Use Class E, whilst pubs/bars and hot-food takeaways. In terms of how customers use food and beverage outlets the key categories 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.

2.59 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the borough, and this sector appears to have to some extent recovered following the Covid crisis.

2.60 There were 88 food/beverage outlets in the six assessed main centres in the borough, 22.3% of all units, which is slightly below the UK average of 22.8%. However, Tonbridge, Kings Hill, and West Malling have a higher-than-average provision of restaurants/cafés, above the UK average of 11.2%. Martin Square and Larkfield and Snodland have a higher provision of hot food takeaways rather than restaurants/cafés.

2.61 There were 10 pubs/bars (2.5% of all units), which is significantly below the UK average (5.2%). The number of pubs/bars is relatively low in all the main centres. Overall, the evening economy of the borough's centres is focused on restaurants/cafés or hot food takeaways.

Pop-up spaces

2.62 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis, but this is not currently particularly evident in Tonbridge and Malling.

Other leisure uses

2.63 We go on to provide commentary on the market trends for other leisure, entertainment and cultural main town centre uses at Section 4, including cinemas, theatres and music venues, health and fitness clubs, tenpin bowling and other indoor leisure activities, bingo halls and other games of chance.

National Policy and other changes

2.64 The most recent revision to the NPPF was published in December 2024, which sets out that planning policies should (para. 90):

- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.65 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the revised NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.66 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping, elevated by Covid-19 and the cost-of-living crisis. Experian data suggests relatively modest levels of growth in on-line shopping going forward, accounting for the significant changes over the past few years.

2.67 The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses can extend activity throughout the daytime and into the evenings.

2.68 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

2.69 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

2.70 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

2.71 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

2.72 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. Such uses will often trigger consideration of 'agent of change' principles, which dictates that where the operation of an existing business or community facility could have a significant adverse effect on new development in its vicinity, the applicant should be required to provide suitable mitigation. (NPPF, para. 193) The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

2.73 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.

2.74 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies.

2.75 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.

2.76 Class MA introduced certain commercial to residential permitted development rights. The new Class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.77 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.

2.78 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.79 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class M PD right falls away.

2.80 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights.

2.81 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.

2.82 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A key change arising from Class MA is the loss of a prior approval matter considering the impact of the loss of retail.

2.83 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.84 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

Summary

2.85 The trends and changes highlighted in this section, including the growth of online shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants.

2.86 The shop vacancy rate across all of Tonbridge and Malling's centre remains relatively low (10.4%), below the UK average (14.8%) which is indicative of centres that are generally successful in attracting new occupiers to vacant units when they do become available. This is also known as 'churn', and the emergence of new operators is an essential aspect of the vitality and viability of a centre. As set out above, whilst Tonbridge and Malling has seen an increase in the proportion of retail service uses across the centres, we have not identified an overconcentration of any specific uses that would cause undue concern.

2.87 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. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

2.88 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 has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost of living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

2.89 Shopping behaviour will continue to change, and town centres will need 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, leisure and cultural experience for those looking for a "day out" or "evening out".

3.0 Requirements for Retail Space

3.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis (summarised at Appendix 1) and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

The Hierarchy of Centres

3.2 The Tonbridge and Malling Borough adopted development plan sets out an established hierarchy of centres. Tonbridge is designated as a town centre at the top of the hierarchy. The next tier is five district centres at: Borough Green, Kings Hill, Martin Square/Larkfield, Snodland and West Malling. The mix of uses in the six main Town and District Centres is shown in Table 3.1.

Table 3.1 Number of outlets by use

Centre	Total retail units	Comparison goods retail	Convenience goods retail	Food / beverage	Other services*	Vacant units
Town Centre						
Tonbridge	172	44	27	34	35	21
District Centres						
Borough Green	36	7	5	8	9	5
Kings Hill	22	4	1	8	3	3
Martin Square/Larkfield	36	5	4	10	10	2
Snodland	43	8	4	8	14	2
West Malling	86	20	3	21	23	5

Source: Experian Goad and Lichfields' surveys May 2025 * excluding offices, leisure, community and residential uses

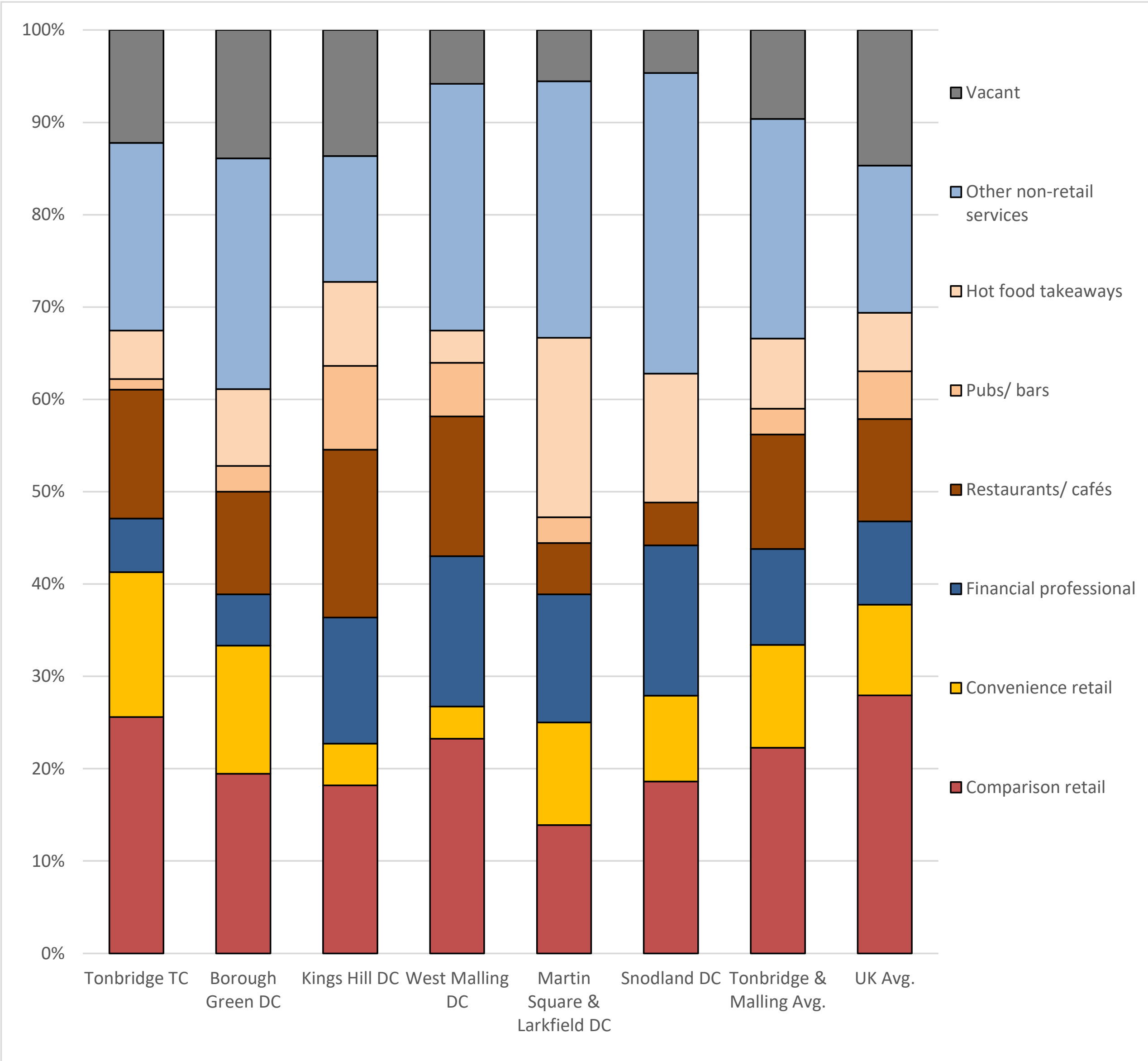
3.3 This information indicates that Tonbridge town centre has 172 retail/service premises and has a reasonable mix of facilities. District centres are smaller (around 22 to 86 units) with a more limited range and choice of comparison goods shopping. Whilst West Malling is almost twice the size of the next biggest centre, the scale of the centres are typical for 'second order' centres in our experience.

3.4 Figure 3.1 below shows the composition of the six main centres in terms of the mix and proportion of different uses, i.e. the proportion of shop units within each use class. This is compared with the borough and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 2.

3.5 All centres have a reasonable mix of retail and service uses. However, all the centres with the exception of Tonbridge have a lower proportion of comparison goods retail units in comparison with the national average, while Kings Hill and West Malling have a much lower proportion of convenience goods retail units than the national average. All centres aside from Kings Hill have a high proportion of non-retail services, particularly Snodland (32.6%). The food/beverage offer varies significantly, with good restaurants/cafés provision in Kings Hill (18.2%) and much weaker provision in Snodland (4.7%). Generally, the pubs/bars offer is distinctly low across the borough, with all centres except Kings Hill and West Malling having a proportion lower than the UK average (5.2%). Snodland does not have any pubs/bars and has a much larger proportion of hot food takeaways instead – similar to the ratios at Martin Square/Larkfield.

3.6 Shop unit vacancy rates in the borough for all the centres are lower than the current UK average (14.8%).

Figure 3.1 Mix of retail and service uses (excluding offices, leisure, community and residential uses)



Source: Experian Goad and Lichfields' surveys, May 2025

3.7 The analysis of the hierarchy of centres in this section indicates Tonbridge and Malling has a well-established network of centres that currently serve their respective areas. Tonbridge is the only centre with a truly borough-wide catchment area. The health of the main centres is assessed in more detail in Appendix 2. Continuing to identify the hierarchy of centres in future development plans is important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

3.8 The network of centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Local Centres and Neighbourhood Parades

3.9 In addition to the town and district centre designations described above, Tonbridge and Malling's current Development Plan defines a number of Local Centres, summarised across Table 3.2 below:

Table 3.2 Existing Local Centre Hierarchy

Centre	Policy Document	Designation
Martin Hardie Way, Tonbridge	Development Land Allocations DPD, Policy R1	Tonbridge Urban Local Retail Centre
York Parade, Tonbridge	Development Land Allocations DPD, Policy R1	Tonbridge Urban Local Retail Centre
Twisden Road, East Malling	Development Land Allocations DPD, Policy R1	Medway Gap Urban Local Retail Centre
Premier Parade Aylesford	Development Land Allocations DPD, Policy R1	Medway Gap Urban Local Retail Centre
Woodlands Parade, Ditton	Development Land Allocations DPD, Policy R1	Medway Gap Urban Local Retail Centre
Little Market Row, Leybourne	Development Land Allocations DPD, Policy R1	Medway Gap Urban Local Retail Centre
East Peckham	Core Strategy, Policy CP22	Rural Local Retail Centre
Hadlow	Core Strategy, Policy CP22	Rural Local Retail Centre
Hildenborough	Core Strategy, Policy CP22	Rural Local Retail Centre
Leybourne Chase	Core Strategy, Policy CP22	New Local Retail Centre
Peter's Village	Core Strategy, Policy CP22	New Local Retail Centre

3.10 PPG for Town Centres and Retail refers to a hierarchy of city and town centres, district and local centres (and their interrelation with high streets) at paragraph 001. However, there are no current national planning policy designations that define or differentiate the role of such town, district and local centres that would be applicable to Tonbridge and Malling.

3.11 In the absence of clear definitions of different tiers of the retail hierarchy within either the PPG or the NPPF, it is noted that the former Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4), published in 2009 and since withdrawn, did set out suitable definitions that remain of some relevance:

"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for

extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."

3.12 In respect of 'small parades of shops' as referenced in PPS4, the NPPF glossary (Annex 2) definition of 'town centre' also highlights *that "references to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance."* As such, small neighbourhood parades are specifically identified as differing from local centres, and to be excluded from classification within the retail hierarchy.

3.13 The Government's 2012 publication *'Parades to be Proud of'* was prepared at the same time as the original NPPF and defines local neighbourhood parades as *"typically located in the heart of a residential community, urban and rural, often with around 5-10 units, providing walk in convenience shopping and limited local services."*

3.14 Informed by these broad definitions, Table 3.3 sets out an analysis of the existing local and neighbourhood centres across the borough below based on key indicators to inform this study's recommendations for the hierarchy of local centres.

3.15 The table is not intended to provide an exhaustive list of all suitable criteria, and does not seek to define any specific thresholds (such as number of units, turnover, provision of specific facilities etc.) as it is the combination of the provision that would support designation within the hierarchy.

3.16 References to turnover within the assessment relate to convenience goods spending for 2024, and the number of key services is derived from Lichfields' Local Needs Index (LNI) Audit score (out of 16), corresponding to the number of categories of shops, services and community uses residents could expect to find within easy walking distance of their home.

3.17 In addition to the centres defined across the existing Local Plan hierarchy (Core Strategy Policy CP22 and Development Land Allocations DPD Policy R1), officers have identified Aylesford High Street, Wateringbury, and Wrotham for inclusion in the assessment. No other destinations have been identified from the household survey results that would indicate that they attract a substantial proportion of convenience or comparison goods trips for further assessment for classification within the retail hierarchy.

Table 3.3 Local Centre Hierarchy Indicators

Centre	Units	Convenience goods turnover	Convenience goods market share	Convenience goods units	Key services
Martin Hardie Way, Tonbridge	11	£3.1m	0.7%	3	5
York Parade, Tonbridge	15	£5.3m	1.2%	4	9
Twisden Road, East Malling	6	£2.2m	0.5%	1	4
Premier Parade Aylesford	6	£0.3m	0.1%	1	3
Woodlands Parade, Ditton	7	£1.5m	0.3%	1	3
Little Market Row, Leybourne	6	£2.3m	0.5%	1	4
East Peckham	4	-	-	1	4
Hadlow	9	£0.6m	0.1%	3	6
Hildenborough	6	£2.4m	0.5%	1	5
Leybourne Chase	3	-	-	1	2
Peter's Village	4	£0.5m	0.1%	1	3
Aylesford High Street	12	-	-	1	6
Wateringbury	6	£0.2m	0.04%	1	4
Wrotham	7	£0.2m	0.04%	1	3

3.18 With the exception of Premier Parade Aylesford, all existing Policy R1 centres are identified as drawing more than 0.3% of spending from study area residents (and more than £1.0m in turnover). As a proxy for pedestrian flows and trips to the respective centres, this would indicate that these destinations function as local centres, particularly given the clustering of key services provided.

3.19 Premier Parade Aylesford has a relatively small-scale convenience goods draw and limited provision of key services to compensate for this more local convenience offer. It functions as a small parade of neighbourhood significance and would not warrant continued inclusion within the retail hierarchy as a local centre.

3.20 Of the Policy CP22 centres, only Hildenborough attracts a notable convenience goods market share of £2.4m (0.5% of all convenience spending from across the study area) and features five key services despite being made up of just six units. Equally, whilst Hadlow attracts a smaller convenience goods turnover of £0.5m, it offers six key services. On this basis, both Hadlow and Hildenborough would warrant continued designation as local centres.

3.21 Leybourne Chase and Peter's Village are both located within new housing developments and in practical terms function as local neighbourhood parades as defined within the Government's 'Parades to be Proud of' publication. They would not justify classification within the retail hierarchy.

3.22 Looking beyond the centres identified within the existing hierarchies, only Aylesford High Street would warrant further consideration by virtue of the range of key services. However, the dispersed nature of these facilities, set at intervals along an extended stretch of road from the High Street to Rochester Road diminishes the offer and therefore would not appear to support classification in the retail hierarchy.

3.23 Finally, it is noted that the current hierarchies provide four different typologies of local centres across both the Core Strategy and Development Land Allocations DPD. There is limited value to this complexity and it is recommended that the hierarchy be simplified to classify the following 'local centres':

- Martin Hardie Way, Tonbridge
- York Parade, Tonbridge
- Twisden Road, East Malling
- Woodlands Parade, Ditton
- Little Market Row, Leybourne
- Hadlow
- Hildenborough

3.24 It is noted that large retail destinations such as South Aylesford Retail Park at Quarry Wood will continue to draw significant retail spending from the catchment. However, given the limited provision of non-retail services and public/administrative facilities and detachment from any existing centres, these locations do not warrant classification as designated centres within the retail hierarchy.

Assumptions and Base Data

3.25 All monetary values expressed in this study are at 2023 prices, consistent with Experian's base year expenditure figures for 2023, which are based on actual recorded expenditure levels rather than projections.

Study area zones

3.26 A household telephone survey was undertaken during June 2023. The primary catchment area of Tonbridge will extend beyond the borough boundary to the south. The study area is shown in Appendix 1. This study area has been sub-divided into five zones based on ward areas to reflect the primary catchment areas of the main centres in the borough.

3.27 The projected population within each zone between 2024 to 2042 is set out in Table 1 in Appendix 3, based on population estimates and projections provided by Iceni Projects, reflecting the latest standard method for assessing housing needs for Zones 1, 3-5 that make up the Tonbridge and Malling authority area. Population projections for Zone 2 are taken from Experian's latest 2024-based small area population estimates and projections, which are aligned with the Office of National Statistics 2018-based projections.

3.28 The base year 2024 population within the study area is 153,977. This population is projected to increase to 197,616 in 2042, an increase of +28.3%.

Retail expenditure

3.29 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 and convenience goods for each of the study area zones for the year 2023 have been obtained.

3.30 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 22, March 2025) has been used to forecast expenditure within the Tonbridge and Malling study area. Experian's short-term growth forecast rates during 2024, 2025 and 2026 reflect current economic circumstances, including Covid-19 and the cost-of-living crisis. The forecast changes during this period are as follows:

- convenience goods: -3.2%
- comparison goods: +0.4%
- leisure: -1.3%

3.31 These short-term forecasts reflect the on-going cost-of-living crisis during 2024. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2024, 2025 and 2026. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is expected to decline during 2022 and 2023.

3.32 In the longer-term it is more difficult to forecast year-on-year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: -0.3% decline per annum through to 2031 and -0.2% per annum beyond 2031;
- comparison goods: +2.5% growth per annum through to 2031 and +2.6% per annum beyond 2031; and
- leisure: +0.6% growth per annum through to 2031 and +0.7% per annum beyond 2031.

3.33 These growth figures relate to real growth and exclude inflation. The current high levels of inflation should not affect Experian’s long-term expenditure projections that are over and above inflation.

3.34 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2025 are:

- 5.2% of convenience goods expenditure; and
- 24.1% of comparison goods expenditure.

3.35 Experian's projections suggest that these percentages will increase to 7.3% and 29.3% by 2040, respectively.

3.36 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2042, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT.

Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.

3.37 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase by +18.8% from £444.7 million in 2024 to £528.3 million in 2042, as shown in Table 3 (Appendix 3).

3.38 Comparison goods spending is forecast to increase by +80.2% between 2024 and 2042, increasing from £528.7 million in 2024 to £952.8 million in 2042, as shown in Table 3 (Appendix 4).

3.39 Food and beverage spending is forecast to increase by +42.5% between 2024 and 2042, increasing from £305.0 million in 2024 to £434.7 million in 2042, as shown in Table 3 (Appendix 5).

Growth in turnover densities

3.40 Experian's Retail Planner Briefing Note 22 – March 2025 indicates that comparison goods retail sales floorspace is expected to increase its average sales density by only +0.3% during 2024 to 2025, representing a slow recovery from the cost-of-living crisis, but higher growth is envisaged thereafter in the medium and long-term (+1.6% per annum in 2026 and +2.3% per annum beyond 2027). These recommended increases have been adopted and will absorb much of the future expenditure growth. These growth rates are consistent with the expected increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

3.41 For convenience goods retail, Experian indicates a decrease of -2.4% during 2024 to 2026 while no growth is envisaged in the medium term (2026 to 2031) before another gradual decline (-0.1% per annum) is predicted in sales densities thereafter.

3.42 For leisure facilities, including food/beverage floorspace, Experian indicates a decrease of -2.3% during 2024 to 2025. Limited growth (+0.1% per annum) is envisaged in the medium and long-term (2026 to 2040).

Base year market shares

3.43 The turnover of facilities within the borough is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in June 2023.

3.44 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4 respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.

3.45 The household survey results suggest a relatively high level (almost 75%) of expenditure retention within the study area for convenience goods shopping as shown in Table 3.2. The retention of comparison goods expenditure is much lower (37% in the study area) due to the draw of larger centres outside the borough including Tunbridge Wells (25.8%), Maidstone (13.7%) and Bluewater (9.7%). The retention of food/beverage expenditure is higher than comparison goods shopping at over 56% retention in the study area.

3.46 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 3.4 Food and grocery trip retention in Tonbridge and Malling study area (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Tonbridge Urban	72.5	81.6	72.8	**74.4**
2 – Tonbridge Rural South	39.9	35.3	49.6	**41.9**
3 – Tonbridge Rural North	66.0	62.0	89.1	**72.1**
4 – Kings Hill / West Malling	90.6	92.0	92.7	**91.5**
5 – Snodland / Aylesford	80.1	76.7	84.7	**80.8**
All	**73.3**	**72.6**	**81.0**	**74.9**

Source: NEMS household survey results June 2023

3.47 Tonbridge and Malling's market shares are much higher in the northeastern Zones 4 (Kings Hill /West Malling) and Zone 5 (Snodland / Aylesford), showing a relatively high level of retention against the convenience draw of Chatham and Maidstone. Expenditure leakage is highest (58.1%) from Zone 2 (Tonbridge Rural South) primarily due to outflow to large food stores in Tunbridge Wells.

3.48 The primary main food and grocery destinations were as follows (% market share of convenience spending within all study area zones):

1. Sainsbury's Superstore, Angel Lane, Tonbridge (9.7%)
2. Aldi, Swanmead Way, Tonbridge (7.7%)
3. Tesco Extra, Lunsford Park, Aylesford (7.6%)
4. Asda, Alexander Grove, Kings Hill, West Malling (6.3%)
5. Sainsbury's Superstore, Quarry Wood, off London Road, Aylesford (4.9%)
6. Morrisons, New Hythe Lane, Aylesford (3.8%)
7. Aldi, Alexander Grove, Kings Hill, West Malling (3.7%)
8. Waitrose, Sovereign Way, Tonbridge (3.3%)
9. Sainsbury's Superstore, Linden Park Road, Tunbridge Wells (2.8%)
10. Little Waitrose, Fortune Way, Kings Hill, West Malling (2.2%)

3.49 These figures indicate that most residents undertake their food and grocery shopping (combined main food and top-up) close to where they live, albeit main food 'trolley' shopping trips are predominantly by car. The household survey results and distribution of food stores within and surrounding the study area suggest there is limited potential for the borough to increase its market share of convenience goods expenditure in the future, but the potential for further retail floorspace could arise in areas of high population growth.

3.50 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower, but still reasonable levels of comparison goods expenditure retention for all goods categories within most study area zones (with the notable exception of Zone 2), as shown in Table 3.3.

Table 3.5 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighed market share
1	31.9	23.0	5.3	21.0	18.8	68.7	62.6	41.1	19.1	**29.7**
2	8.7	2.8	4.9	5.3	5.2	32.4	15.2	33.8	15.0	**13.9**
3	14.2	31.4	36.5	22.6	50.9	47.2	42.3	51.1	24.4	**32.5**
4	21.7	83.4	79.9	43.1	88.6	59.7	56.7	83.5	24.4	**54.3**
5	7.4	78.9	65.4	47.4	73.4	42.4	45.1	78.2	16.9	**44.8**
All	**18.1**	**51.2**	**42.6**	**29.6**	**51.2**	**52.5**	**49.9**	**60.1**	**20.6**	**37.6**

Source: NEMS household survey results June 2023.

3.51 As with convenience goods shopping, Tonbridge and Malling's market shares are much lower in Zone 2, which lies outside the borough. The lowest levels of comparison goods expenditure retention (highest leakage or outflow) is from the south and centre of the borough, where leakage to Tunbridge Wells is high. Leakage is nonetheless relatively high across all zones (45% to 85%), whilst the highest proportional retention is in the north east of Tonbridge and Malling, albeit Maidstone and Bluewater each attract a notable proportion of comparison goods spending.

3.52 The survey results suggest good levels of expenditure retention for lower order comparison goods, such as toys/hobbies, health/beauty, DIY/hardware, and domestic electrical. The lowest market shares are for clothing/footwear (18%), furniture/floor-coverings/textiles (30%) and other non-food goods (21%), which suggests the borough's residents are more likely to travel further afield to purchase higher order comparison products e.g. clothing shopping trips to Tunbridge Wells, Maidstone, or Bluewater.

3.53 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 3.4.

Table 3.6 Food and beverage trip retention (% of all trips in study area zones)

Zone	Eating out	Drinking away from home	Combined market weighed share
1 – Tonbridge Urban	52.4	73.4	**56.6**

Zone	Eating out	Drinking away from home	Combined market weighed share
2 – Tonbridge Rural South	27.5	40.5	**30.1**
3 – Tonbridge Rural North	65.0	86.4	**69.3**
4 – Kings Hill / West Malling	67.8	71.6	**68.6**
5 – Snodland / Aylesford	43.1	52.6	**45.0**
All zones	**53.7**	**68.2**	**56.6**

Source: NEMS household survey results June 2023

3.54 The survey results suggest reasonable levels of food/beverage expenditure retention across most zones, excluding Zone 2 (Tonbridge Rural South, outside of the Borough) for both eating and drinking. Understandably, expenditure leakage is highest from the very north (towards Maidstone, Rochester and London) and very south of the borough (towards Tunbridge Wells). Retention rates are higher for drinking away from the home than eating out.

Capacity for Convenience Goods Retail Floorspace

3.55 Based on the market shares calculated from the June 2023 household survey results, available convenience goods expenditure attracted to the borough in 2024 is shown in Table 5 in Appendix 3. This expenditure has been projected forward to 2027, 2032, 2037 and 2042, and is summarised in Table 10 in Appendix 3. Convenience goods expenditure available to facilities in the borough is expected to increase from £325.6 million in 2024 to £393.0 million in 2042. This increase is almost entirely due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for facilities in each zone is set out in Table 3.5.

3.56 The benchmark turnover of the main food stores in the borough is calculated in Table 9 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

Table 3.7 Convenience goods base year turnover in 2024 (household survey based turnover)

Zone / Town	Turnover £m
1 - Tonbridge	108.18
3 - Borough Green	10.01
4 - Kings Hill	54.64
4 - Martin Square /Larkfield	28.66
4 - West Malling	7.46
5 - Snodland	10.26
Other Tonbridge and Malling	106.41
All Tonbridge and Malling Borough	**325.63**

Source: Table 10 in Appendix 3, excl. figures for Zone 2, which falls outside of Tonbridge and Malling.

3.57 The combined benchmark turnover of the main food stores is estimated to be about £314.7 million, as shown in Table 9 in Appendix 3. There are variations with Aldi at Swanmead Way and Sainsbury's on Angel Lane in Tonbridge, Morrisons in Larkfield, and Aldi and Little Waitrose in West Malling all trading particularly well. The household survey results suggest other convenience goods retail facilities in Kings Hill and West Malling, as well as smaller stores in Tonbridge town centre are trading below benchmark. Overall, this estimated benchmark turnover of the main stores alone suggests that convenience goods shopping facilities in the borough appear to be trading satisfactorily, and we consider that the convenience goods are collectively trading at equilibrium.

3.58 Table 11 in Appendix 3 subtracts the projected turnover of existing convenience goods floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future.

3.59 The figures shown in Table 10 indicate that there is a projected convenience goods expenditure surplus of £9.5 million at 2027 as population and expenditure growth offsets the projected increases in home shopping (SFT) and sales densities. Continued population growth results in a growing surplus of £29.5 million at 2032, rising to £50.0 million in 2037 and to £71.0 million in 2042. These projections suggest that the population growth would result in significant capacity for additional convenience goods facilities.

3.60 The surplus expenditure projections are converted into floorspace estimates in Table 11 in Appendix 3 based on a combined company average sales density of £12,137 per sq.m net (the 8 main food store operators). The results are summarised in Table 3.6.

3.61 Figures for 'Other Tonbridge and Malling' are spread across all out of centre facilities in the borough, based on current shopping patterns.

Table 3.8 Convenience goods floorspace cumulative capacity (sq.m gross)

Zone	2027	2032	2037	2042
1 - Tonbridge	330	1,060	1,810	2,590
3 - Borough Green	40	110	190	270
4 - Kings Hill	200	610	1,040	1,490
4 - Martin Square /Larkfield	100	330	560	790
4 - West Malling	30	90	140	200
5 - Snodland	40	110	200	290
Other Tonbridge and Malling	370	1,140	1,960	2,770
Total	**1,110**	**3,470**	**5,930**	**8,440**

Source: Table 11 in Appendix 3, excl. figures for Zone 2, which falls outside of Tonbridge and Malling.

3.62 The expenditure surplus projections imply a combined under-supply of convenience goods floorspace of 1,110 sq.m gross in the borough in 2027, rising to 8,440 sq.m gross in 2042. For context, Experian Goad data for Tonbridge suggests an average unit size of 240 sq.m, and an average convenience unit of 400 sq.m.

3.63 This equates to a theoretical statistical capacity for three to four large food stores (+2,500 sq.m net) over the plan period. More specifically, on the basis of the current distribution of market share, this results in spending spread across each centre with theoretical capacity for a large food store, or two medium-sized discount food stores (c. 1,400 sq.m net) in Tonbridge, and one medium-sized discount food store in Kings Hill.

3.64 However, we are cognisant that the capacity is largely derived from projected population growth associated with the standard method, and the council's chosen housing strategy is likely to play a larger role in the location of the identified capacity (particularly within any new local centres planned to support the emerging population) than existing shopping patterns and market shares.

Qualitative need

3.65 Convenience goods retail provision in the borough is set out in Table 9 in Appendix 3. Collectively the five main centres have 44 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across the borough have good access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates shown in Table 3.2.

3.66 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are four food superstores (over 2,500 sq.m net) in the Borough, as follows:

- Tesco Extra, Aylesford (5,489 sq.m net);
- Sainsbury's, Aylesford (4,528 sq.m net);
- Asda, West Malling (3,897 sq.m net); and
- Sainsbury's, Tonbridge (2,573 sq.m net).

3.67 Other food superstores in Maidstone, Medway and Sevenoaks are also reasonably accessible for some residents in the borough. In addition to these food superstores, there is good choice of other large stores / supermarkets and smaller convenience stores. The discount food sector is well represented with three Aldi stores and two Lidl stores.

3.68 Household survey respondents who had visited centres in the borough in the last six months, were asked what they like about town centres and what improvement would make them visit more often. The results indicate greater levels of satisfaction than dissatisfaction with supermarket provision in the town centres (11% and 1%, respectively). The highest levels of supermarket satisfaction were recorded in Kings Hill. The highest levels of dissatisfaction were recorded in Snodland.

3.69 The household survey results indicated a slightly lower level of satisfaction with the provision of other small foods shops (e.g. bakers/butchers/greengrocers), albeit a notably higher level of satisfaction (13%) was recorded in Martin Square Larkfield. However, as indicated in Section 5, all centres have a reasonable proportion of convenience goods retail uses. There are no obvious areas of deficiency in food store or convenience goods provision in Tonbridge and Malling.

Capacity for Comparison Goods Retail Floorspace

3.70 Available comparison goods expenditure has been projected to 2027, 2032, 2037 and 2042 and is summarised in Table 10 in Appendix 4. Comparison goods expenditure available to facilities in the borough is expected to increase from £192.7 million in 2024 to £353.3 million by 2042.

3.71 Table 10 in Appendix 4 subtracts the turnover of existing facilities including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

3.72 By 2027 there is a projected expenditure surplus of £6.5 million, increasing to £70.5 million by 2042. The projections suggest expenditure growth above the growth in turnover densities (largely resulting from projected population growth) and there is likely to be an under-supply of comparison goods retail floorspace through to 2042. The expenditure projections have converted into floorspace estimates Table 11 in Appendix 4. The results are summarised in Table 3.7.

3.73 The surplus expenditure projections imply a combined under-supply of comparison goods floorspace in the borough of 1,260 sq.m gross in 2027 increasing to 9,810 sq.m gross in 2042. Notably, Martin Square Larkfield takes around half of the forecast statistical capacity on the basis of current market shares and the ongoing attraction of existing facilities such as South Aylesford Retail Park.

Table 3.9 Comparison goods floorspace cumulative capacity (sq.m gross)

Zone	2027	2032	2037	2042
1 - Tonbridge	300	940	1,600	2,340
3 - Borough Green	10	30	40	70
4 - Kings Hill	90	260	430	630
4 - Martin Square /Larkfield	540	1,710	2,860	4,190
4 - West Malling	30	90	140	210
5 - Snodland	-	-	-	-
Other Tonbridge and Malling	300	960	1,610	2,370
Total	**1,260**	**3,990**	**6,700**	**9,810**

Source: Table 11 in Appendix 4, excl. figures for Zone 2, which falls outside of Tonbridge and Malling.

Qualitative need

3.74 Collectively the six designated centres in Tonbridge and Malling have 88 comparison goods outlets. Units at Cannon Lane, Tonbridge (Tonbridge Retail Park and Swanmead Way) and Quarry Wood (South Aylesford Retail Park) also have a good provision of large out of centre comparison goods stores including B&M, Home Bargains, and Currys. Out of centre comparison stores and retail warehouse parks provide circa. 20,000 sq.m gross floor area.

3.75 As indicated earlier in the section, the borough has a reasonable comparison good retail offer, with Tonbridge as the largest centre in terms of the number of comparison goods retailers. The five district centres have a more limited and proportionate comparison goods offer. The retention of comparison goods expenditure is reasonable (around 37%) given the leakage to higher order centres such as Tunbridge Wells (26%), Maidstone (14%) and Bluewater (10%).

3.76 The analysis of centres in Appendix 2 indicates the range and choice of comparison goods shops varies from centre to centre. Most categories of comparison goods shops are available in Tonbridge but the choice within some categories is limited. The range of comparison goods shops is also reasonable in West Malling, but the choice of shops in some categories is more limited, as would be expected given the difference in scale compared to Tonbridge. The range and choice of comparison shops in the other smaller centres varies but is generally limited with some categories not represented and the choice of shops within each category is small.

3.77 Notwithstanding the range and choice of comparison goods shops in Tonbridge in the south of the study area, residents in the catchment areas (Zones 1-3) have good access to extensive facilities and national multiples in Tunbridge Wells. Residents in Kings Hill, Martin Square Larkfield, West Malling and Snodland have good access to facilities in Maidstone.

3.78 The household survey results indicate slightly higher levels of dissatisfaction with non-food shops in general provision in the borough's town centres than satisfaction (5.8% and 8.0%, respectively). The highest levels of non-food shop satisfaction were recorded in West Malling (14%), whilst the highest levels of dissatisfaction were recorded in Tonbridge (18%).

3.79 Levels of satisfaction were higher (+2.6% net) for the range of independent/specialist shop and affordability of shops (+1.3%), but there were higher levels of dissatisfaction for the range of clothing shops (-6.8%), the range of high street multiples (-1.9% net).

3.80 Overall, the accessibility to a range and choice of comparison goods shopping destinations for residents of Tonbridge is reasonable, supported but the offer across out of centre retail parks and the proximity of facilities in Tunbridge Wells and Maidstone.

Capacity for Food/Beverage Floorspace

3.81 Available food and beverage expenditure has been projected forward to 2027, 2032, 2037 and 2042, and is summarised in Table 10 in Appendix 5. The amount of expenditure attracted to the borough is expected to increase from £161.2 million in 2024 to £234.7 million in 2042. Table 10 in Appendix 5 subtracts the turnover of existing facilities from available expenditure to calculate the amount of surplus expenditure available for new development. In 2024 there is an expenditure surplus of +£9.8 million. Continued population and expenditure growth creates an expenditure surplus of £28.9 million in 2032 increasing to £70.9 million by 2042. Floorspace capacity projections are shown in Table 11 in Appendix 4 and summarised in Table 3.8 below.

Table 3.10 Food / beverage floorspace cumulative capacity (sq.m gross)

Zone	2027	2032	2037	2042
1 - Tonbridge	570	1,700	2,870	4,110
3 - Borough Green	10	40	70	110
4 - Kings Hill	90	270	460	660
4 - Martin Square /Larkfield	90	240	410	590
4 - West Malling	310	940	1,600	2,290
5 - Snodland	-	-	10	10
Other Tonbridge and Malling	660	1,930	3,290	4,690
Total	**1,740**	**5,130**	**8,700**	**12,460**

Source: Table 11 in Appendix 5, excl. figures for Zone 2, which falls outside of Tonbridge and Malling.

Qualitative need

3.82 Collectively, food/beverage provision in the six designated town and district centres across the borough is made up of 49 restaurants/cafés, 11 pubs/bars, and 30 hot food takeaways. Proportionately, Snodland has the weakest provision of facilities serving the evening economy and the provision of pubs/bars in most centres is relatively weak; however, the centres across Tonbridge and Malling generally provide a good range and choice of restaurants/cafes and hot food takeaways.

3.83 The household survey results indicate higher levels of satisfaction than dissatisfaction with the provision of cafés/restaurants in the town centres (15.5% compared with 4.5%, or +11% net). The highest levels of satisfaction were recorded in West Malling (33%), Borough Green (18%) and Tonbridge (15%). The highest level of dissatisfaction was recorded in Snodland (12%).

3.84 The household survey results indicate more mixed views regarding pub/bar provision, with closer levels of satisfaction (3.5%) and dissatisfaction (1.7%). The highest levels of satisfaction was recorded in West Malling (11%). The highest levels of dissatisfaction were again recorded in Snodland (12%). Views were generally mixed in other centres.

Operator Space Requirements

3.85 The Requirement List publishes potential space requirements for multiple retail and food/beverage operators. The current (May 2025) list of operators who may have space requirements in the borough are as follows:

Tonbridge

- Lidl — supermarket — 18,000 to 26,000 sq ft
- British Heart Foundation — charity fashion and home store — 1,500 to 14,000 sq ft
- Matalan — fashion and homeware retailer — 15,000 to 25,000 sq ft
- PDSA — charity shop — 1,000 to 3,000 sq ft
- The Range — home, garden and leisure — 20,000 to 80,000 sq ft
- Papa Johns — pizza delivery and takeaway — min. 1,000 sq ft
- Taco Bell — Mexican fast food — 1,200 to 1,800 sq ft
- McMullen & Sons — pub and brewery — 2,500 to 5,000 sq ft
- Wendy's — American fast food — 2,000 to 3,000 sq ft

Snodland

- Lidl — supermarket — 18,000 to 26,000 sq ft

3.86 In total, there are 9 operators listed as having potential space requirements in the borough with a potential total floorspace requirement of at least 62,200 sq ft gross (5,780 sq.m), as follows:

- Convenience goods retailers — 1 — (over 1,700 sq.m gross)
- Comparison goods retailers — 4 — (over 3,500 sq.m gross)

- Food/beverage operators 4 (over 600 sq.m gross)

3.87 Notably, Lidl has space requirements listed for more than one centre (Tonbridge and Snodland), which suggests that their requirement may relate to a general area of search rather than a specific town. Furthermore, some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in the borough, therefore the total number of requirements and amount of floorspace outlined above should be treated with caution.

3.88 There appears to be strong interest from the fast food, discount retail and charity shop sectors. Some of this interest may have been met by recent developments and planning applications elsewhere e.g. in nearby Tunbridge Wells. Lidl has interest at various sites across Kent, East Sussex and East Surrey; Lidl's interest in Tonbridge requires a store relocation.

3.89 Interest from national multiple comparison goods retail operators is focused primarily in Tonbridge (4 listed requirements). There are currently no active requirements from retailers or food/beverage operators for Borough Green, Kings Hill, West Malling and Martin Square/Larkfield.

4.0 Requirements for Commercial Leisure Space

4.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. The demand for office uses (now included in the new Use Class E) needs to be assessed in the context of the wider need for Class B employment uses, as part of the separate Economy Study.

4.2 Residents in the borough have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring settlements including Maidstone, Medway, Tunbridge Wells and Sevenoaks. Rail access to facilities within Central London also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, Entertainment and Cultural Floorspace Capacity

4.3 Experian's projections and local expenditure data for the study area indicates the resident population generates £58.9 million in 2024 (an average of around £380 per person on selected cultural, recreational and sporting services, including as follows:

- live entertainment i.e. theatre/concerts/shows;
- museums, theme parks, houses and gardens;
- admissions to clubs, dances, discos, bingo;
- other miscellaneous entertainment;
- subscriptions to sports and social clubs; and
- leisure class fees.

4.4 Leisure/entertainment/cultural spend from residents will not all be spent locally in Tonbridge and Malling borough. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 4.1. Only 10% of households do not participate in any of the nine leisure activities explored by the household survey.

4.5 The participation and retention rates vary significantly for each activity. Many residents travel outside the study area e.g. to London, Tunbridge Wells, Rochester and Maidstone for leisure activities. The retention rate is highest for trips to health/fitness and indoor/soft play but much lower for bingo, tenpin bowling, and museum/art gallery visits. There are no cinema trips within the study area as there are no cinema venues. These results suggest Tonbridge and Malling residents are prepared to travel further especially for cinemas, theatres, bingo, tenpin bowling, and museum/art gallery activities. Facilities in London attract a high proportion of theatre (60.2%) and museum/art gallery (71.3%) trips.

Table 4.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% households participating	% trips attracted to Tonbridge and Malling
Cinema	48.1	0.0
Theatre	43.8	3.5
Nightclubs / live music venues	17.6	14.7
Bingo	3.5	9.2
Gyms / health and fitness club	27.1	79.6
Indoor / soft play	11.0	64.6
Tenpin bowling / gaming	25.1	0.8
Trampoline parks	13.6	15.7
Museums / art galleries	41.7	1.5

Source: NEMS household survey results June 2023

4.6 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, a weighted average (accounting for differences in spending) estimates that the borough retains about 40% of resident's total leisure, entertainment and cultural expenditure within the study area, due to the borough's proximity to other leisure destination in other larger towns. Based on this estimated 40% market share, attracted leisure expenditure in 2024 is about £23.6 million.

4.7 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +4.1% between 2024 to 2032, and by +7.2% again between 2032 to 2042. With population growth (+17.2% by 2032, and +42.5% by 2042) on these leisure/cultural activities expenditure should increase from £58.9 million in 2024 to £62.2 million by 2027, £69.0 million by 2032, £76.2 million by 2037, and then £83.8 million in 2042. This equates to an additional £3.3 million of spending by 2027, £10.1 million by 2032, £17.3 million by 2037 and £24.9 million by 2042.

4.8 As a minimum, it is reasonable to assume Tonbridge and Malling Borough can continue to retain 40% of this expenditure growth i.e. about £10.0 million in 2042. However, there should be potential for the borough to increase its market share of expenditure growth. The development strategy could seek to retain 50% of the future expenditure growth, which is more consistent with the market share for retail and food/beverage expenditure. On this basis, retained expenditure growth could be £1.7 million in 2027, £5.0 million in 2032, £8.6 million in 2037, increasing to £12.4 million by 2042.

4.9 Based on Lichfields experience, leisure floorspace normally trades on average around £2,500 per sq.m gross. If leisure/cultural expenditure attracted to Tonbridge and Malling borough, were to trade at the levels indicated above, then this additional expenditure could support about 660 sq.m gross of new commercial leisure and cultural floorspace by 2027, based on an assigned average of £2,500 per sq.m in 2024, increasing to about 2,000 sq.m by 2032, 3,420 sq.m by 2037, and then to 4,900 sq.m by 2042.

Table 4.2 Leisure, entertainment and cultural floorspace cumulative capacity (sq.m gross)

	2027	2032	2037	2042
Tonbridge and Malling	660	2,000	3,420	4,900

4.10 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

4.11 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However, the number of trips 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 dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. The British Film Institute reports that total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019. Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis.

4.12 The number of trips during the Covid-19 crisis reduced significantly. The latest 2024 figures indicate 126.5 million cinema trips were made in the UK (about 1.8 trips per person), which remains 28% below pre-Covid levels (176 million). The cinema assessment for Tonbridge and Malling assumes trip levels comparable with the latest UK average i.e. 1.8 trips per person per annum.

4.13 The UK Film Distributors' Association identities 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINeSCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.

4.14 The Tonbridge and Malling study area's population is 153,977 in 2024, which based on the national averages above, would generate 277,159 cinema trips, which could theoretically support 7.3 cinema screens in 2024.

4.15 There are no full-time or part-time cinemas in Tonbridge and Malling, and therefore no cinema trips are retained within the borough. However, if 40% of cinema trips could be retained, in line with the borough's current leisure market share, then there is theoretical scope for a cinema with three screens.

4.16 Based on the household survey results, borough residents who visit the cinema go to facilities outside the study area, mainly to:

- Odeon, Knights Park, Tunbridge Wells – 9 screens (43.3% of participating households);
- Cineworld, Medway Valley Leisure Park, Rochester – 9 screens (21.5%); and
- Odeon Luxe, Lockmeadow Entertainment Centre, Maidstone – 8 screens (17.9%).

4.17 Population within the study area is projected to increase 28.3% from 153,977 to 197,616 by 2042, which could generate an additional 78,549 cinema trips. These additional trips could in theory support two cinema screens. If the borough attracted 40% of these trips (142,283 of 355,708 total trips), then the theoretical capacity in the borough would be about four screens.

4.18 Existing cinema provision in Tunbridge Wells, Maidstone, Rochester and other surrounding settlements may limit operator demand for a new facility within the study area. Despite the theoretical capacity for a medium-sized cinema, operator demand for a facility in Tonbridge and Malling appears unlikely.

Theatres, Nightclubs and Live Music

4.19 The household survey results indicate a relatively high proportion (43.8%) of respondents in the study area visit theatres, broadly on par with cinema trips. A sizable 41.7% visit museums/art galleries and 17.6% visit nightclubs/live music venues.

4.20 The Theatre Trust estimates there are over 1,100 active theatres in the UK, which is on average around one venue per 62,000 people. Experian expenditure data suggests £3.5 billion was spent by UK residents on live entertainment (i.e. theatres, concerts and shows) in 2023, which is about £52 per person. Total live entertainment expenditure was around £3.2 million per theatre venue in the UK in 2023, based on the Theatre Trust's estimate (1,100 venues).

4.21 Experian's local expenditure data indicates the Tonbridge and Malling study area generated £15.6 million on live theatre, concerts and shows in 2024, which was projected to increase to £21.9 million in 2042. Based on the average ticket revenue per venue (£3.2 million), Tonbridge and Malling's local population currently generates theoretical demand for about 4.9 venues. This theoretical demand could increase to 6.8 venues in 2041. If the borough retained about 40% of future theatre trips generated by residents in the study area (based on the current overall leisure market share) then there is theoretical demand for two to three venues over the plan period.

4.22 Tonbridge and Malling's existing provision includes EM Foster Theatre and The Oast Theatre in Tonbridge. This provision appears to be broadly in line with the theoretical demand generated by the study area's population. Based on the existing provision, there is no clear need for additional facilities. However, based on the existing market shares, the population could potentially accommodate an additional venue over the plan period if there is sufficient operator interest.

4.23 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

4.24 The household survey results suggest only 17.6% of households visit nightclubs/music venues and of these participating households, only 14.7% of trips generated by the study area are retained within Tonbridge and Malling. Approximately 28% of participating households are attracted to facilities in London, around 18% are attracted to Tunbridge Wells and about 13% to Maidstone.

4.25 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc. is only £5.3 million within the Tonbridge and Malling study area in 2024, growing to £7.6 million by 2042. Nonetheless, given current market shares, access to nightclub/live music venues in London, Tunbridge Wells and Maidstone is likely to continue to limit demand for additional facilities in Tonbridge and Malling.

4.26 Experian's local expenditure data indicates the Tonbridge and Malling study area generates £8.1 million on museums, theme parks, houses and garden in 2024. Leisure expenditure, including population growth, is projected to increase to £11.6 million by 2042, an increase of £3.5 million in expenditure or around £200,000 per annum over the plan period.

4.27 The household survey results suggest 41.7% of households visit museums/art galleries, but of these participating households only 1.5% of trips generated by the study area are retained within Tonbridge and Malling. Existing provision in the borough of museums/galleries and other cultural attractions include ArtSpring Gallery and Toy Museum in Tonbridge, The Gallery and The Kings Hill Art Company in West Malling, and Ightham Mote in Ivy Hatch. Over 70% of participating households are attracted to facilities in London.

4.28 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase Tonbridge and Malling's market share and attract more demand from tourist visitors if provision is improved. The development strategy for this entertainment and cultural sector needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and Fitness Clubs

4.29 The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.

4.30 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was in a state of growth pre-Covid, whilst the latest 2024 report suggests that the sectors market value has recovered above 2019 levels. In 2019, there were 10.4 million fitness members in the UK and the industry was worth £5.1 billion with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, and the number of clubs reduced by 176. By 2024, the number of members had climbed beyond pre-Covid levels, with a commensurate market value of £5.9 billion and a participation rate of 15.6%. However, the overall number of gyms remains below 2019 levels, at 7,009, having grown just 0.2% from 2023 to 2024.

4.31 The household survey results indicate 27.1% of households visit health and fitness gyms, which is higher than the current national average participation rate of less than 15%. The survey results also suggest that Tonbridge and Malling retains 79.6% of gym trips in the study area equating to a total catchment population of about 122,566 in 2024 (of which 33,215 residents currently visit health and fitness gyms).

4.32 The Sport England/Active Places data indicates that there are 18 registered health and fitness facilities in Tonbridge and Malling with 1,032 fitness stations, as summarised in Table 4.2. The study area population (153,977 in 2024) suggests an average of 6.7 fitness stations per 1,000 people. Based on the current estimated catchment population and trip retention rate, there are an average of 31.1 fitness stations per 1,000 people.

4.33 The South East Region has 1,259 Sport England registered health and fitness facilities with 74,411 fitness stations (average of 59 stations per facility). This existing provision equates to 7.8 registered fitness stations per 1,000 people in the South East Region. These figures suggest Tonbridge and Malling Borough has a reasonable provision of health and fitness facilities, with around one less fitness station per 1,000 people than the regional average.

Table 4.2 Tonbridge and Malling health and fitness facilities

Name	Type	Fitness Stations
Angel Centre, Tonbridge	Registered Membership Use	84
Hugh Christie School, Tonbridge	Private Use	6
Judd School, Tonbridge	Private Use	13
Pure Gym, Tonbridge	Registered Membership Use	220
Snap Fitness, Tonbridge	Registered Membership Use	150
Tonbridge School Centre, Tonbridge	Sports Club / Community Assoc.	55
Hadlow College, Tonbridge	Private Use	8
Hilden Health & Fitness Club, Tonbridge	Registered Membership Use	40
Nizels Golf & Country Club, Tonbridge	Registered Membership Use	72
Spirit Health Club, Maidstone, Sevenoaks	Registered Membership Use	23
David Lloyd, Kings Hill, West Malling	Registered Membership Use	120
Evolution Strength and Fitness, Aylesford	Registered Membership Use	35
Infinity Fitness UK, West Malling	Registered Membership Use	39
Malling School, West Malling	Sports Club / Community Assoc.	20
Holmesdale School, Snodland	Private Use	8
Larkfield Leisure Centre, Aylesford	Pay and Play	75
Snodland Community Centre, Snodland	Pay and Play	14
Reynolds Retreat, Sevenoaks	Registered Membership Use	50
Total		**1,032**

Source: Sport England Active Places March 2025

4.34 Demand for additional facilities within Tonbridge and Malling could arise from future population growth and/or increased participation rates. Population within the study area is projected to increase to 197,616 in 2042, an additional 43,639 people. Tonbridge and Malling's catchment population in 2042 should be about 157,302 (79.6% of 197,616). Based on the existing average of 6.7 fitness stations per 1,000 people, the borough's health and fitness catchment population of 157,302 could support 1,054 fitness stations, which suggests sufficient provision of fitness stations in the borough over the plan period.

4.35 In addition to population growth translated into fitness stations, an alternative approach could be based on Experian leisure expenditure projections. The Tonbridge and Malling study area population generates around £17.1 million on subscriptions to sports and social clubs in 2024, which equates to about £16,600 per fitness station.

4.36 Based on population and Experian's leisure expenditure projections, expenditure on this activity in the study area should increase from £17.1 million in 2024 to £24.5 million in 2042, an additional £7.4 million. Tonbridge and Malling's share of this growth should be £5.9 million (about 80%). Based on £16,600 per fitness station, this additional expenditure could support 357 new fitness stations by 2042, sufficient to support two large facilities or five medium-sized facilities. This alternative projection is notably higher than the surplus of fitness stations suggested through population growth alone, suggesting that it is driven more by overall spending growth patterns. As such, we would not suggest that the council actively plans for this potential capacity through a specific allocation and considers any planning applications for such facilities over the course of the plan period on its own merits.

Tenpin Bowling and Other Indoor Leisure Activities

4.37 As summarised in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms, etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

4.38 There are no tenpin bowling/family entertainment facilities in Tonbridge and Malling Borough. The nearest facilities are tenpin outlets in Tunbridge Wells (Hollywood Bowl - 24 lanes), Maidstone (Hollywood Bowl - 24 lanes), Rochester (Hollywood Bowl - 24 lanes), Chatham (Lordswood Ten Pin Bowling Centre - 6 lanes; Chatham (Chatham Bowl - 16 lanes) and Bexleyheath (Tenpin - 28 lanes).

4.39 The household survey results indicate 25.1% of households visit ten-pin bowling/gaming facilities. The Tonbridge and Malling study area's future 2042 population (197,616) can theoretically support 16 lanes, based on the national average of one lane per 12,000 people. There is theoretical capacity for a small tenpin bowling/family entertainment facility in the study area, but the existing provision in surrounding areas is sufficient to meet resident demand up to 2042 and may limit operator interest in providing a new facility.

4.40 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 variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014. 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 for all ages and abilities, as well as an arcade and party rooms.

4.41 The household survey results indicate 13.6% of respondents in the study area visit trampoline centres. Trampoline destinations mentioned by households participating in this activity were as follows:

- Jump In Trampoline Parks, Tonbridge (13.3% of participating households);
- Minormania, Tonbridge (2.3%);
- Gravity Active, Maidstone (43.1%);
- Gravity Active, Greenhithe (22.1%);
- Flipout, Chatham (5.8%);
- Soar, Gillingham (3.6%);
- Jumpers Rebound Centre, Gillingham (1.0%);
- Mote Park, Maidstone (1.0%); and
- Minormania, Tunbridge Wells (0.9%).

4.42 There may be potential scope for further provision in Tonbridge and Malling, but this sector is still relatively new and its potential for continued growth is unclear. The council's strategy should be flexible to respond to any emerging demand for trampoline parks or soft play centres.

4.43 The number of escape rooms in the UK grew rapidly in the 4 years before the Covid pandemic, increasing from about 600 at the end of 2016 to almost 2,000 by 2024. The market is fragmented and is still relatively new. Tonbridge and Malling currently features one escape room at Hop Farm Country Park. There are also a number of facilities located across centres surrounding the borough including Maidstone, Tunbridge Wells, Sevenoaks, and Chatham. It is not clear whether this sector is approaching saturation point, therefore a flexible strategy is required.

Bingo and Games of Chance

4.44 Gala (now Buzz Bingo) 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. However, the significant increase in on-line gambling has, and will continue to affect this sector. The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo.

4.45 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has:

- 582 bingo halls;
- 175 casinos;
- 1,405 adult gaming centres;
- 191 family entertainment centres; and
- 6,661 betting shops.

4.46 This equates to approximately one bingo facility per 93,000 adults, one casino per 310,000 adults and one family entertainment centre per 280,000 adults.

4.47 The household survey results indicate that only 3.5% of respondents in the study area visit bingo facilities, which is lower than the UK average participation rates of around 5%. There are no main bingo facilities in Tonbridge and Malling borough, but bingo events are held at other venues on a part-time basis. The nearest major bingo destinations mentioned by households participating in this activity were Buzz Bingo in Rochester and Maidstone.

4.48 Tonbridge and Malling's market share of bingo trips in the study area is 9.2%. The adult population (about 150,000 in 2042) in the study area is theoretically capable of supporting 1.6 bingo facilities and 0.5 casinos, based on the UK averages. However, the low participation and retention rates indicate there may be limited operator demand to deliver such facilities in Tonbridge and Malling borough.

Conclusions on Commercial Leisure and other town uses

4.49 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Tonbridge and Malling. Given the fragmented nature of these sectors, it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

4.50 In global terms, future expenditure growth could support new commercial leisure and cultural floorspace in Tonbridge and Malling of:

- about 2,000 sq.m by 2032;
- about 3,400 sq.m by 2037; or
- about 4,900 sq.m by 2042.

4.51 This additional floorspace *could* include:

- two large or five medium sized health and fitness facilities (at least 357 new fitness stations);
- other new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
- small-scale tourist attractions/cultural facilities.

4.52 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist-related facilities. The opportunities to reoccupy vacated retail space should also be considered.

5.0 Growth Opportunities

Accommodating growth and change

National guidance

5.1 For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:

- defining a network and hierarchy of centres, allowing then to grow and diversify;
- defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
- allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

5.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. 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. However, as indicated in Section 2, the recent changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) significantly restrict the council's ability to control the mix of uses within centres through a plan-led approach.

5.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need to focus on providing a better service and experience. This enhanced experience could be improvements to the range of activities on offer (including innovative activities), the built environment and green infrastructure. The potential to provide a better mix of uses that extend activity throughout the daytime and into the evenings may also contribute to the viability and attraction of town centres.

5.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. 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 over a minimum ten-year period 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.

5.5 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests. The sequential test in the NPPF indicates main town centre uses should locate 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 (para. 91). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 92).

5.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

5.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to continue to grow following shifts in customer behaviour accelerated by the Covid-19 crisis. Experian forecasts that the proportion of convenience goods spending on-line (adjusted to account for spending through physical stores) is projected to increase from 2.5% in 2025 to 7.3% by 2040, whilst the proportion of comparison goods purchased online is projected to grow from 24.1% to 29.3%. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

5.8 As set out in Section 2, the UCO was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

Floorspace capacity projections

5.9 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been excluded. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

5.10 The assessment of the potential for new retail and food/beverage floorspace within the previous sections suggests that there is long-term scope for new development within Tonbridge and Malling, driven by population growth. Tables 5.1-3 below summarise the floorspace projections in Tonbridge and Malling up to 2042 (cumulative).

5.11 As indicated in Section 2, long term projections have inherent uncertainties, but it is better to plan for higher growth and then modify the strategy later if levels of growth are lower than originally predicted. Despite the uncertainties relating to very long-term projections, the emerging Local Plan should reflect that committed permissions at South Aylesford Retail Park account for the immediate retail floorspace capacity, at least up to 2032. These projections assume Tonbridge and Malling can maintain its market share of expenditure in the future. This approach recognises that additional development within Tonbridge and Malling could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres e.g. Tunbridge Wells, Maidstone and Bluewater. A balanced and sustainable approach has been adopted.

5.12 Table 5.1 indicates there is a combined projected requirement for Tonbridge and Malling of 12,590 sq.m gross in 2032, this excludes Zone 2 which falls outside of Tonbridge and Malling. By 2037, the combined cumulative requirement increases to 21,330 sq.m gross (Table 5.2) and then to 30,710 sq.m gross in 2042 (Table 5.3). The scope for retail floorspace broadly correlates to the locations where population growth is anticipated e.g. in higher tier centres and strategic development sites across the borough. In the short term, these capacity projections need to be considered in terms of the availability of existing vacant floorspace that may be suitable to accommodate this projected growth.

5.13 Over the plan period, the future distribution of growth associated with the council's spatial strategy needs to be considered in identifying the locations of new retail floorspace. Given the identified capacity is largely driven by population growth, it is anticipated that emerging housing delivery sites may include local or neighbourhood scale centres that would account for a significant proportion of the capacity identified.

Table 5.1 Combined retail, food/beverage, leisure, entertainment floorspace capacity up to 2032 (sq.m gross)

Zone / Area	Convenience retail	Comparison retail	Food / Beverage	Total
1 - Tonbridge	1,060	940	1,700	3,700
3 - Borough Green	110	30	40	180
4 - Kings Hill	610	260	270	1,140
4 - Martin Square /Larkfield	330	1,710	240	2,280
4 - West Malling	90	90	940	1,120
5 - Snodland	110	-	-	110
Other Tonbridge and Malling	1,140	960	1,930	4,030
Total	**3,470**	**3,990**	**5,130**	**12,590**

Table 5.2 Combined retail, food/beverage, leisure, entertainment floorspace capacity up to 2037 (sq.m gross)

Zone / Area	Convenience retail	Comparison retail	Food / Beverage	Total
1 - Tonbridge	1,810	1,600	2,870	6,280
3 - Borough Green	190	40	70	300
4 - Kings Hill	1,040	430	460	1,930
4 - Martin Square /Larkfield	560	2,860	410	3,830
4 - West Malling	140	140	1,600	1,880
5 - Snodland	200	-	10	210
Other Tonbridge and Malling	1,960	1,610	3,290	6,860
Total	**5,930**	**6,700**	**8,700**	**21,330**

Table 5.3 Combined retail, food/beverage, leisure, entertainment floorspace capacity up to 2042 (sq.m gross)

Zone / Area	Convenience retail	Comparison retail	Food / Beverage	Total
1 - Tonbridge	2,590	2,340	4,110	9,040
3 - Borough Green	270	70	110	450
4 - Kings Hill	1,490	630	660	2,780
4 - Martin Square /Larkfield	790	4,190	590	5,570
4 - West Malling	200	210	2,290	2,700

Zone / Area	Convenience retail	Comparison retail	Food / Beverage	Total
5 - Snodland	290	-	10	300
Other Tonbridge and Malling	2,770	2,370	4,690	9,830
Total	**8,440**	**9,810**	**12,460**	**30,710**

Source: Tables 3.6, 3.7 and 3.8 (rounded). Note: no figures for Zone 2, which falls outside of Tonbridge and Malling.

5.14 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years.

5.15 As set out above, the floorspace projections do not take account of extant planning permission or pipeline proposals and should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. From an overview of the council's database of permissions for new retail floorspace that could come forward over the next few years, we have identified the expansion of South Aylesford Retail Park at Quarry Wood, which was first approved (TM/19/00979/FL) in 2019, with a subsequent Lawful Development Certificate (23/00202/LDE) in 2023 confirming that the works had been implemented and that the permission remains extant.

5.16 The permission allows for the development of between two and three additional retail units across two different scenarios allowing for up to 4,877 sq.m (gross) of comparison goods floorspace, or a combination of 2,323 sq.m floorspace for a convenience goods discount foodstore and 1,626 sq.m comparison goods floorspace (gross). The combined cumulative retail floorspace projection to 2041 is 5,870 sq.m gross. The scenarios for the extension of South Aylesford Retail Park take up a significant quantum of the identified capacity for new retail floorspace over the plan period.

5.17 The projections in this report provide a starting point for the review of site-specific allocations and development management policies. To accommodate growth, local planning authorities should keep town centre boundaries under review. Not all retail floorspace will come forward in town centre locations; an element of local provision will be necessary to support the emerging population across strategic housing allocations.

5.18 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provide an opportunity to enhance the evening and night-time economy in centres in Tonbridge and Malling, including the repurposing of retail floorspace. However, the nature and formats of these sectors are constantly evolving to reflect changing customer demands and the commercial viability of such uses. We would caution against any specific commercial leisure allocations without express landowner and/or operator interest.

5.19 The emerging Local Plan should recognise and foster the potential for additional food / beverage and commercial leisure development over the plan period (particularly when aligned with any new mixed-use and residential schemes), albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

Vacant shop premises

5.20 The existing stock of premises should have a role to play in accommodating any projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant retail/service premises could help to accommodate future growth.

5.21 Goad Plans and Lichfields' land use surveys indicate there were 38 vacant shop units within the 6 designated centres in Tonbridge and Malling, an average vacancy rate of 7.1%, which is significantly below both the UK average (14.4%) and the pre-Covid UK average (12.4%). Based on business rate data from the VOA, we have calculated the total amount of vacant floorspace in Tonbridge town centre as almost 7,925 sq.m gross, with another 1,771 sq.m gross of vacant floorspace across the remaining district centres. This totals 9,696 sq.m of vacant floorspace across the borough's designated centres.

5.22 The single largest vacant town centre unit in the borough is the former Beales store adjacent to Sainsbury's in Tonbridge, which measures 4,343 sq.m (gross) and has remained vacant since the operator fell into administration in 2020. Sainsbury's retain the head lease for this unit and could in the future expand into this to provide a superstore offer with a wider non-food offer.

5.23 Given the relative performance and scale of the council's centres it may be reasonable to assume the shop unit vacancy rate could reduce to around 5% in centres with higher vacancy rates (being Tonbridge, Kings Hill and Snodland). If achieved, this reduction in the shop unit vacancy rate indicates that existing facilities could theoretically accommodate 5,050 sq.m of new uses from the capacity available over the plan period, which is only a quarter of the projected combined retail and food/beverage floorspace under-supply up to 2037 (21,330 sq.m gross).

5.24 Taken collectively, along with the identified extension at South Aylesford Retail Park, this existing and committed floorspace accounts for half of the retail and food/beverage capacity identified in Tonbridge and Malling to 2037. The capacity projections in this update suggest there is a need to allocate sites for retail and leisure development to accommodate projected growth up to 2042.

5.25 The priority in the short term will be the reoccupation of vacant shop units, including for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. The floorspace projections suggest there is a need to retain the existing stock of shop premises within designated centres to accommodate future growth. The need for Article 4 Directions to remove permitted development rights could be considered in areas with limited vacancy rates and where there is pressure for alternative uses that could undermine the vitality and viability of the town centre.

Tonbridge town centre opportunities

5.26 In addition to public realm improvements, urban design principles, and an associated transport strategy, the Tonbridge Central Area Action Plan (2008) identified various development allocations through Policy TCA11, which are analysed below in terms of any remaining retail potential.

Table 5.4 Tonbridge Central Area Action Plan sites

Site	Uses	Current Status
a) Botany (Sainsbury's, The Angel Centre and associated car parking) / East of High Street	2014: supermarket, cinema, fitness centre, restaurants and up to 120 residential units. 2024: Phase 2 Viability Report recommendations include residential (250 units), ground floor retail, hotel, replacement of The Angel Leisure Centre (including a health hub and GP surgery).	Sainsbury's pulled out of a joint venture with the council in 2014 to redevelop the existing premises. In 2024 Mace and Periscope were selected to bring forward the Tonbridge Town Centre East of High Street masterplan. This excludes the Sainsbury's premises but may include an element of new retail development. Ahead of masterplan publication, the council approved the relocation and redevelopment of The Angel Centre on the Sovereign Way Mid Car Park in April 2025.
b) Tonbridge Station Complex	Up to 400 residential units (town houses and flats) with ground floor retail.	Unrelated public realm and access works have been delivered to the station forecourt. Level of residential no longer considered to be achievable. Potential for small scale additional retail on Vale Road frontage.
c) River Walk West	Retail, restaurant, or pub/ bar uses at ground floor with residential (6 units)	Developed as sheltered apartments (31 units). No retail potential.
d) 1-2 River Walk	Retail or office use at ground floor with residential (6 units)	Developed as residential (36 units). No retail potential.
e) Bradford Street south	Retail uses at ground floor with residential (10 units)	This is existing public car parking which the council currently wishes to retain. No retail potential.
f) River Lawn	Replacement youth club facility (off-site), retail or commercial uses at ground floor with residential (30 units)	Developed as: • medical centre (inc. pharmacy), and • gym and residential (23 units). No retail potential.
g) Avebury Avenue	Residential (12 units)	This site continues to trade as vehicle sales and servicing. No retail potential.

Site	Uses	Current Status
h) Tonbridge Library	Replacement library (within Tonbridge), retail or commercial uses at ground floor with residential (30 units)	This is a complex site with multiple uses and ownerships. Library refurbished in 2018, KCC has no current intention to vacate this site. No obvious retail potential.
i) Quarry Hill Road/Waterloo Road	Retail and office use at ground floor with car parking, and residential (100 units) or hotel	Prior approval for conversion of upper floors to residential (20 units). Lidl and other retail on ground floor, no further potential.
j) Sovereign House	Retail and office use, or residential (80 units)	Developed as residential (196 units) with ground floor retail retained on High Street frontage. No further retail potential.
k) Waitrose/Iceland car park	Retention of car parking and residential (40 units)	This includes existing public car parking which the council currently wishes to retain. No further retail potential.
l) Tannery Trading Estate	Residential (100 units) with commercial office use	This is an existing and well occupied industrial estate comprising B2 units and should be retained. No retail potential.
m) Lyons Crescent	Residential (8 units)	Developed as residential (14 units). No retail potential.
n) Sovereign Way North	Replacement parking, with residential (50 units, inc. family housing)	Current long stay car park. This site forms part of the east of High Street masterplan and is being considered for residential redevelopment. No retail potential.
o) Munday Works West	Residential (50 units, inc. family housing)	Existing B2 units which continue to trade and should be retained. No retail potential.
p) Avenue de Puy East	Commercial office, further education or non-retail town centre uses	This is an existing mixed-use allocation comprising multiple sites, including B2 premises, public car parking and an indoor bowls club. No retail potential.
q) Strawberry Vale	Residential (20 units, inc. family housing)	Existing B2 units which continue to trade and should be retained. No retail potential.
r) Gas Works	Residential (80 units, inc. family housing)	Planning permission for residential (144 units), with flexible ground floor commercial space. Not yet constructed.

Site	Uses	Current Status
s) Cannon Lane	Leisure, hotel, and office uses with residential (100 units, inc. family housing)	Developed as residential (132 units), with part ground floor retail on Cannon Lane frontage. No further retail potential.
t) Riverdale Estate	Commercial office use	Existing B2 units which continue to trade and should be retained. No retail potential.
u) Junction of Vale Rise and Cannon Lane	Commercial office, hotel, or business use	Existing B2 units which continue to trade and should be retained. No retail potential.
v) Priory Rd / Goldsmith Rd (junction west)	Residential (30 units)	Partially developed as residential (14 units). No retail potential
w) Priory Rd / Goldsmith Rd (junction east)	Residential (30 units)	Existing B2 units which continue to trade and likely to be retained. No retail potential.

5.27 Sites a (Botany/East of High Street) and b (Tonbridge Station Complex) present the most likely locations for sizable new retail and food/beverage provision (>500 sq.m) within Tonbridge town centre. Few other sites identified above have retail potential.

5.28 It is acknowledged that site allocations will be updated in the new Local Plan, this will be informed by the assessment of all suitable opportunities through the council's Land Availability Assessment process. The Tonbridge TCAAP will not be retained once the new Local Plan is adopted.

Hierarchy of centres

5.29 The hierarchy of centres should be identified in the emerging Local Plan to ensure the vitality and viability of town and local centres is maintained and enhanced. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

5.30 Tonbridge is the largest and dominant centre in the borough, consistent with its designation as a town centre. The other designated district centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centres from smaller local centres and neighbourhood parades.

5.31 The network of main town and district centres identified in the retail hierarchy set out within the council's existing Local Plan (Core Strategy policy SP22 and Development Land Allocations DPD Policy R1) remains appropriate to maintain as existing.

5.32 Local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns whilst Neighbourhood Parades of *purely neighbourhood significance* are to be excluded from designation within the retail hierarchy.

Town centre boundaries and shopping frontage policy

5.33 The NPPF (Para. 90) indicates that development plans should define detailed boundaries for town centres. Designated town, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

5.34 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.

5.35 Future Local Plan policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries and PSA. In the district and local centres, the PSA and town centre boundary may cover the same area, and it may be unnecessary to designate two separate boundaries. Where the council has previously opted to identify specific retail frontages, the PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages.

5.36 The review of existing centre boundaries should be considered on a centre-by-centre basis. The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, that are worthy of future protection. The contraction of centre boundaries could be considered where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

5.37 However, despite wider national trends around the reduction of retail floorspace, longer term floorspace capacity projections and the relatively low proportion of vacant shop units suggest any significant contractions of Tonbridge and Malling's centres would not be appropriate at this stage.

Impacts and sequential tests

5.38 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for Tonbridge and Malling because this scale of development would exceed the respective retail projections for the borough to 2036.

5.39 Guidance for setting local thresholds is provided in the PPG, and as such we have considered the overall scale, vitality and viability of the centres, recent developments and opportunity sites, and market patterns.

5.40 Where Experian Goad floorspace data is available across an entire centre (Tonbridge town centre), we have calculated that the average floorspace of a vacant unit is 300 sq.m. This falls to 250 sq.m for just retailers and 210 sq.m for all properties across the wider Tonbridge town centre. Notwithstanding the relatively low vacancy rates across the centres, we note the relatively high levels of comparison goods leakage to out of centre facilities and destinations beyond Tonbridge and Malling in particular, and the potential for this to cumulatively impact the vitality and viability of the borough's centres. We therefore consider that competing edge and out of centre retail developments have the potential to impact the centres and suggest adopting a proportionate locally set threshold.

5.41 The council should consider reducing the impact threshold to 400 sq.m gross, consistent with the Sunday trading threshold to reflect that nature of stores likely to divert trade and impact centres. This threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of town, district and local retail centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. Policy should indicate that impact assessments should be proportionate to the scale of development proposed. The use of planning conditions to restrict the mix of Class E uses within new development will need to be considered on a case-by-case basis.

5.42 All main town centre uses located outside or on the edge of designated town, district and local retail centres should be required to consider the sequential test. The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

Controlling the mix of uses

5.43 The ability to control the mix of uses within centres and frontages has changed significantly since the previous development plans were adopted. Current and future market trends; the population driven retail floorspace capacity projections (taking account of commitments and vacancies); and changes to the NPPF and the UCO; indicate a more flexible approach to retail policies and the mix of uses within centres should be considered.

5.44 A balanced approach is recommended that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, the floorspace projections suggest there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town, district and local retail centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

5.45 Considering changes to the UCO and PDR, overly restrictive policies (that seek to limit unwanted uses to a certain number or proportion of units within identified frontages) may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach, but the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). Article 4 directions cannot prevent movement within the same use class i.e., new Class E. Article 4 directions to restrict PDR may be most appropriate in centres with a low vacancy rate and high combined retail and food/beverage floorspace projections i.e. where there is an imbalance between supply and demand.

5.46 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required in the same way planning conditions / legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.

5.47 As referenced above, the council should consider if they wish to continue to distinguish between the PSA and the wider town centre in Tonbridge town centre in the context of the trends and changes outlined in Section 2; the centre health checks in Appendix 2 and the updated floorspace capacity projections. In line with prevailing trends, the latest Experian Goad land use information for Tonbridge town centre indicates that the proportion of non-retail units has increased from 42% in 2003 to 47% in 2025.

5.48 There are three broad policy approaches that could be considered for future policy, as follows:

1. setting PSA boundaries and restrictive policies specifically to control the mix of uses;
2. relaxing policies to allow a more flexible approach to enable more non-town centre uses. This would usually involve removing defined frontages and shopping blocks, reducing the size of the PSA, and/or introducing more flexibility in policy wording; or
3. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.

5.49 Considering current and likely future market trends, the floorspace capacity projections, and changes to the UCO and permitted development rights described earlier, Option 1 is likely unsound and an unimplementable approach. Furthermore, this approach could be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the comparison and convenience goods floorspace projections are lower than previous projections (particularly when taking account of committed and vacant floorspace). As a result of these recent changes and the current land use mix in most centres, Options 2 or 3 would appear to be the most appropriate approaches.

5.50 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within a PSA. This could include some other main town centre uses not previously specified as being permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (acoustic/odour), impact on the nature and character of the retail frontages. Where necessary, all other non-Class E uses at ground floor level could be controlled within the designated PSA, but this could be undermined by PDR changes outside of conservation areas.

5.51 If option 2 is adopted then the policy could apply to the PSA only, still allowing significant flexibility in the rest of the centre. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways). This approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

Review of Town Centre Policy and Delivery Approaches

5.52 This section considers potential town centre policy and strategy options having regard to examples of town centre management practices from across the South East.

Town Centre Management

5.53 Tonbridge's Town Team is volunteer-led (including support from Tonbridge and Malling Borough Council officers) and maintains an active source of town centre events and activities both online and through the free 'What's On in Tonbridge' publication that has a key role in supporting the vitality and viability of the centre.

5.54 Royal Tunbridge Wells Together is the Business Improvement District (BID) for the nearby centre of Royal Tunbridge Wells and demonstrates the respective advantages of the commitment, staff resourcing, and other funding available through the formal designation of a town centre management group as a BID.

5.55 In addition to publishing guides, illustrated town centre maps and magazines advertising local events, the BID maintains active social media accounts and undertakes town centre marketing campaigns (including radio, railway station and bus advertisements).

5.56 Royal Tunbridge Wells Together also proactively funds public realm projects and local activities, festivals, and markets including Christmas lighting, seasonal family trails through the town to attract footfall to the centre.

5.57 This increase in funding and resources provides greater stability for such an organisation to draw in a wider range of stakeholders and a greater mandate for investment, interventions, and other improvements as custodians of the town centre.

Town Centre Policies

5.58 Lichfields contributed to the Maidstone Local Plan Review evidence base, providing an Economic Development Needs Study and subsequent addendums that assessed the council's requirements for employment and main town centre uses.

5.59 Maidstone Borough Council's Local Plan Review was submitted for Examination in 2022 and was adopted 20th March 2024. The Inspector's Report endorsed the council's approach to planning for economic and retail uses, subject to the Main Modifications. On this basis, it provides some examples of potential policy approaches that may have applicability within Tonbridge and Malling.

5.60 In addition to identifying town centre opportunity areas and site allocations, the Local Plan Review's policy approach sets out standalone development management policies specifically in relation to:

a Proposals for main town centre uses within designated areas, to reflect the respective scale of the Local Authority's centres;

b Proposals for other uses that would support the vitality and viability of the centres, including relevant assessment criteria;

c Measures required to support accessibility and sustainable transport links for edge and out-of-centre developments;

d Requirements for active frontages;

e Locally set impact thresholds;

f Criteria for the assessment of the loss of Class E uses within the Primary Shopping Area to protect the vitality and viability of the centre;

g Criteria for the assessment of the loss of Class E uses to defined uses within the town centre to protect the vitality and viability of the centre;

h Criteria to restrict inappropriate uses across lower order centres;

i Criteria to restrict the loss of key facilities across lower order centres;

j Criteria for proposals for small scale retail developments outside of designated centres.

5.61 Beyond the development management considerations set out above, the Local Plan Review sets out a Vision for Maidstone town centre to 2050 within policy, so as to tie a future Maidstone Town Centre Strategy to the development plan.

5.62 Building on the long-term vision set out in the Local Plan Review, the strategy will provide a focus for corporate priorities across the council. This can bring together strategies for integrated transport, housing, arts and culture, and economic development. In addition to attracting external investment and funding, the strategy can provide basis for engaging with relevant stakeholders and guide infrastructure, development and regeneration proposals.

Use of Assets

5.63 Ashford Borough Council adopted a development partnership model alongside a consultant team to design and bring forward the development of Elwick Place on the site of the town's former Cattle Market. Designed as the 'anchor' of a new leisure quarter and gateway into the town centre, the development incorporated a hotel, events space, cinema, restaurants, cafes, and modern retail units. Elwick Place was presented as part of wider range of town centre interventions (the 'Town Centre Reset') including a focus on key opportunity areas for new development, public transport improvements and public realm works.

5.64 Whilst footfall metrics have shown an associated 20% increase in footfall in the centre since Elwick Place opened in 2018, the council has continued their active involvement in the location, taking over the management of the cinema after Picturehouse pulled out in 2024.

5.65 An alternative approach was taken by Folkstone & Hythe District Council, who instructed a consultant team to design and develop a comprehensive Place Plan for Folkstone town centre through a series of engagement events, resulting in six 'priority projects'. This engagement-led approach focussed on public realm and accessibility works, alongside improvements to the gateway to the town centre. Having generated public support through the development of the Place Plan, the council has since applied for central government funding for the highest priority projects.

Strategic Opportunities

5.66 Taking account of the assessment of growth opportunities and regional best practice, a number of potential options are set out below for the council to consider as part of developing a future strategy for the town centre. Whilst the options set out have been informed by the findings of this study, they are not intended to constitute a comprehensive strategy for Tonbridge town centre which need to be subject to further work by the council as part of the Local Plan process.

Short term

Stakeholder partnerships

5.67 The council may wish to consider a role for a dedicated Town Centre Manager to actively pursue operators and new investment, as well as to engage directly with local businesses. This role could facilitate an application for a Business Improvement District (BID) to provide greater funding, stability, and agency for town centre stakeholders.

Medium term

Town centre interventions

5.68 In addition to the consideration of town centre allocations as part of the Local Plan process, the council may wish to focus on complementary interventions on smaller sites to make best use of assets that already exist in the town centre. These could range from an extension of the council's investment in upgraded town centre paving in 2016, to a wider programme of public realm works (such as investments in street furniture, planting, parklets, and traffic calming measures).

Long term

Comprehensive town centre strategy

5.69 The council may wish to develop a longer-term strategy incorporating unrealised town centre allocations existing inefficiencies beyond the existing East of High Street masterplan area with a specific focus on town centre vitality and viability. If the council were to take the decision to plan to increase the efficiencies of industrial estates to the east of the town centre, land could be freed up for the development of an urban quarter.

5.70 In addition to potential development opportunities, the relocation of the Tonbridge Farmers Market from Sovereign Way Car Park on the outskirts of the town to a more suitable location within the town centre, would provide a greater opportunity for spin-off spending that is not currently incentivised due to a lack of clear links between the market's existing location and the high street.

5.71 Tonbridge town centre benefits from a collection of unique assets including close proximity to the River Medway and Tonbridge Castle, as well as Tonbridge Racecourse Sportsground and park. The council may wish to consider progressing a cultural strategy to capitalise on the opportunities, or to develop a cultural quarter as part of a town centre strategy.

5.72 Finally, footfall between the station and the high street is currently disrupted by the car-dominated roundabout intersection and would benefit from improvements to facilitate clearer pedestrian access.

6.0 Conclusions

6.1 This section draws together the analysis and strategic recommendations set out in previous sections.

Market trends

6.2 The trends affecting town centres are not new. Most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants.

6.3 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 national shop vacancy rate has increased to over 14% and a cautious approach to future development needs is required. Despite these trends, the shop vacancy rate in Tonbridge and Malling remains relatively low, below the UK average.

6.4 Shopping behaviour will continue to change, and town centres will need 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, leisure and cultural experience.

Meeting Tonbridge and Malling's needs

6.5 The NPPF states that local planning authorities should assess the needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.6 The total retail capacity projection to 2042 is 18,250 sq.m (gross), whilst the extant permission for the extension of South Aylesford Retail Park in Quarry Wood would take up between 3,950 sq.m and 4,900 sq.m. Based on a reasonable reduction in shop vacancy rates or the reoccupation of the former Beales unit in Tonbridge town centre, reoccupied space could accommodate half of the remaining projected need leaving a shortfall of 8,300 sq.m.

6.7 There is also likely to be a shift from comparison goods retail space to convenience goods retail, food/beverage and leisure/cultural uses, with vacant shop premises also converting to these uses to reflect occupier demand. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may still be required to accommodate some new uses in accordance with the council's strategic priorities.

6.8 The council should therefore seek to establish the preferred option spatial strategy for the emerging Local Plan before identifying the retail and mixed-use including retail allocations. Given the floorspace capacity identified is largely driven by population growth, it is expected that new local and neighbourhood centres could be required to support emerging strategic housing allocations.

6.9 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections after 2037.

6.10 Future planning policy within the emerging Local Plan should seek to ensure new mixed-use developments are flexible. Policy criteria relating to good design and the configuration of buildings should seek to ensure building floorplates can be readily merged and/or sub-divided, offering maximum flexibility to respond to changing operator requirements over the plan period.

6.11 The capacity projections in this update suggest there is a requirement to allocate sites for retail or leisure development to accommodate projected growth for the first 10 years of the plan period. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town and district centres to accommodate future investment and strategic growth opportunities.

6.12 All the residual need for development is unlikely to be accommodated within the existing town centre boundaries. However, the projected capacity for new floorspace relates to population growth rather than growth in expenditure from the existing population. Major housing developments, potentially including urban extensions and/or new settlements, are like to be required to meet the standard method housing figures. A significant element of the residual retail, food/beverage and leisure floorspace capacity is likely to be accommodated within these large residential developments in the form of new local centres or neighbourhood parades.

6.13 Residents in Tonbridge and Malling have reasonable access to a range of commercial leisure and entertainment facilities within the borough and in the surrounding areas. Facilities in Tunbridge Wells, Rochester, Maidstone and Central London are accessible. There may be potential to provide about 4,900 sq.m of leisure, entertainment and cultural floorspace up to 2042, which could include:

- two large or five medium sized health and fitness facilities (at least 357 new fitness stations);
- other new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
- small-scale tourist attractions/cultural facilities.

6.14 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Implications for future policy

Hierarchy of centres

6.15 The hierarchy of centres should be identified in the emerging Local Plan to ensure the vitality and viability of town and local centres is maintained and enhanced. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

6.16 Tonbridge is the largest and dominant centre in the borough, consistent with its designation as a town centre. The other designated district centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centres from smaller local centres and neighbourhood parades.

6.17 The relatively low floorspace capacity projections (accounting for extant permissions) and the relatively low vacancy rates in centres suggest there is no need to extend the centre boundaries to accommodate future growth.

6.18 The network of main and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Impact and sequential tests

6.19 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for Tonbridge and Malling because this scale of development would exceed the respective retail projections for the borough to 2036.

6.20 The council should consider reducing the impact threshold to 400 sq.m gross, consistent with the Sunday trading threshold to reflect that nature of stores likely to divert trade and impact centres. This threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of town, district and local retail centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. Policy should indicate that impact assessments should be proportionate to the scale of development proposed. The use of planning conditions to restrict the mix of Class E uses within new development will need to be considered on a case-by-case basis.

6.21 The continued identification of town centre boundaries is important when applying the sequential approach. Local Plan policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries and primary shopping areas (PSA). A single combined PSA and town centre boundary should suffice for sequential test purposes.

6.22 All main town centre uses located outside or on the edge of designated town, district and local retail centres should be required to consider the sequential test. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

Controlling the mix of uses

6.23 Existing policy seeks to concentrate and protect retail uses within the designated centres. The floorspace capacity projections suggest there is a need for a mix of town centre uses to maintain the vitality and viability of centres. Future policy should provide enough flexibility to allow improvements to non-retail uses in appropriate locations that does not impact on nearby residential uses. Restrictive shop frontage policies may be inappropriate and unimplementable due to changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR).

6.24 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within a PSA (or even defined primary shopping frontages). This could include some other main town centre uses not previously specified as being permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against criteria-based policies relating to breaks in active frontages, amenity issues (acoustic/odours), impact on the nature and character of the retail frontages.

6.25 Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways), subject to acceptable amenity impacts. However, this approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

Appendix 1 Methodology/study area zones

Capacity Assessment Methodology Stages

Lichfields undertakes a staged approach to the assessment of capacity for retail and food & beverage (F&B) floorspace, summarised below:

- **Step 1** - seeks to identify the amount of expenditure currently available to shopping and F&B facilities within the study area, based on population and average expenditure per capita information, and the results of household surveys;
- **Step 2** - estimates the appropriate "benchmark" or "equilibrium" turnover of existing retail facilities based on sales floorspace and average sales density information for existing floorspace;
- **Step 3** - compares the actual level of available expenditure (Step 1) with the benchmark turnover (Step 2) to establish if existing facilities are trading above or below the benchmark turnover or at equilibrium, i.e. the baseline assessment, to identify surplus or deficit expenditure;
- **Step 4** - projects available expenditure into the future, allowing for population change, growth in average expenditure per capita and forecast changes in shopping patterns i.e. the changes in the proportional flows of expenditure within the study area zones due to pipeline development proposals;
- **Step 5** - projects forward the benchmark turnover of existing and committed retail and F&B floorspace, allowing for growth in turnover efficiencies (sales densities) to ensure the vitality and viability of these retail facilities and to maintain an appropriate equilibrium in the future;
- **Step 6** - compares the projected level of available expenditure (Step 4) with the projected benchmark turnover (Step 5) to quantify the amount of surplus expenditure, over and above the benchmark turnover (or equilibrium), available to support new retail and commercial leisure development in the future; and
- **Step 7** - converts available surplus expenditure into potential new floorspace based on average sales densities for new floorspace, to provide an appropriate balance and mix of different types of retail floorspace to meet any identified qualitative deficiencies in existing provision.

Table 1 Study Area Zones and Wards

Zone	Wards
1 – Tonbridge Urban	E05009572 – Cage Green E05009573 – Castle E05009578 – Higham E05009580 – Judd E05009584 – Medway E05009587 – Trench E05009588 – Vauxhall
2 – Tonbridge Rural South	E05005133 – Capel E05005148 – Southborough North E05005149 – Speldhurst and Bidborough E05009961 – Leigh and Chiddingstone Causeway E05009963 – Penshurst, Fordcombe and Chiddingstone
3 – Tonbridge Rural North	E05009570 – Borough Green and Long Mill E05009575 – Downs and Mereworth E05009577 – Hadlow and East Peckham E05009579 – Hildenborough E05009589 – Wateringbury E05009591 – Wrotham, Ightham and Stansted
4 – Kings Hill / West Malling	E05009569 – Aylesford South E05009574 – Ditton E05009583 – Larkfield South E05009590 – West Malling and Leybourne E05012988 – East Malling E05012989 – Kings Hill
5 – Snodland / Aylesford	E05009568 – Aylesford North and Walderslade E05009571 – Burham and Wouldham E05009582 – Larkfield North E05009585 – Snodland East and Ham Hill E05009586 – Snodland West and Holborough Lakes

Key

Tonbridge and Malling Local Authority Boundary

Zone 1 - Tonbridge Urban

Zone 2 - Tonbridge Rural South

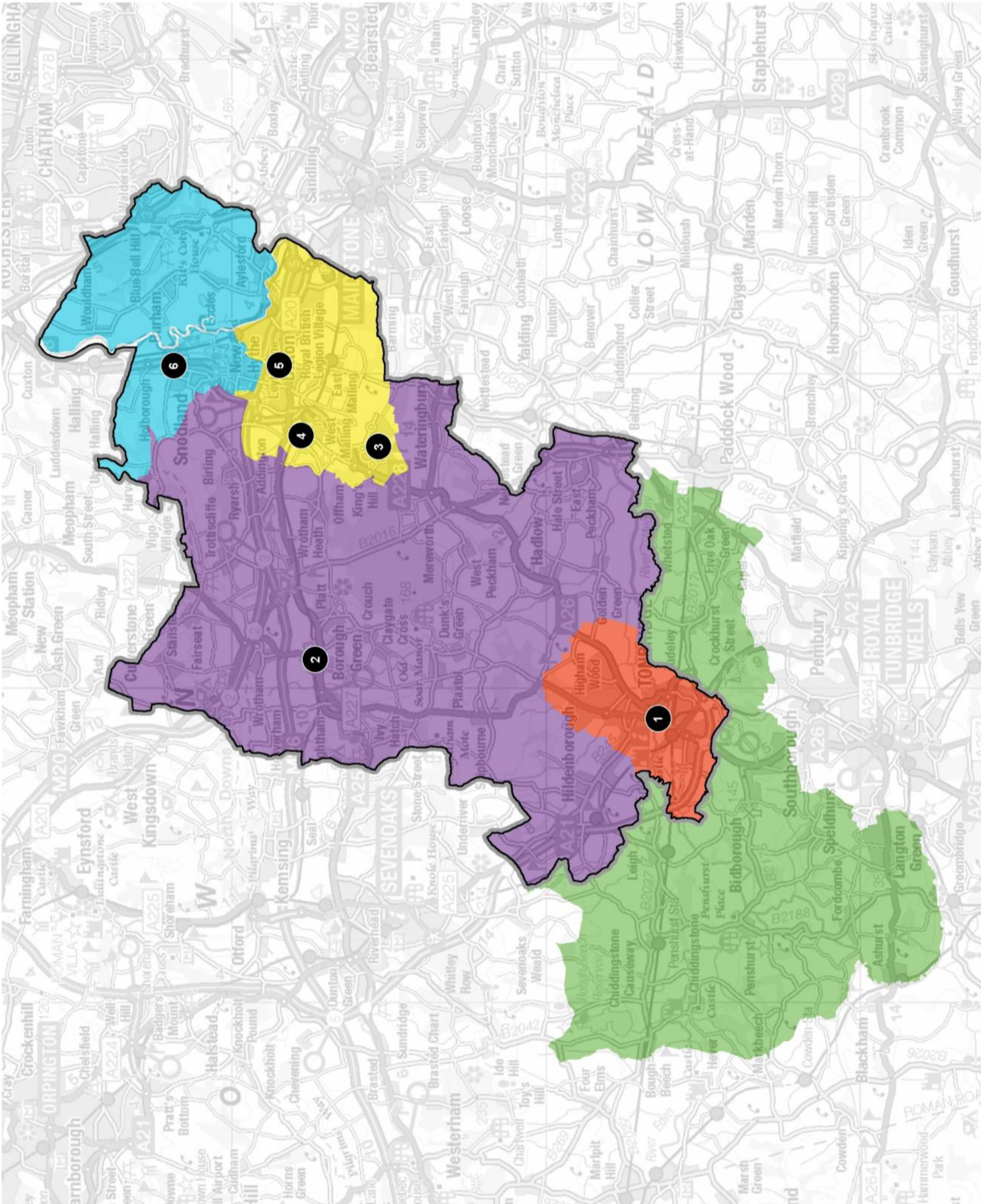
Zone 3 - Tonbridge Rural North

Zone 4 - Kings Hill / West Malling

Zone 5 - Snodland / Aylesford

Centre

1. Tonbridge Town Centre
2. Borough Green District Centre
3. Kings Hill District Centre
4. West Malling District Centre
5. Martin Square / Larkfield District Centre
6. Snodland District Centre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Appendix 2 Audit of Centres

Tonbridge Town Centre

Tonbridge is the principal town centre of the Borough, located at its south-west tip, and is designated a 'Town Centre' within the adopted Local Development Framework (2007). Tonbridge, together with Tunbridge Wells less than 5 miles to its south, is identified in the Core Strategy (September 2007) and the South East Plan (May 2009) as a Regional Hub. Tonbridge and Malling Borough is mostly rural in nature.

Tonbridge town centre has a relatively linear structure with the majority of its primary shopping area stretching approximately 800m north to south along the high street.

Mix of Uses

Tonbridge town centre has 172 retail and service units. It is the largest centre in Tonbridge and Malling in terms of the number of units. The mix of uses is set out in Table 1 which is compared with the Borough and UK averages. More detailed breakdowns of comparison goods, retail and non-retail services are shown in Tables 2 and 3.

The composition mix of uses in Tonbridge broadly reflects the Borough and UK averages, with several differences. The town centre has a higher proportion of convenience goods retail and a much lower concentration of pubs / bars that corresponds with the Borough average. Overall, the Borough has a relatively high provision of other non-retail services and a low vacancy rate, which is also seen in Tonbridge.

Table 1 Composition mix of shops and service units in Tonbridge Town Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	27	15.7	11.1	9.9
Comparison goods retail	44	25.6	22.3	28.2
Financial/Professional services	10	5.8	10.4	8.1
Restaurants/Cafés	24	14.0	12.4	11.2
Pubs/Bars	2	1.2	2.8	5.2
Hot food takeaways	9	5.2	7.6	6.4
Other non-retail services	35	20.3	23.8	16.1
Vacant	21	12.2	9.6	14.8
Total	172	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Tonbridge has 44 comparison goods retail shops, the highest in the borough. There is a reasonably good range and choice of shops with all 14 of the Goad Plan shop categories represented, as shown in Table 2. In particular, charity / second-hand shops make up a great proportion or about a fifth of comparison goods retail units in the centre. Overall, the borough's average for the proportion of charity / second-hand shops in its centres is double the UK average. There is less representation of some categories including cars / motorcycles / accessories and florists / nurserymen / seedsmen, although consistent with the national average.

Tonbridge has a few national multiple brands present in its town centre including Robert Dyas (home & DIY), Superdrug (pharmacy – health & beauty), Boots (pharmacy – health & beauty), Claire's (fashion accessories), and WHSmith (stationery).

Table 2 Composition mix of comparison goods retail units in Tonbridge Town Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	3	6.8	8.0	21.4
Furniture, carpets and textiles	3	6.8	9.1	7.3
Books, arts, cards and stationers	2	4.5	3.4	6.3
Electrical, music and photography	5	11.4	5.7	9.5
DIY, hardware and homeware	3	6.8	4.5	7.0
China, glass and gifts	2	4.5	6.8	5.8
Cars, motorcycles and accessories	1	2.3	3.4	1.3
Chemists, drugstores and opticians	6	13.6	18.2	12.1
Variety, department and catalogue	2	4.5	3.4	1.3
Florists, nurserymen and seedsmen	1	2.3	4.5	2.1
Toys, hobby, cycle and sports	1	2.3	3.4	5.4
Jewellers	2	4.5	5.7	5.4
Charity and second-hand shops	10	22.7	18.2	9.7
Other comparison goods retailers	3	6.8	5.7	5.6
Total	**44**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Tonbridge has 79 non-retail service units, as shown in Table 3, the highest provision in the borough. The food and beverage offer is higher for restaurants / cafés but lower for pubs / bars than the UK averages, while the proportion of hot food takeaways is broadly comparable to the national average. There is a disproportionately high provision of hairdressers / beauty parlours and no travel agents, as well as a limited provision of estate agents / valuers when compared to national averages.

Table 3 Composition mix of service use units in Tonbridge Town Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	24	35.3	26.2	26.1
Pubs/Bars	2	3.0	5.9	12.2
Fast food/takeaways	9	13.2	16.1	15.0
Banks/other financial services	4	5.9	4.3	6.7
Betting shops/casinos/ amusement centres	2	2.9	3.8	3.5
Estate agents/valuers	2	2.9	10.8	7.0
Travel agents	0	0.0	1.1	1.3
Hairdressers/beauty parlours	24	35.3	29.0	26.8
Launderettes/dry cleaners	2	2.9	3.2	1.4
Sub-total	**69**	**100.0**	**100.0**	**100.0**
Other	11			
Total	**80**			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Tonbridge town centre in the last year. Nearly 52% of respondents in the study area had visited Tonbridge, which was the highest figure in the borough. Of those who had used shops/services in Tonbridge, respondents were asked what they liked about the town centre and what improvements would make them visit more often. The main factor liked in Tonbridge was 24% mentioning that it was close to home. However, close to 14% said there was nothing they liked about Tonbridge.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: good cafés / restaurants (15%); attractive environment (15%); easy to find car parking space (9%); good layout / compact (7%); good range of supermarkets (7%); nice atmosphere / friendly people (6%); good range of independent shops (6%); good range of affordable shops (5%); and, good range of 'high street' retailers (5%).
- improvements mentioned: better / more clothing shops (19%); better / more non-food shops in general (18%); less empty shops (12%); better / more 'high street' chain retailers (11%); better / more independent shops (8%); less charity shops (7%); free car parking availability (5%); and, more car parking spaces (5%).

Tonbridge generally had higher levels of satisfaction than dissatisfaction.

Borough Green District Centre

Borough Green is one of the largest rural settlements in Tonbridge and Malling Borough and designated a 'District Centre' within the adopted Local Development Framework (2007). It is described in the Core Strategy (September 2007) as a Rural Service Centre and relatively remote from the main urban areas of the Borough. A small part of Borough Green is in an Area of Outstanding Beauty. The existing Local Plan identifies Borough Green to have brownfield opportunities, with land at Isles Quarry West – a derelict quarry site to its south – allocated as a strategic housing location in Development Land Allocations (April 2008) and released from the Green Belt to meet affordable housing needs.

Borough Green's retail centre is a small cluster spread across three intersecting roads spanning about 300m overall.

Mix of Uses

Borough Green district centre has 36 retail and service units, the fourth largest centre – tied with Martin Square/Larkfield – in terms of the number of units in Tonbridge and Malling borough. The mix of uses is set out in Table 4 which is compared with the borough and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Tables 5 and 6.

Borough Green's retail offer broadly reflects the Borough and UK averages, with a slightly higher proportion of convenience goods shops and a slightly lower proportion of comparison goods shops. The centre has a relatively low provision of financial/professional services and pubs/bars, but a particularly high provision of other non-retail services. The shop vacancy rate in Borough Green is the highest in the borough and above the borough's average but lower than the UK average and reflects the smaller scale of the centre.

Table 4 Composition mix of shops and service units in Borough Green District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	5	13.9	11.1	9.9
Comparison goods retail	7	19.4	22.3	28.2
Financial/Professional services	2	5.6	10.4	8.1
Restaurants/Cafés	4	11.1	12.4	11.2
Pubs/Bars	1	2.8	2.8	5.2
Hot food takeaways	3	8.3	7.6	6.4
Other non-retail services	9	25.0	23.8	16.1
Vacant	5	13.9	9.6	14.8
Total	**36**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Borough Green has only 7 comparison goods retail shops. The range and choice of comparison shops is rather limited with just 6 of the 14 Goad Plan shop categories represented, as shown in Table 5.

Table 5 Composition mix of comparison goods retail units in Borough Green District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	0	0.0%	8.0	21.4
Furniture, carpets and textiles	1	14.3%	9.1	7.3
Books, arts, cards and stationers	0	0.0%	3.4	6.3
Electrical, music and photography	0	0.0%	5.7	9.5

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
DIY, hardware and homeware	0	0.0	4.5	7.0
China, glass and gifts	0	0.0	6.8	5.8
Cars, motorcycles and accessories	1	14.3	3.4	1.3
Chemists, drugstores and opticians	2	28.6	18.2	12.1
Variety, department and catalogue	0	0.0	3.4	1.3
Florists, nurserymen and seedsmen	1	14.3	4.5	2.1
Toys, hobby, cycle and sports	0	0.0	3.4	5.4
Jewellers	0	0.0	5.7	5.4
Charity and second-hand shops	1	14.3	18.2	9.7
Other comparison goods retailers	1	14.3	5.7	5.6
Total	**7**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

The centre has 19 non-retail services as shown in Table 6. There is a good range and choice of restaurants / cafés, hairdressers / beauty parlours, and fast food / takeaways, but no provision of banks / other financial services.

Table 6 Composition mix of service use units in Borough Green District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	4	23.5	26.2	26.1
Pubs/Bars	1	5.9	5.9	12.2
Fast food/takeaways	3	17.6	16.1	15.0
Banks/other financial services	0	0.0	4.3	6.7
Betting shops/casinos/ amusement centres	1	5.9	3.8	3.5
Estate agents/valuers	1	5.9	10.8	7.0
Travel agents	1	5.9	1.1	1.3
Hairdressers/beauty parlours	5	29.4	29.0	26.8
Launderettes/dry cleaners	1	5.9	3.2	1.4
Sub-total	**17**	**100.0**	**100.0**	**100.0**
Other	2			
Total	**19**			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Borough Green district centre in the last year. Around 12% of respondents in the study area had visited Borough Green, which was the lowest figure across the centres in the borough (not counting respondents that did not visit any of the centres – under 10%). Of those who had used shops/services in Borough Green, respondents were asked what they liked about the district centre and what improvements would make them visit more often.

The main factor liked in Borough Green was 48% mentioning that it was close to home. Less than 3% said there was nothing they liked about Borough Green.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: good range of independent shops (19%); good cafés/restaurants (18%); availability of every need (10%); easy to find car parking space (9%); good range of other services (9%); good range of bakers/butchers/greengrocers (9%); good range of supermarkets (8%); and, good for health services (6%).
- improvements mentioned: more car parking spaces (19%); better range of financial services (8%); better/more non-food shops in general (5%); and, longer car parking times (5%).

Borough Green generally had high levels of satisfaction and low levels of dissatisfaction.

Kings Hill District Centre

Kings Hill is designated a district centre within the adopted development plan and near to the main urban area of the Medway Gap in the north-east of the borough. Kings Hill is described in the Core Strategy (September 2007) as a mixed-use community constructed on the former West Malling Airfield and in the emerging Reg 18 Draft Local Plan (September 2022) as a modern garden village settlement.

Kings Hill's retail centre has a tight nucleus, approximately 300m in diameter, in the centre of its settlement boundaries.

Mix of Uses

Kings Hill district centre has 22 retail and service units. It is the smallest centre in Tonbridge and Malling in terms of the number of units. The mix of uses is set out in Table 7 which is compared with the borough and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Tables 8 and 9.

Kings Hill has a rather low proportion of retail shops, of both convenience goods and comparison goods as compared to the borough and UK averages. The same can be said for other non-retail services in the centre. However, there is a high provision of restaurants/cafés and hot food takeaways, as well as financial/professional services. The vacancy rate is relatively low, below the UK average but above the borough average, and is the second highest in the Borough after Borough Green.

Table 7 Composition mix of shops and service units in Kings Hill District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	1	4.5	11.1	9.9
Comparison goods retail	4	18.2	22.3	28.2
Financial/Professional services	3	13.6	10.4	8.1
Restaurants/Cafés	4	18.2	12.4	11.2
Pubs/Bars	2	9.1	2.8	5.2
Hot food takeaways	2	9.1	7.6	6.4
Other non-retail services	3	13.6	23.8	16.1
Vacant	3	13.6	9.6	14.8
Total	**22**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Kings Hill has only 4 comparison goods retail shops, the lowest in the borough. Just 3 of the 14 Goad Plan shop categories are represented, as shown in Table 8. These categories are chemists / drugstores / opticians, china / glass / gifts, and charity / second-hand shops.

Table 8 Composition mix of comparison goods retail units in Kings Hill District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	0	0.0	8.0	21.4
Furniture, carpets and textiles	0	0.0	9.1	7.3
Books, arts, cards and stationers	0	0.0	3.4	6.3
Electrical, music and photography	0	0.0	5.7	9.5
DIY, hardware and homeware	0	0.0	4.5	7.0
China, glass and gifts	1	25.0	6.8	5.8

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Cars, motorcycles and accessories	0	0.0	3.4	1.3
Chemists, drugstores and opticians	2	50.0	18.2	12.1
Variety, department and catalogue	0	0.0	3.4	1.3
Florists, nurserymen and seedsmen	0	0.0	4.5	2.1
Toys, hobby, cycle and sports	0	0.0	3.4	5.4
Jewellers	0	0.0	5.7	5.4
Charity and second-hand shops	1	25.0	18.2	9.7
Other comparison goods retailers	0	0.0	5.7	5.6
Total	**4**	**100.0**		

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

The centre has 14 non-retail services, as shown in Table 9, the lowest provision in the borough. More than half of these facilities are food / beverage outlets and there is a limited range of other services.

Table 9 Composition mix of service use units in Kings Hill District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	4	33.3	26.2	26.1
Pubs/Bars	2	16.7	5.9	12.2
Fast food/takeaways	2	16.7	16.1	15.0
Banks/other financial services	1	8.3	4.3	6.7
Betting shops/casinos/ amusement centres	0	0.0	3.8	3.5
Estate agents/valuers	2	16.7	10.8	7.0
Travel agents	0	0.0	1.1	1.3
Hairdressers/beauty parlours	1	8.3	29.0	26.8
Launderettes/dry cleaners	0	0.0	3.2	1.4
Sub-total	**12**	**100.0**	**100.0**	**100.0**
Other	2			
Total	14			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Kings Hill district centre in the last year. Nearly 31% of respondents in the study area had visited Kings Hill, which was the third highest figure in the borough, close to the numbers at West Malling (32%) and after Tonbridge (52%). Of those who had used shops/services in Kings Hill, respondents were asked what they liked about the district centre and what improvements would make them visit more often. The main factor liked in Kings Hill was 37% mentioning that it was close to home. However, 14% said there was nothing they liked about Kings Hill.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: good range of supermarkets (34%); easy to find car parking space (12%); good cafés / restaurants (8%); familiarity / know where everything is (6%); good range of non-food shops in general (6%); and, availability of every need (5%).

- improvements mentioned: better / more cafés / restaurants (9%); and, better / more non-food shops in general (7%).

Kings Hill generally had high levels of satisfaction and low levels of dissatisfaction.

West Malling District Centre

West Malling is one of the largest rural settlements in Tonbridge and Malling borough and designated a district centre within the adopted development plan. It is identified in the Core Strategy (September 2007) as a Rural Service Centre but is situated rather close to the urban areas of the Medway Gap. West Malling's retail centre is relatively linear, just over 300m long, and lies mostly along its high street.

Mix of Uses

West Malling district centre has 86 retail and service units. It is the largest district centre in Tonbridge and Malling in terms of the number of units, or the second largest centre after Tonbridge town centre (172 units). The mix of uses is set out in Table 10 which is compared with the borough and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Tables 11 and 12.

West Malling's composition mix of uses generally seem to fall either significantly higher or significantly lower than the national averages. The centre has a disproportionately high concentration of financial / professional services, restaurants / cafés and other non-retail services, whilst having a markedly low concentration of convenience goods retail and hot food takeaways. West Malling also has a very low proportion of vacant shop units, the second lowest of the main centres in the borough.

Table 10 Composition mix of shops and service units in West Malling District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	3	3.5	11.1	9.9
Comparison goods retail	20	23.3	22.3	28.2
Financial/Professional services	14	16.3	10.4	8.1
Restaurants/Cafés	13	15.1	12.4	11.2
Pubs/Bars	5	5.8	2.8	5.2
Hot food takeaways	3	3.5	7.6	6.4
Other non-retail services	23	26.7	23.8	16.1
Vacant	5	5.8	9.6	14.8
Total	**86**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

West Malling has 20 comparison goods shops, the second highest in the borough after Tonbridge (44 shops). For the amount of shop units, there is a reasonable range and choice with 8 of the 14 Goad Plan shop categories covered, as shown in Table 11.

Choice within each category though is somewhat limited, i.e. one to four shops, with clothing / footwear, furniture / carpets / textiles and jewelers on the more numerous end of the scale. These three categories in West Malling, together with florists / nurserymen / seedsmen and china / glass / gifts, are also higher than the national averages.

Most comparison shops in the centre are small independent retailers with the exception of Boots (pharmacy – health & beauty).

Table 11 Composition mix of comparison goods retail units in West Malling District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	4	20.0	8.0	21.4
Furniture, carpets and textiles	4	20.0	9.1	7.3

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Books, arts, cards and stationers	1	5.0	3.4	6.3
Electrical, music and photography	0	0.0	5.7	9.5
DIY, hardware and homeware	0	0.0	4.5	7.0
China, glass and gifts	2	10.0	6.8	5.8
Cars, motorcycles and accessories	0	0.0	3.4	1.3
Chemists, drugstores and opticians	2	10.0	18.2	12.1
Variety, department and catalogue	0	0.0	3.4	1.3
Florists, nurserymen and seedsmen	2	10.0	4.5	2.1
Toys, hobby, cycle and sports	0	0.0	3.4	5.4
Jewellers	3	15.0	5.7	5.4
Charity and second-hand shops	2	10.0	18.2	9.7
Other comparison goods retailers	0	0.0	5.7	5.6
Total	**20**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

The centre has 58 non-retail services, as shown in Table 12, which is the second highest provision after Tonbridge (79 services). The food / beverage offer has a strong representation of restaurants/cafés and a low representation of fast food / takeaways, when compared to both borough and UK averages. There is also a comparatively high provision of hairdressers / beauty parlours, though this is in keeping with the borough's and UK's averages. The proportion of estate agents / valuers however, stands much higher than borough and UK averages. The relatively large number of other non-retail services include a post office, a funeral parlor, accountants, and solicitors' offices.

Table 12 Composition mix of service use units in West Malling District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	13	28.9	26.2	26.1
Pubs/Bars	5	11.1	5.9	12.2
Fast food/takeaways	3	6.7	16.1	15.0
Banks/other financial services	2	4.4	4.3	6.7
Betting shops/casinos/ amusement centres	1	2.2	3.8	3.5
Estate agents/valuers	7	15.6	10.8	7.0
Travel agents	0	0.0	1.1	1.3
Hairdressers/beauty parlours	12	26.7	29.0	26.8
Launderettes/dry cleaners	2	4.4	3.2	1.4
Sub-total	**45**	**100.0**	**100.0**	**100.0**
Other	13			
Total	**58**			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in West Malling district centre in the last year. Around 32% of respondents in the study area had visited West Malling, which was the second highest figure in the borough after Tonbridge (52%). Of those who had used shops / services in West Malling, respondents were asked what they liked about the district centre and what improvements would make them visit more often. The main factor liked in West Malling was 33% mentioning that there were good cafés / restaurants. Approximately 7% said there was nothing they liked about West Malling.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: attractive environment (21%); good range of independent shops (17%); good range of non-food shops in general (14%); close to home (12%); good pubs / bars (11%); good range of other services (11%); nice atmosphere / friendly people (7%); good range of supermarkets (6%); traditional / quaint (6%); and, availability of every need (5%).
- improvements mentioned: more car parking spaces (32%); free car parking availability (10%); better / more non-food shops in general (6%); and, better / more independent shops (6%).

West Malling generally had higher levels of satisfaction and low levels of dissatisfaction.

Martin Square / Larkfield District Centre

Martin Square/Larkfield is designated a district centre within the adopted development plan. The Core Strategy (September 2007) considers Larkfield to be in the major developed urban part of the Medway Gap resulting from an amalgamation of a series of former villages. Kent's county town of Maidstone is located nearby, 4 miles to the south-east.

Martin Square/Larkfield's retail centre is generally linear in shape spanning a distance of almost 500m.

Mix of Uses

Martin Square/Larkfield district centre has 36 retail and service units, the fourth largest centre, tied with Borough Green in terms of the number of units in Tonbridge and Malling. The mix of uses is set out in Table 13 which is compared with the borough and UK averages. More detailed breakdowns of comparison goods, retail and non-retail services are shown in Tables 14 and 15.

The composition mix of uses in Martin Square/Larkfield differ largely from the borough and especially the UK averages. Although the proportion of convenience goods retailers is in keeping with the averages, the proportion of comparison goods retailers is much lower. In terms of the food and beverage offer, hot food takeaways dominate whilst there is a very low proportion of restaurants/cafés and pubs / bars. Compared to the averages, Martin Square/Larkfield's provision of both financial/professional services and other non-retail services is significantly high. There are just two vacant shops in the centre, a lower proportion than the UK and borough averages.

Table 13 Composition mix of shops and service units in Martin Square/Larkfield District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	4	11.1	11.1	9.9
Comparison goods retail	5	13.9	22.3	28.2
Financial/Professional services	5	13.9	10.4	8.1
Restaurants/Cafés	2	5.6	12.4	11.2
Pubs/Bars	1	2.8	2.5	5.2
Hot food takeaways	7	19.4	7.6	6.4
Other non-retail services	10	27.8	23.8	16.1
Vacant	2	5.6	9.6	14.8
Total	36	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Martin Square/Larkfield has only 5 comparison goods retail shops, the second lowest in the borough after Kings Hill (4 shops). As such, the range and choice of comparison shops is very limited with just 4 of the 14 Goad Plan shop categories represented, as shown in Table 14. These categories are cars / motorcycles / accessories, chemists / drugstores / opticians, toys / hobby / cycle / sports and charity / second-hand shops.

Table 14 Composition mix of comparison goods retail units in Martin Square/Larkfield District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	0	0.0	8.0	21.4
Furniture, carpets and textiles	0	0.0	9.1	7.3
Books, arts, cards and stationers	0	0.0	3.4	6.3
Electrical, music and photography	0	0.0	5.7	9.5

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
DIY, hardware and homeware	0	0.0	4.5	7.0
China, glass and gifts	0	0.0	6.8	5.8
Cars, motorcycles and accessories	1	20.0	3.4	1.3
Chemists, drugstores and opticians	2	40.0	18.2	12.1
Variety, department and catalogue	0	0.0	3.4	1.3
Florists, nurserymen and seedsmen	0	0.0	4.5	2.1
Toys, hobby, cycle and sports	1	20.0	3.4	5.4
Jewellers	0	0.0	5.7	5.4
Charity and second-hand shops	1	20.0	18.2	9.7
Other comparison goods retailers	0	0.0	5.7	5.6
Total	**5**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

The centre has 24 non-retail services as shown in Table 15. As previously mentioned, the food and beverage offer is dominated by hot food takeaways rather than restaurant/cafés and pubs / bars, which is inconsistent with the national averages. There is a relatively high provision of estate agents / valuers.

Table 15 Composition mix of service use units in Martin Square/Larkfield District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	2	9.1	26.2	26.1
Pubs/Bars	1	4.5	5.9	12.2
Fast food/takeaways	7	31.8	16.2	15.0
Banks/other financial services	1	4.5	4.3	6.7
Betting shops/casinos/ amusement centres	1	4.5	3.8	3.5
Estate agents/valuers	4	18.2	10.8	7.0
Travel agents	1	4.5	1.1	1.3
Hairdressers/beauty parlours	4	18.2	29.2	26.8
Launderettes/dry cleaners	1	4.5	3.2	1.4
Sub-total	**22**	**100.0**	**100.0**	**100.0**
Other	2			
Total	**24**			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Martin Square/Larkfield district centre in the last year. Around 25% of respondents in the study area had visited Martin Square/Larkfield. Of those who had used shops/services in Martin Square/Larkfield, respondents were asked what they liked about the district centre and what improvements would make them visit more often. The main factor liked in Martin Square/Larkfield was 29% mentioning that it was close to home. 7% said there was nothing they liked about Martin Square/Larkfield.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: good range of other services (18%); good range of bakers / butchers / greengrocers (13%); easy to find car parking space (13%); good cafés / restaurants (9%); and, free car parking (7%).
- improvements mentioned: more car parking spaces (13%); nicer environment (6%); and, better / more independent shops (6%).

Martin Square/Larkfield generally had reasonably high levels of satisfaction and low levels of dissatisfaction.

Snodland District Centre

Snodland is designated a district centre within the adopted development plan and part of the main urban area of the Medway Gap in the north-east of the borough.

Snodland's retail centre covers the cross-intersection of its High Street and Holborough Road/Malling Road, spanning 200m north-south and 250m east-west. High Speed 1 services stop at Snodland train station which is less than 400m away from the retail centre.

Mix of Uses

Snodland district centre has 43 retail and service units. The mix of uses is set out in Table 16 which is compared with the borough and UK averages. More detailed breakdowns of comparison goods retail and non-retail services are shown in Tables 17 and 18.

Snodland's composition mix of uses mostly vary from the borough and UK averages. Whilst the proportion of convenience goods retail units in the centre is comparative with the national average, the proportion of comparison goods retail units falls much shorter to both averages. Hot food takeaways monopolize the food and beverage offer with only one restaurant / café and no pubs / bars. There is a high provision of financial / professional services and other non-retail services in Snodland, where both categories approximately double the national average. The shop vacancy rate remains on par with the Tonbridge and Malling average, which is fairly low compared to the UK average.

Table 16 Composition mix of shops and service units in Snodland District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Convenience goods retail	4	9.3	11.1	9.9
Comparison goods retail	8	18.6	22.3	28.2
Financial/Professional services	7	16.3	10.4	8.1
Restaurants/Cafés	1	2.3	12.4	11.2
Pubs/Bars	0	0.0	2.8	5.2
Hot food takeaways	6	14.0	7.6	6.4
Other non-retail services	14	32.6	23.8	16.1
Vacant	3	7.0	9.6	14.8
Total	**43**	**100.0**	**100.0**	**100.0**

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Snodland has only 8 comparison goods retail shops. The range and choice of comparison shops is rather limited with just 7 of the 14 Goad Plan shop categories represented, as shown in Table 17. Of note, there is no representation for clothing / footwear, typically the category that makes up the highest proportion in UK centres.

Table 17 Composition mix of comparison goods retail units in Snodland District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Clothing and footwear	0	0.0	8.0	21.4
Furniture, carpets and textiles	0	0.0	9.1	7.3
Books, arts, cards and stationers	0	0.0	3.4	6.3
Electrical, music and photography	0	0.0	5.7	9.5
DIY, hardware and homeware	1	12.5	4.5	7.0
China, glass and gifts	1	12.5	6.8	5.8

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Cars, motorcycles and accessories	0	0.0	3.4	1.3
Chemists, drugstores and opticians	2	25.0	18.2	12.1
Variety, department and catalogue	1	12.5	3.4	1.3
Florists, nurserymen and seedsmen	0	0.0	4.5	2.1
Toys, hobby, cycle and sports	1	12.5	3.4	5.4
Jewellers	0	0.0	5.7	5.4
Charity and second-hand shops	1	12.5	18.2	9.7
Other comparison goods retailers	1	12.5	5.7	5.6
Total	**8**	**100.0**	100.0	100.0

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey May 2025)

The centre has 28 non-retail services as shown in Table 18. As previously mentioned, the food and beverage offer is monopolized by hot food takeaways. There is also a high provision of hairdressers / beauty parlors and estate agents / valuers when compared to both the borough and UK averages. For the number of service units, Snodland's proportion of betting shops / casinos / amusement centres is the highest in the borough and much higher than the national average. The other non-retail service outlets include a tattoo studio, tailors' shop, funeral parlour, pet groomers and home care agency.

Table 18 Composition mix of service use units in Snodland District Centre

	Units (#)	Units (%)	Borough Avg. (%)	UK Avg. (%)
Restaurants/Cafés	1	4.8	26.2	26.1
Pubs/Bars	0	0.0	5.9	12.2
Fast food/takeaways	6	28.6	16.2	15.0
Banks/other financial services	0	0.0	4.3	6.7
Betting shops/casinos/ amusement centres	2	9.5	3.8	3.5
Estate agents/valuers	4	19.0	10.8	7.0
Travel agents	0	0.0	1.1	1.3
Hairdressers/beauty parlours	8	38.1	29.2	26.8
Launderettes/dry cleaners	0	0.0	3.2	1.4
Sub-total	**21**	**100.0**	**100.0**	**100.0**
Other	7			
Total	**28**			

Source: Experian Goad UK data (March 2025) and Tonbridge and Malling land use survey (May 2025)

Customer Views

As part of the household survey, respondents were asked if they had used shops and services in Snodland district centre in the last year. Just under 13% of respondents in the study area had visited Snodland, which was very close to the lowest figure across the centres at Borough Green (12%). Of those who had used shops/services in Snodland, respondents were asked what they liked about the district centre and what improvements would make them visit more often.

The main factor liked in Snodland was 38% mentioning that it was close to home. However, 27% said there was nothing they liked about Snodland.

The other main factors liked and improvements mentioned (5% of respondents or more) were:

- factors liked: availability of every need (22%); good range of other services (15%); good range of bakers / butchers / greengrocers (9%); and, good range of independent shops (6%).
- improvements mentioned: more car parking spaces (17%); better / more cafés / restaurants (12%); better / more pubs / bars (12%); less empty shops (11%); nicer environment (9%); and, less hairdressers / salons (5%).

Snodland generally had reasonable levels of satisfaction but higher levels of dissatisfaction.

Appendix 3 Convenience goods assessment

Table 1 - Study area population projections

Zone	2024	2027	2032	2037	2042
1	37,705	39,722	43,090	46,302	49,499
2	17,795	17,950	18,245	18,518	18,835
3	31,647	33,340	36,167	38,862	41,546
4	38,701	40,771	44,229	47,525	50,807
5	28,129	29,634	32,147	34,542	36,928
Total	**153,977**	**161,417**	**173,878**	**185,749**	**197,616**

Sources:

Standard method population projections

Experian population projections (March 2025) for Zone 2

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

Zone	2024	2027	2032	2037	2042
1	2,793	2,734	2,676	2,630	2,592
2	3,210	3,142	3,075	3,022	2,979
3	3,033	2,970	2,906	2,856	2,815
4	2,801	2,742	2,684	2,638	2,600
5	2,767	2,709	2,651	2,605	2,568

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2024	2027	2032	2037	2042
1	105.31	108.61	115.32	121.76	128.32
2	57.11	56.40	56.11	55.96	56.11
3	96.00	99.00	105.12	110.99	116.97
4	108.41	111.81	118.72	125.35	132.10
5	77.83	80.27	85.22	89.99	94.83
Total	**444.66**	**456.08**	**480.48**	**504.05**	**528.34**

Sources:

Tables 1 and 2

Table 4 - Base year 2024 convenience goods market share by zone (%)

Zone / Destination	1	2	3	4	5	Total
Zone 1 - Tonbridge	60.5%	22.6%	31.1%	1.4%	0.2%	24.3%
Zone 1 - Martin Hardie Way	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Zone 1 - York Parade	4.7%	0.0%	0.3%	0.0%	0.0%	1.2%
Zone 1 - Other, Cannon Lane	1.3%	3.6%	3.4%	0.0%	0.3%	1.5%
Zone 1 - Other	4.9%	0.0%	2.2%	0.0%	0.0%	1.6%
Zone 2 - Other	0.0%	14.0%	0.0%	0.0%	0.0%	1.8%
Zone 3 - Borough Green	0.6%	0.0%	9.8%	0.0%	0.0%	2.3%
Zone 3 - East Peckham	0.0%	0.0%	2.9%	0.3%	0.0%	0.7%
Zone 3 - Hadlow	0.0%	0.0%	0.6%	0.0%	0.0%	0.1%
Zone 3 - Hildenborough	0.0%	1.1%	3.6%	0.0%	0.0%	0.9%
Zone 3 - Other	0.0%	0.0%	2.0%	0.0%	0.0%	0.4%
Zone 4 - Kings Hill	1.9%	0.5%	5.3%	35.6%	11.2%	12.3%
Zone 4 - Martin Square Larkfield	0.0%	0.0%	2.3%	18.6%	8.0%	6.4%
Zone 4 - West Malling	0.6%	0.0%	0.7%	5.1%	0.9%	1.7%
Zone 4 - Twisden Road, East Malling	0.0%	0.0%	0.0%	2.0%	0.0%	0.5%
Zone 4 - Premier Parade, Aylesford	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%
Zone 4 - Woodlands Parade, Ditton	0.0%	0.0%	0.0%	1.4%	0.0%	0.3%
Zone 4 - Little Market Row, Leybourne	0.0%	0.0%	0.2%	1.1%	1.1%	0.5%
Zone 4 - Other, Quarry Wood	0.0%	0.0%	4.0%	13.4%	20.7%	7.8%
Zone 4 - Other	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%
Zone 5 - Snodland	0.0%	0.0%	0.0%	0.8%	12.1%	2.3%
Zone 5 - Other	0.0%	0.0%	3.4%	11.3%	26.1%	8.0%
Tonbridge & Malling sub-total	**74.4%**	**41.9%**	**72.1%**	**91.5%**	**80.8%**	**75.0%**
Tunbridge Wells	21.5%	38.9%	7.0%	4.3%	0.0%	12.7%
Sevenoaks	3.6%	1.6%	15.2%	0.2%	0.0%	4.4%
Chatham	0.0%	0.0%	0.0%	0.0%	10.0%	1.7%
Maidstone	0.0%	0.0%	0.6%	1.9%	3.5%	1.2%
Paddock Wood	0.0%	0.6%	2.5%	0.7%	0.0%	0.8%
Crowborough	0.2%	3.5%	0.6%	0.0%	0.0%	0.6%
Edenbridge	0.0%	4.8%	0.0%	0.0%	0.0%	0.6%
Gillingham	0.0%	0.0%	0.0%	0.0%	3.7%	0.6%
Rusthall	0.0%	4.0%	0.0%	0.0%	0.0%	0.5%
Gravesend	0.0%	0.0%	1.8%	0.0%	0.0%	0.4%
Rochester	0.0%	0.0%	0.0%	0.0%	1.5%	0.3%
Groombridge	0.0%	1.7%	0.0%	0.0%	0.0%	0.2%
Other	0.2%	3.0%	0.2%	1.4%	0.6%	0.9%
Other sub-total	**25.6%**	**58.1%**	**27.9%**	**8.5%**	**19.2%**	**25.0%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Sources:

NEMS Household Survey (June 2023) and Lichfields' analysis.

Table 5 - Base year 2024 convenience goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2024	**105.31**	**57.11**	**96.00**	**108.41**	**77.83**	**444.66**
Zone 1 - Tonbridge	63.75	12.89	29.89	1.49	0.15	108.18
Zone 1 - Martin Hardie Way	-	-	0.20	-	-	0.20
Zone 1 - York Parade	4.96	-	0.33	-	-	5.29
Zone 1 - Other, Cannon Lane	1.35	2.04	3.24	-	0.25	6.87
Zone 1 - Other	5.19	-	2.09	-	-	7.28
Zone 2 - Other	-	8.02	-	-	-	8.02
Zone 3 - Borough Green	0.59	-	9.43	-	-	10.01
Zone 3 - East Peckham	-	-	2.82	0.32	-	3.14
Zone 3 - Hadlow	-	-	0.60	-	-	0.60
Zone 3 - Hildenborough	-	0.65	3.45	-	-	4.10
Zone 3 - Other	-	-	1.96	-	-	1.96
Zone 4 - Kings Hill	1.96	0.31	5.08	38.56	8.74	54.64
Zone 4 - Martin Square Larkfield	-	-	2.23	20.17	6.26	28.66
Zone 4 - West Malling	0.59	-	0.67	5.48	0.73	7.46
Zone 4 - Twisden Road, East Malling	-	-	-	2.18	-	2.18
Zone 4 - Premier Parade, Aylesford	-	-	-	0.32	-	0.32
Zone 4 - Woodlands Parade, Ditton	-	-	-	1.52	-	1.52
Zone 4 - Little Market Row, Leybourne	-	-	0.20	1.17	0.89	2.27
Zone 4 - Other, Quarry Wood	-	-	3.83	14.53	16.14	34.51
Zone 4 - Other	-	-	-	0.38	-	0.38
Zone 5 - Snodland	-	-	-	0.88	9.38	10.26
Zone 5 - Other	-	-	3.23	12.23	20.33	35.79
Tonbridge & Malling sub-total	**78.38**	**23.91**	**69.26**	**99.23**	**62.88**	**333.65**
Tunbridge Wells	22.66	22.22	6.67	4.71	-	56.27
Sevenoaks	3.81	0.91	14.60	0.19	-	19.51
Chatham	-	-	-	-	7.77	7.77
Maidstone	-	-	0.53	2.04	2.70	5.27
Paddock Wood	-	0.36	2.41	0.73	-	3.50
Crowborough	0.26	1.99	0.58	-	-	2.83
Edenbridge	-	2.75	-	-	-	2.75
Gillingham	-	-	-	-	2.86	2.86
Rusthall	-	2.28	-	-	-	2.28
Gravesend	-	-	1.75	-	-	1.75
Rochester	-	-	-	-	1.18	1.18
Groombridge	-	0.96	-	-	-	0.96
Other	0.20	1.73	0.20	1.51	0.43	4.08
Other sub-total	**26.93**	**33.21**	**26.74**	**9.19**	**14.95**	**111.02**
Total	**105.31**	**57.11**	**96.00**	**108.41**	**77.83**	**444.66**

Sources:

Tables 3 and 4

Table 6 - Future 2027 convenience goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2027	**108.61**	**56.40**	**99.00**	**111.81**	**80.27**	**456.08**
Zone 1 - Tonbridge	65.75	12.73	30.83	1.54	0.15	111.00
Zone 1 - Martin Hardie Way	-	-	0.21	-	-	0.21
Zone 1 - York Parade	5.11	-	0.34	-	-	5.46
Zone 1 - Other, Cannon Lane	1.39	2.01	3.34	-	0.26	7.00
Zone 1 - Other	5.35	-	2.16	-	-	7.51
Zone 2 - Other	-	7.92	-	-	-	7.92
Zone 3 - Borough Green	0.60	-	9.72	-	-	10.33
Zone 3 - East Peckham	-	-	2.91	0.33	-	3.24
Zone 3 - Hadlow	-	-	0.62	-	-	0.62
Zone 3 - Hildenborough	-	0.64	3.56	-	-	4.20
Zone 3 - Other	-	-	2.02	-	-	2.02
Zone 4 - Kings Hill	2.02	0.31	5.24	39.76	9.01	56.34
Zone 4 - Martin Square Larkfield	-	-	2.30	20.80	6.46	29.56
Zone 4 - West Malling	0.60	-	0.69	5.65	0.76	7.70
Zone 4 - Twisden Road, East Malling	-	-	-	2.25	-	2.25
Zone 4 - Premier Parade, Aylesford	-	-	-	0.33	-	0.33
Zone 4 - Woodlands Parade, Ditton	-	-	-	1.56	-	1.56
Zone 4 - Little Market Row, Leybourne	-	-	0.21	1.21	0.92	2.34
Zone 4 - Other, Quarry Wood	-	-	3.95	14.99	16.65	35.59
Zone 4 - Other	-	-	-	0.40	-	0.40
Zone 5 - Snodland	-	-	-	0.90	9.68	10.58
Zone 5 - Other	-	-	3.34	12.61	20.97	36.91
Tonbridge & Malling sub-total	**80.83**	**23.61**	**71.43**	**102.33**	**64.85**	**343.05**
Tunbridge Wells	23.37	21.94	6.88	4.86	-	57.06
Sevenoaks	3.93	0.90	15.05	0.20	-	20.08
Chatham	-	-	-	-	8.02	8.02
Maidstone	-	-	0.54	2.10	2.79	5.44
Paddock Wood	-	0.36	2.48	0.75	-	3.60
Crowborough	0.27	1.96	0.60	-	-	2.83
Edenbridge	-	2.71	-	-	-	2.71
Gillingham	-	-	-	-	2.95	2.95
Rusthall	-	2.25	-	-	-	2.25
Gravesend	-	-	1.80	-	-	1.80
Rochester	-	-	-	-	1.22	1.22
Groombridge	-	0.95	-	-	-	0.95
Other	0.21	1.71	0.21	1.56	0.45	4.13
Other sub-total	**27.78**	**32.79**	**27.58**	**9.48**	**15.42**	**113.04**
Total	**108.61**	**56.40**	**99.00**	**111.81**	**80.27**	**456.08**

Sources:

Tables 3 and 4

Table 7 - Future 2032 convenience goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2032	**115.32**	**56.11**	**105.12**	**118.72**	**85.22**	**480.48**
Zone 1 - Tonbridge	69.81	12.67	32.73	1.63	0.16	117.01
Zone 1 - Martin Hardie Way	-	-	0.22	-	-	0.22
Zone 1 - York Parade	5.43	-	0.37	-	-	5.79
Zone 1 - Other, Cannon Lane	1.48	2.00	3.55	-	0.27	7.30
Zone 1 - Other	5.68	-	2.29	-	-	7.97
Zone 2 - Other	-	7.88	-	-	-	7.88
Zone 3 - Borough Green	0.64	-	10.32	-	-	10.96
Zone 3 - East Peckham	-	-	3.09	0.35	-	3.44
Zone 3 - Hadlow	-	-	0.66	-	-	0.66
Zone 3 - Hildenborough	-	0.63	3.78	-	-	4.41
Zone 3 - Other	-	-	2.14	-	-	2.14
Zone 4 - Kings Hill	2.14	0.31	5.56	42.22	9.57	59.80
Zone 4 - Martin Square Larkfield	-	-	2.44	22.09	6.85	31.38
Zone 4 - West Malling	0.64	-	0.73	6.00	0.80	8.17
Zone 4 - Twisden Road, East Malling	-	-	-	2.39	-	2.39
Zone 4 - Premier Parade, Aylesford	-	-	-	0.35	-	0.35
Zone 4 - Woodlands Parade, Ditton	-	-	-	1.66	-	1.66
Zone 4 - Little Market Row, Leybourne	-	-	0.22	1.29	0.98	2.48
Zone 4 - Other, Quarry Wood	-	-	4.20	15.92	17.68	37.79
Zone 4 - Other	-	-	-	0.42	-	0.42
Zone 5 - Snodland	-	-	-	0.96	10.27	11.23
Zone 5 - Other	-	-	3.54	13.39	22.26	39.19
Tonbridge & Malling sub-total	**85.82**	**23.49**	**75.84**	**108.65**	**68.85**	**362.66**
Tunbridge Wells	24.82	21.83	7.31	5.16	-	59.12
Sevenoaks	4.17	0.90	15.98	0.21	-	21.26
Chatham	-	-	-	-	8.51	8.51
Maidstone	-	-	0.58	2.23	2.96	5.77
Paddock Wood	-	0.36	2.63	0.80	-	3.79
Crowborough	0.29	1.95	0.64	-	-	2.88
Edenbridge	-	2.70	-	-	-	2.70
Gillingham	-	-	-	-	3.13	3.13
Rusthall	-	2.24	-	-	-	2.24
Gravesend	-	-	1.92	-	-	1.92
Rochester	-	-	-	-	1.29	1.29
Groombridge	-	0.94	-	-	-	0.94
Other	0.22	1.70	0.22	1.66	0.48	4.27
Other sub-total	**29.49**	**32.62**	**29.28**	**10.06**	**16.37**	**117.82**
Total	**115.32**	**56.11**	**105.12**	**118.72**	**85.22**	**480.48**

Sources:

Tables 3 and 4

Table 8 - Future 2037 convenience goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2037	**121.76**	**55.96**	**110.99**	**125.35**	**89.99**	**504.05**
Zone 1 - Tonbridge	73.71	12.63	34.56	1.73	0.17	122.81
Zone 1 - Martin Hardie Way	-	-	0.23	-	-	0.23
Zone 1 - York Parade	5.73	-	0.39	-	-	6.12
Zone 1 - Other, Cannon Lane	1.56	1.99	3.75	-	0.29	7.59
Zone 1 - Other	6.00	-	2.42	-	-	8.42
Zone 2 - Other	-	7.86	-	-	-	7.86
Zone 3 - Borough Green	0.68	-	10.90	-	-	11.58
Zone 3 - East Peckham	-	-	3.27	0.37	-	3.64
Zone 3 - Hadlow	-	-	0.69	-	-	0.69
Zone 3 - Hildenborough	-	0.63	3.99	-	-	4.62
Zone 3 - Other	-	-	2.26	-	-	2.26
Zone 4 - Kings Hill	2.26	0.31	5.87	44.58	10.10	63.13
Zone 4 - Martin Square Larkfield	-	-	2.58	23.32	7.24	33.14
Zone 4 - West Malling	0.68	-	0.77	6.33	0.85	8.63
Zone 4 - Twisden Road, East Malling	-	-	-	2.52	-	2.52
Zone 4 - Premier Parade, Aylesford	-	-	-	0.37	-	0.37
Zone 4 - Woodlands Parade, Ditton	-	-	-	1.75	-	1.75
Zone 4 - Little Market Row, Leybourne	-	-	0.23	1.36	1.03	2.62
Zone 4 - Other, Quarry Wood	-	-	4.43	16.81	18.67	39.90
Zone 4 - Other	-	-	-	0.44	-	0.44
Zone 5 - Snodland	-	-	-	1.01	10.85	11.86
Zone 5 - Other	-	-	3.74	14.14	23.51	41.38
Tonbridge & Malling sub-total	**90.62**	**23.43**	**80.08**	**114.73**	**72.70**	**381.55**
Tunbridge Wells	26.20	21.77	7.72	5.45	-	61.14
Sevenoaks	4.40	0.89	16.88	0.22	-	22.40
Chatham	-	-	-	-	8.99	8.99
Maidstone	-	-	0.61	2.36	3.12	6.09
Paddock Wood	-	0.36	2.78	0.85	-	3.98
Crowborough	0.30	1.95	0.67	-	-	2.92
Edenbridge	-	2.69	-	-	-	2.69
Gillingham	-	-	-	-	3.31	3.31
Rusthall	-	2.23	-	-	-	2.23
Gravesend	-	-	2.02	-	-	2.02
Rochester	-	-	-	-	1.37	1.37
Groombridge	-	0.94	-	-	-	0.94
Other	0.23	1.70	0.23	1.75	0.50	4.41
Other sub-total	**31.14**	**32.53**	**30.91**	**10.62**	**17.29**	**122.50**
Total	**121.76**	**55.96**	**110.99**	**125.35**	**89.99**	**504.05**

Sources:

Tables 3 and 4

Table 9 - Future 2042 convenience goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2042	**128.32**	**56.11**	**116.97**	**132.10**	**94.83**	**528.34**
Zone 1 - Tonbridge	77.68	12.67	36.42	1.82	0.18	128.77
Zone 1 - Martin Hardie Way	-	-	0.24	-	-	0.24
Zone 1 - York Parade	6.04	-	0.41	-	-	6.45
Zone 1 - Other, Cannon Lane	1.64	2.00	3.95	-	0.30	7.89
Zone 1 - Other	6.32	-	2.55	-	-	8.87
Zone 2 - Other	-	7.88	-	-	-	7.88
Zone 3 - Borough Green	0.71	-	11.49	-	-	12.20
Zone 3 - East Peckham	-	-	3.44	0.39	-	3.83
Zone 3 - Hadlow	-	-	0.73	-	-	0.73
Zone 3 - Hildenborough	-	0.63	4.20	-	-	4.84
Zone 3 - Other	-	-	2.39	-	-	2.39
Zone 4 - Kings Hill	2.39	0.31	6.19	46.98	10.65	66.51
Zone 4 - Martin Square Larkfield	-	-	2.72	24.58	7.63	34.92
Zone 4 - West Malling	0.71	-	0.81	6.67	0.89	9.09
Zone 4 - Twisden Road, East Malling	-	-	-	2.66	-	2.66
Zone 4 - Premier Parade, Aylesford	-	-	-	0.39	-	0.39
Zone 4 - Woodlands Parade, Ditton	-	-	-	1.85	-	1.85
Zone 4 - Little Market Row, Leybourne	-	-	0.24	1.43	1.09	2.76
Zone 4 - Other, Quarry Wood	-	-	4.67	17.71	19.67	42.05
Zone 4 - Other	-	-	-	0.47	-	0.47
Zone 5 - Snodland	-	-	-	1.07	11.43	12.50
Zone 5 - Other	-	-	3.94	14.90	24.77	43.61
Tonbridge & Malling sub-total	**95.50**	**23.49**	**84.39**	**120.91**	**76.62**	**400.90**
Tunbridge Wells	27.61	21.83	8.13	5.74	-	63.32
Sevenoaks	4.64	0.90	17.79	0.23	-	23.56
Chatham	-	-	-	-	9.47	9.47
Maidstone	-	-	0.64	2.49	3.29	6.42
Paddock Wood	-	0.36	2.93	0.89	-	4.18
Crowborough	0.32	1.95	0.71	-	-	2.98
Edenbridge	-	2.70	-	-	-	2.70
Gillingham	-	-	-	-	3.48	3.48
Rusthall	-	2.24	-	-	-	2.24
Gravesend	-	-	2.13	-	-	2.13
Rochester	-	-	-	-	1.44	1.44
Groombridge	-	0.94	-	-	-	0.94
Other	0.24	1.70	0.24	1.84	0.53	4.56
Other sub-total	**32.82**	**32.62**	**32.58**	**11.20**	**18.22**	**127.43**
Total	**128.32**	**56.11**	**116.97**	**132.10**	**94.83**	**528.34**

Sources:

Tables 3 and 4

Table 9 - Food stores in Tonbridge and Malling - Sales floorspace and benchmark turnovers

Zone	Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Zone 1 Tonbridge Urban	Aldi, Swanmead Way	1,177	80%	941	£11,748	£11.06
	Budgens, Hadlow Road East, Three Elms	315	95%	300	£8,666	£2.60
	Budgens, Shipbourne Road	315	95%	300	£8,666	£2.60
	Co-op, Martin Hardie Way, Higham Lane	220	95%	209	£12,059	£2.53
	Co-op, York Parade	414	95%	394	£12,059	£4.75
	Iceland (The Food Warehouse), Cannon Lane	728	95%	692	£7,180	£4.97
	Iceland, Sovereign Way	348	95%	330	£7,180	£2.37
	Lidl, Quarry Hill Road	1,057	80%	845	£8,585	£7.26
	Marks & Spencer Foodhall, Cannon Lane	1,012	95%	961	£10,934	£10.51
	Sainsbury's Local, Shipbourne Road	232	95%	220	£13,869	£3.06
	Sainsbury's Superstore, Angel Lane	2,573	80%	2,058	£13,869	£28.55
	Waitrose, Sovereign Way	1,820	90%	1,638	£15,126	£24.77
	Zone 1 sub-total	-	-	-	-	**£105.01**
Zone 3 Tonbridge Rural North	Co-op, Pound Road, East Peckham	124	95%	118	£12,059	£1.42
	Co-op, Station Approach, Borough Green	258	95%	245	£12,059	£2.95
	Marks & Spencer Simply Food, Tonbridge Road, Hildenborough	84	95%	79	£10,934	£0.87
	Sainsbury's Local, Wrotham Road, Borough Green	192	95%	183	£13,869	£2.53
	Zone 3 sub-total	-	-	-	-	**£7.77**
Zone 4 Kings Hill / West Malling	Aldi, Alexander Grove, Kings Hill, West Malling	978	80%	782	£11,748	£9.19
	Aldi, Hermitage Lane, Aylesford	1,088	80%	871	£11,748	£10.23
	Asda, Alexander Grove, Kings Hill, West Malling	3,897	70%	2,728	£11,105	£30.29
	Little Waitrose, Fortune Way, Kings Hill, West Malling	447	95%	425	£15,126	£6.42
	Marks & Spencer Foodhall, The Junction Retail Park, Aylesford	1,495	95%	1,420	£10,934	£15.53
	Morrisons, New Hythe Lane, Aylesford	1,402	80%	1,122	£10,904	£12.23
	Sainsbury's Superstore, Quarry Wood, off London Road, Aylesford	4,528	60%	2,717	£13,869	£37.68
	Tesco Express, London Road, Larkfield, Aylesford	116	95%	110	£16,226	£1.79
	Tesco Superstore, High Street, West Malling	897	90%	808	£16,226	£13.10
	Zone 4 sub-total	-	-	-	-	**£136.46**
Zone 5 Snodland / Aylesford	Co-op, Village Road, Peters Village	194	95%	185	£12,059	£2.23
	Marks & Spencer Simply Food, Holborough Road, Snodland	84	95%	79	£10,934	£0.87
	Tesco Extra, Lunsford Park, Aylesford	5,489	70%	3,842	£16,226	£62.34
	Zone 5 sub-total	-	-	-	-	**£65.44**
Total		**31,483**		**24,601**		**£314.68**

Sources:

ORC StorePoint (2025), VOA and Global Data (2024)

Table 10 - Tonbridge & Malling convenience goods expenditure 2024 to 2042 (£m)

Zone / Destination	2024	2027	2032	2037	2042
Available expenditure					
Zone 1 - Tonbridge	108.18	111.00	117.01	122.81	128.77
Zone 3 - Borough Green	10.01	10.33	10.96	11.58	12.20
Zone 4 - Kings Hill	54.64	56.34	59.80	63.13	66.51
Zone 4 - Martin Square Larkfield	28.66	29.56	31.38	33.14	34.92
Zone 4 - West Malling	7.46	7.70	8.17	8.63	9.09
Zone 5 - Snodland	10.26	10.58	11.23	11.86	12.50
Other Tonbridge & Malling	106.41	107.61	114.08	120.30	126.64
Total	**325.63**	**335.13**	**354.78**	**373.69**	**393.03**
Turnover of existing facilities					
Zone 1 - Tonbridge	108.18	108.18	108.07	107.53	107.00
Zone 3 - Borough Green	10.01	10.01	10.00	9.95	9.90
Zone 4 - Kings Hill	54.64	54.64	54.59	54.32	54.05
Zone 4 - Martin Square Larkfield	28.66	28.66	28.63	28.49	28.35
Zone 4 - West Malling	7.46	7.46	7.45	7.42	7.38
Zone 5 - Snodland	10.26	10.26	10.25	10.20	10.14
Other Tonbridge & Malling	106.41	106.41	106.30	105.77	105.25
Total	**325.63**	**325.63**	**325.30**	**323.68**	**322.06**
Surplus / deficit expenditure					
Zone 1 - Tonbridge	-	2.82	8.94	15.27	21.78
Zone 3 - Borough Green	-	0.31	0.96	1.62	2.30
Zone 4 - Kings Hill	-	1.70	5.21	8.81	12.46
Zone 4 - Martin Square Larkfield	-	0.90	2.75	4.65	6.58
Zone 4 - West Malling	-	0.23	0.72	1.21	1.71
Zone 5 - Snodland	-	0.32	0.98	1.66	2.35
Other Tonbridge & Malling	-	3.15	9.73	16.47	23.33
Total	-	**9.50**	**29.48**	**50.01**	**70.96**

Sources:

Tables 5-9 excl. figures for Zone 2, which falls outside of Tonbridge & Malling

Table 11 - Tonbridge & Malling convenience goods capacity to 2042

Zone / Destination	2027	2032	2037	2042
Turnover density new floorspace (£ per sq m)*	£12,137	£12,125	£12,064	£12,004
Floorspace projection (sq m net)				
Zone 1 - Tonbridge	230	740	1,270	1,810
Zone 3 - Borough Green	30	80	130	190
Zone 4 - Kings Hill	140	430	730	1,040
Zone 4 - Martin Square Larkfield	70	230	390	550
Zone 4 - West Malling	20	60	100	140
Zone 5 - Snodland	30	80	140	200
Other Tonbridge & Malling	260	800	1,370	1,940
Total	**780**	**2,430**	**4,150**	**5,910**
Floorspace projection (sq m gross)				
Zone 1 - Tonbridge	330	1,060	1,810	2,590
Zone 3 - Borough Green	40	110	190	270
Zone 4 - Kings Hill	200	610	1,040	1,490
Zone 4 - Martin Square Larkfield	100	330	560	790
Zone 4 - West Malling	30	90	140	200
Zone 5 - Snodland	40	110	200	290
Other Tonbridge & Malling	370	1,140	1,960	2,770
Total	**1,110**	**3,470**	**5,930**	**8,440**

Sources:

Table 10

Figures may not sum due to rounding

**combined company average sales density for 8 main food operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)*

Appendix 4 Comparison goods assessment

Table 1 - Study area population projections

Zone	2024	2027	2032	2037	2042
1	37,705	39,722	43,090	46,302	49,499
2	17,795	17,950	18,245	18,518	18,835
3	31,647	33,340	36,167	38,862	41,546
4	38,701	40,771	44,229	47,525	50,807
5	28,129	29,634	32,147	34,542	36,928
Total	**153,977**	**161,417**	**173,878**	**185,749**	**197,616**

Sources:

Standard method population projections

Experian population projections (March 2025) for Zone 2

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

Zone	2024	2027	2032	2037	2042
1	3,210	3,289	3,635	4,037	4,526
2	4,043	4,141	4,578	5,084	5,700
3	3,813	3,906	4,318	4,795	5,376
4	3,277	3,357	3,710	4,121	4,620
5	3,136	3,213	3,551	3,944	4,422

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2024	2027	2032	2037	2042
1	121.05	130.63	156.64	186.93	224.04
2	71.94	74.34	83.52	94.15	107.35
3	120.67	130.23	156.16	186.36	223.35
4	126.82	136.86	164.11	195.84	234.72
5	88.22	95.21	114.17	136.24	163.29
Total	**528.70**	**567.26**	**674.60**	**799.53**	**952.75**

Sources:

Tables 1 and 2

Table 4 - Base year 2024 comparison goods market share by zone (%)

Zone / Destination	1	2	3	4	5	Total
Zone 1 - Tonbridge	22.6%	8.1%	12.7%	0.8%	0.0%	9.4%
Zone 1 - York Parade	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Other, Cannon Lane	5.4%	3.5%	4.3%	0.6%	0.0%	2.8%
Zone 1 - Other	0.8%	0.3%	0.7%	0.0%	0.0%	0.4%
Zone 2 - Other	0.0%	1.1%	0.0%	0.0%	0.0%	0.2%
Zone 3 - Borough Green	0.0%	0.0%	1.1%	0.0%	0.0%	0.2%
Zone 3 - East Peckham	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
Zone 3 - Hadlow	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%
Zone 3 - Hildenborough	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
Zone 3 - Other	0.0%	0.0%	0.9%	1.0%	0.1%	0.5%
Zone 4 - Kings Hill	0.6%	0.0%	0.6%	6.7%	2.3%	2.3%
Zone 4 - Martin Square Larkfield	0.1%	0.6%	8.9%	33.7%	28.0%	14.9%
Zone 4 - West Malling	0.0%	0.2%	0.5%	2.5%	0.2%	0.8%
Zone 4 - Twisden Road, East Malling	0.0%	0.0%	0.0%	0.8%	0.0%	0.2%
Zone 4 - Little Market Row, Leybourne	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%
Zone 4 - Other, Quarry Wood	0.0%	0.0%	0.8%	3.2%	3.8%	1.6%
Zone 4 - Other	0.0%	0.0%	0.0%	0.5%	0.2%	0.2%
Zone 5 - Other	0.0%	0.0%	0.7%	4.6%	10.1%	3.0%
Tonbridge & Malling sub-total	**29.7%**	**13.9%**	**32.5%**	**54.3%**	**44.8%**	**36.6%**
Tunbridge Wells	45.3%	60.7%	26.3%	6.7%	0.6%	26.4%
Gillingham	0.0%	0.0%	0.5%	0.8%	7.8%	1.6%
Chatham	0.6%	0.0%	0.4%	0.6%	8.2%	1.7%
Sevenoaks	1.0%	1.9%	11.7%	0.6%	0.1%	3.3%
Maidstone	3.8%	2.3%	8.7%	24.7%	25.6%	13.4%
Bluewater	14.5%	8.3%	11.5%	6.0%	7.5%	9.8%
London	2.0%	0.5%	1.3%	1.0%	0.2%	1.1%
Lakeside	0.5%	0.1%	1.0%	1.0%	0.7%	0.7%
Paddock Wood	0.2%	0.7%	0.9%	0.1%	0.1%	0.4%
Other	2.5%	11.5%	5.3%	4.1%	4.3%	5.1%
Other sub-total	**70.3%**	**86.1%**	**67.5%**	**45.7%**	**55.2%**	**63.4%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Sources:

NEMS Household Survey (June 2023) and Lichfields' analysis.

Table 5 - Base year 2024 comparison goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2024	**121.05**	**71.94**	**120.67**	**126.82**	**88.22**	**528.70**
Zone 1 - Tonbridge	27.38	5.82	15.34	0.99	-	49.51
Zone 1 - York Parade	0.18	-	-	-	-	0.18
Zone 1 - Other, Cannon Lane	6.51	2.52	5.25	0.71	-	14.98
Zone 1 - Other	0.97	0.25	0.86	-	-	2.07
Zone 2 - Other	-	0.82	-	-	-	0.82
Zone 3 - Borough Green	-	-	1.28	-	-	1.28
Zone 3 - East Peckham	-	-	0.44	-	-	0.44
Zone 3 - Hadlow	-	-	0.31	-	-	0.31
Zone 3 - Hildenborough	-	-	0.51	-	-	0.51
Zone 3 - Other	0.05	-	1.11	1.22	0.07	2.46
Zone 4 - Kings Hill	0.67	-	0.72	8.46	2.06	11.91
Zone 4 - Martin Square Larkfield	0.15	0.46	10.78	42.78	24.74	78.91
Zone 4 - West Malling	-	0.13	0.63	3.14	0.19	4.10
Zone 4 - Twisden Road, East Malling	-	-	-	1.00	-	1.00
Zone 4 - Little Market Row, Leybourne	-	-	0.07	0.07	-	0.14
Zone 4 - Other, Quarry Wood	-	-	1.01	4.09	3.33	8.43
Zone 4 - Other	-	-	-	0.58	0.21	0.79
Zone 5 - Other	-	-	0.88	5.89	8.89	15.65
Tonbridge & Malling sub-total	**35.91**	**10.00**	**39.19**	**68.92**	**39.49**	**193.51**
Tunbridge Wells	54.78	43.68	31.80	8.55	0.54	139.34
Gillingham	-	-	0.57	1.03	6.90	8.50
Chatham	0.77	-	0.44	0.76	7.25	9.22
Sevenoaks	1.21	1.39	14.15	0.76	0.06	17.57
Maidstone	4.56	1.68	10.54	31.35	22.61	70.74
Bluewater	17.55	5.95	13.87	7.61	6.64	51.62
London	2.43	0.40	1.53	1.29	0.19	5.84
Lakeside	0.59	0.04	1.15	1.24	0.60	3.62
Paddock Wood	0.19	0.53	1.05	0.11	0.13	2.01
Other	3.05	8.29	6.39	5.20	3.81	26.73
Other sub-total	**85.13**	**61.94**	**81.48**	**57.90**	**48.73**	**335.19**
Total	**121.05**	**71.94**	**120.67**	**126.82**	**88.22**	**528.70**

Sources:

Tables 3 and 4

Table 6 - Future 2027 comparison goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2027	**130.63**	**74.34**	**130.23**	**136.86**	**95.21**	**567.26**
Zone 1 - Tonbridge	29.54	6.01	16.55	1.07	-	53.17
Zone 1 - York Parade	0.20	-	-	-	-	0.20
Zone 1 - Other, Cannon Lane	7.03	2.60	5.66	0.76	-	16.05
Zone 1 - Other	1.05	0.25	0.92	-	-	2.22
Zone 2 - Other	-	0.85	-	-	-	0.85
Zone 3 - Borough Green	-	-	1.38	-	-	1.38
Zone 3 - East Peckham	-	-	0.48	-	-	0.48
Zone 3 - Hadlow	-	-	0.34	-	-	0.34
Zone 3 - Hildenborough	-	-	0.55	-	-	0.55
Zone 3 - Other	0.05	-	1.20	1.31	0.08	2.65
Zone 4 - Kings Hill	0.73	-	0.78	9.12	2.22	12.85
Zone 4 - Martin Square Larkfield	0.16	0.48	11.64	46.17	26.70	85.13
Zone 4 - West Malling	-	0.14	0.68	3.39	0.21	4.42
Zone 4 - Twisden Road, East Malling	-	-	-	1.08	-	1.08
Zone 4 - Little Market Row, Leybourne	-	-	0.08	0.08	-	0.15
Zone 4 - Other, Quarry Wood	-	-	1.09	4.42	3.59	9.10
Zone 4 - Other	-	-	-	0.63	0.23	0.86
Zone 5 - Other	-	-	0.95	6.35	9.59	16.89
Tonbridge & Malling sub-total	**38.76**	**10.33**	**42.30**	**74.38**	**42.61**	**208.37**
Tunbridge Wells	59.12	45.13	34.31	9.22	0.58	148.37
Gillingham	-	-	0.61	1.11	7.45	9.17
Chatham	0.83	-	0.47	0.82	7.82	9.95
Sevenoaks	1.30	1.44	15.27	0.82	0.06	18.90
Maidstone	4.92	1.74	11.37	33.83	24.40	76.26
Bluewater	18.94	6.14	14.97	8.21	7.17	55.43
London	2.62	0.41	1.65	1.40	0.21	6.28
Lakeside	0.64	0.04	1.24	1.34	0.65	3.90
Paddock Wood	0.21	0.54	1.14	0.12	0.14	2.15
Other	3.29	8.57	6.89	5.61	4.11	28.47
Other sub-total	**91.87**	**64.01**	**87.93**	**62.48**	**52.59**	**358.89**
Total	**130.63**	**74.34**	**130.23**	**136.86**	**95.21**	**567.26**

Sources:

Tables 3 and 4

Table 7 - Future 2032 comparison goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2032	**156.64**	**83.52**	**156.16**	**164.11**	**114.17**	**674.60**
Zone 1 - Tonbridge	35.43	6.75	19.85	1.28	-	63.30
Zone 1 - York Parade	0.23	-	-	-	-	0.23
Zone 1 - Other, Cannon Lane	8.43	2.92	6.79	0.91	-	19.05
Zone 1 - Other	1.25	0.29	1.11	-	-	2.65
Zone 2 - Other	-	0.96	-	-	-	0.96
Zone 3 - Borough Green	-	-	1.66	-	-	1.66
Zone 3 - East Peckham	-	-	0.57	-	-	0.57
Zone 3 - Hadlow	-	-	0.40	-	-	0.40
Zone 3 - Hildenborough	-	-	0.66	-	-	0.66
Zone 3 - Other	0.07	-	1.44	1.58	0.09	3.18
Zone 4 - Kings Hill	0.87	-	0.93	10.94	2.66	15.41
Zone 4 - Martin Square Larkfield	0.19	0.53	13.95	55.36	32.01	102.05
Zone 4 - West Malling	-	0.16	0.82	4.06	0.25	5.28
Zone 4 - Twisden Road, East Malling	-	-	-	1.29	-	1.29
Zone 4 - Little Market Row, Leybourne	-	-	0.09	0.09	-	0.18
Zone 4 - Other, Quarry Wood	-	-	1.31	5.30	4.31	10.92
Zone 4 - Other	-	-	-	0.76	0.27	1.03
Zone 5 - Other	-	-	1.14	7.62	11.50	20.26
Tonbridge & Malling sub-total	**46.47**	**11.60**	**50.72**	**89.19**	**51.10**	**249.08**
Tunbridge Wells	70.89	50.71	41.15	11.06	0.70	174.51
Gillingham	-	-	0.74	1.33	8.93	11.00
Chatham	1.00	-	0.56	0.99	9.38	11.93
Sevenoaks	1.56	1.61	18.31	0.98	0.08	22.55
Maidstone	5.90	1.95	13.64	40.57	29.25	91.32
Bluewater	22.71	6.90	17.95	9.85	8.60	66.01
London	3.15	0.46	1.98	1.67	0.25	7.50
Lakeside	0.77	0.04	1.48	1.61	0.78	4.68
Paddock Wood	0.25	0.61	1.36	0.14	0.17	2.53
Other	3.95	9.62	8.26	6.73	4.93	33.49
Other sub-total	**110.17**	**71.92**	**105.44**	**74.92**	**63.07**	**425.52**
Total	**156.64**	**83.52**	**156.16**	**164.11**	**114.17**	**674.60**

Sources:

Tables 3 and 4

Table 8 - Future 2037 comparison goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2037	**186.93**	**94.15**	**186.36**	**195.84**	**136.24**	**799.53**
Zone 1 - Tonbridge	42.28	7.61	23.68	1.52	-	75.10
Zone 1 - York Parade	0.28	-	-	-	-	0.28
Zone 1 - Other, Cannon Lane	10.06	3.29	8.10	1.09	-	22.54
Zone 1 - Other	1.50	0.32	1.32	-	-	3.14
Zone 2 - Other	-	1.08	-	-	-	1.08
Zone 3 - Borough Green	-	-	1.98	-	-	1.98
Zone 3 - East Peckham	-	-	0.68	-	-	0.68
Zone 3 - Hadlow	-	-	0.48	-	-	0.48
Zone 3 - Hildenborough	-	-	0.79	-	-	0.79
Zone 3 - Other	0.08	-	1.72	1.88	0.11	3.79
Zone 4 - Kings Hill	1.04	-	1.11	13.06	3.18	18.39
Zone 4 - Martin Square Larkfield	0.23	0.60	16.65	66.07	38.20	121.75
Zone 4 - West Malling	-	0.18	0.97	4.85	0.30	6.30
Zone 4 - Twisden Road, East Malling	-	-	-	1.54	-	1.54
Zone 4 - Little Market Row, Leybourne	-	-	0.11	0.11	-	0.22
Zone 4 - Other, Quarry Wood	-	-	1.56	6.32	5.14	13.03
Zone 4 - Other	-	-	-	0.90	0.32	1.23
Zone 5 - Other	-	-	1.36	9.09	13.72	24.17
Tonbridge & Malling sub-total	**55.46**	**13.08**	**60.53**	**106.43**	**60.98**	**296.48**
Tunbridge Wells	84.60	57.16	49.10	13.20	0.84	204.90
Gillingham	-	-	0.88	1.59	10.66	13.12
Chatham	1.19	-	0.67	1.18	11.20	14.24
Sevenoaks	1.87	1.82	21.85	1.17	0.09	26.80
Maidstone	7.04	2.20	16.28	48.42	34.91	108.84
Bluewater	27.10	7.78	21.43	11.75	10.26	78.32
London	3.75	0.52	2.36	2.00	0.30	8.92
Lakeside	0.91	0.05	1.77	1.92	0.93	5.58
Paddock Wood	0.30	0.69	1.63	0.17	0.20	2.98
Other	4.71	10.85	9.86	8.03	5.88	39.33
Other sub-total	**131.47**	**81.07**	**125.83**	**89.41**	**75.26**	**503.04**
Total	**186.93**	**94.15**	**186.36**	**195.84**	**136.24**	**799.53**

Sources:

Tables 3 and 4

Table 9 - Future 2042 comparison goods shopping patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2042	**224.04**	**107.35**	**223.35**	**234.72**	**163.29**	**952.75**
Zone 1 - Tonbridge	50.67	8.68	28.39	1.83	-	89.56
Zone 1 - York Parade	0.34	-	-	-	-	0.34
Zone 1 - Other, Cannon Lane	12.05	3.75	9.71	1.31	-	26.83
Zone 1 - Other	1.79	0.37	1.58	-	-	3.74
Zone 2 - Other	-	1.23	-	-	-	1.23
Zone 3 - Borough Green	-	-	2.37	-	-	2.37
Zone 3 - East Peckham	-	-	0.82	-	-	0.82
Zone 3 - Hadlow	-	-	0.58	-	-	0.58
Zone 3 - Hildenborough	-	-	0.94	-	-	0.94
Zone 3 - Other	0.09	-	2.06	2.25	0.14	4.54
Zone 4 - Kings Hill	1.25	-	1.34	15.65	3.81	22.04
Zone 4 - Martin Square Larkfield	0.27	0.69	19.96	79.18	45.79	145.88
Zone 4 - West Malling	-	0.20	1.17	5.81	0.36	7.54
Zone 4 - Twisden Road, East Malling	-	-	-	1.85	-	1.85
Zone 4 - Little Market Row, Leybourne	-	-	0.13	0.13	-	0.26
Zone 4 - Other, Quarry Wood	-	-	1.87	7.58	6.16	15.61
Zone 4 - Other	-	-	-	1.08	0.39	1.47
Zone 5 - Other	-	-	1.63	10.89	16.45	28.97
Tonbridge & Malling sub-total	**66.47**	**14.92**	**72.54**	**127.56**	**73.08**	**354.57**
Tunbridge Wells	101.40	65.18	58.85	15.82	1.00	242.25
Gillingham	-	-	1.05	1.90	12.77	15.73
Chatham	1.43	-	0.81	1.41	13.42	17.06
Sevenoaks	2.24	2.07	26.19	1.41	0.11	32.02
Maidstone	8.44	2.51	19.51	58.03	41.84	130.32
Bluewater	32.48	8.87	25.68	14.08	12.30	93.41
London	4.50	0.59	2.83	2.39	0.36	10.67
Lakeside	1.10	0.06	2.12	2.30	1.11	6.68
Paddock Wood	0.35	0.79	1.95	0.20	0.24	3.54
Other	5.64	12.37	11.82	9.62	7.05	46.51
Other sub-total	**157.57**	**92.44**	**150.81**	**107.16**	**90.20**	**598.18**
Total	**224.04**	**107.35**	**223.35**	**234.72**	**163.29**	**952.75**

Sources:

Tables 3 and 4

Table 10 - Tonbridge & Malling comparison goods expenditure 2024 to 2042 (£m)

Zone / Destination	2024	2027	2032	2037	2042
Available expenditure					
Zone 1 - Tonbridge	49.51	53.17	63.30	75.10	89.56
Zone 3 - Borough Green	1.28	1.38	1.66	1.98	2.37
Zone 4 - Kings Hill	11.91	12.85	15.41	18.39	22.04
Zone 4 - Martin Square Larkfield	78.91	85.13	102.05	121.75	145.88
Zone 4 - West Malling	4.10	4.42	5.28	6.30	7.54
Other Tonbridge & Malling	46.97	50.56	60.42	71.89	85.95
Total	**192.68**	**207.52**	**248.13**	**295.40**	**353.34**
Turnover of existing facilities					
Zone 1 - Tonbridge	49.51	51.67	57.89	64.86	72.67
Zone 3 - Borough Green	1.28	1.34	1.50	1.68	1.88
Zone 4 - Kings Hill	11.91	12.43	13.92	15.60	17.48
Zone 4 - Martin Square Larkfield	78.91	82.34	92.26	103.37	115.81
Zone 4 - West Malling	4.10	4.28	4.79	5.37	6.01
Other Tonbridge & Malling	46.97	49.01	54.92	61.53	68.94
Total	**192.68**	**201.07**	**225.28**	**252.41**	**282.80**
Surplus / deficit expenditure					
Zone 1 - Tonbridge	-	1.50	5.41	10.23	16.89
Zone 3 - Borough Green	-	0.05	0.16	0.30	0.49
Zone 4 - Kings Hill	-	0.42	1.49	2.79	4.56
Zone 4 - Martin Square Larkfield	-	2.79	9.79	18.38	30.07
Zone 4 - West Malling	-	0.14	0.49	0.93	1.52
Other Tonbridge & Malling	-	1.55	5.50	10.36	17.01
Total	**-**	**6.45**	**22.85**	**43.00**	**70.54**

Sources:

Tables 5-8 excl. figures for Zone 2, which falls outside of Tonbridge & Malling

Table 11 - Tonbridge & Malling comparison goods capacity to 2042

Zone / Destination	2024	2027	2032	2037	2042
Turnover density new floorspace (£ per sq m)	£7,000	£7,305	£8,184	£9,170	£10,274
Floorspace projection (sq m net)					
Zone 1 - Tonbridge	-	210	660	1,120	1,640
Zone 3 - Borough Green	-	10	20	30	50
Zone 4 - Kings Hill	-	60	180	300	440
Zone 4 - Martin Square Larkfield	-	380	1,200	2,000	2,930
Zone 4 - West Malling	-	20	60	100	150
Other Tonbridge & Malling	-	210	670	1,130	1,660
Total	-	**880**	**2,790**	**4,690**	**6,870**
Floorspace projection (sq m gross)					
Zone 1 - Tonbridge	-	300	940	1,600	2,340
Zone 3 - Borough Green	-	10	30	40	70
Zone 4 - Kings Hill	-	90	260	430	630
Zone 4 - Martin Square Larkfield	-	540	1,710	2,860	4,190
Zone 4 - West Malling	-	30	90	140	210
Other Tonbridge & Malling	-	300	960	1,610	2,370
Total	-	**1,260**	**3,990**	**6,700**	**9,810**

Sources:

Table 10

Figures may not sum due to rounding

Appendix 5 Food/beverage assessment

Table 1 - Study area population projections

Zone	2024	2027	2032	2037	2042
1	37,705	39,722	43,090	46,302	49,499
2	17,795	17,950	18,245	18,518	18,835
3	31,647	33,340	36,167	38,862	41,546
4	38,701	40,771	44,229	47,525	50,807
5	28,129	29,634	32,147	34,542	36,928
Total	**153,977**	**161,417**	**173,878**	**185,749**	**197,616**

Sources:

Standard method population projections

Experian population projections (March 2025) for Zone 2

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

Zone	2024	2027	2032	2037	2042
1	1,918	1,935	1,996	2,067	2,140
2	2,383	2,405	2,480	2,568	2,659
3	2,148	2,167	2,235	2,315	2,397
4	1,886	1,903	1,963	2,033	2,105
5	1,752	1,767	1,823	1,887	1,954

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

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

Zone	2024	2027	2032	2037	2042
1	72.31	76.87	86.00	95.69	105.93
2	42.41	43.17	45.25	47.56	50.09
3	67.98	72.26	80.85	89.96	99.59
4	73.00	77.60	86.82	96.61	106.94
5	49.27	52.37	58.60	65.20	72.17
Total	**304.97**	**322.27**	**357.52**	**395.01**	**434.72**

Sources:

Tables 1 and 2

Table 4 - Base year 2024 food / beverage market share by zone (%)

Zone / Destination	1	2	3	4	5	Total
Zone 1 - Tonbridge	52.1%	10.9%	18.9%	0.0%	0.0%	18.2%
Zone 1 - Other	1.0%	0.0%	1.3%	0.0%	0.0%	0.5%
Zone 2 - Other	1.4%	18.1%	4.1%	0.6%	0.0%	3.5%
Zone 3 - Borough Green	0.0%	0.0%	2.0%	0.0%	0.0%	0.5%
Zone 3 - East Peckham	0.0%	0.0%	1.6%	0.0%	0.0%	0.3%
Zone 3 - Hadlow	0.0%	0.9%	3.1%	1.4%	0.6%	1.2%
Zone 3 - Hildenborough	0.4%	0.2%	6.0%	0.0%	0.0%	1.4%
Zone 3 - Other	1.7%	0.0%	29.1%	8.1%	1.9%	8.9%
Zone 4 - Kings Hill	0.0%	0.0%	0.6%	10.8%	0.0%	2.6%
Zone 4 - Martin Square Larkfield	0.0%	0.0%	0.0%	8.7%	2.2%	2.4%
Zone 4 - West Malling	0.0%	0.0%	2.1%	23.6%	20.9%	9.7%
Zone 4 - Twisden Road, East Malling	0.0%	0.0%	0.0%	0.9%	1.9%	0.6%
Zone 4 - Little Market Row, Leybourne	0.0%	0.0%	0.0%	5.3%	3.8%	1.9%
Zone 4 - Other	0.0%	0.0%	0.6%	3.3%	1.7%	1.2%
Zone 5 - Snodland	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%
Zone 5 - Other	0.0%	0.0%	0.0%	5.8%	11.6%	3.5%
Tonbridge & Malling sub-total	**56.6%**	**30.1%**	**69.3%**	**68.6%**	**45.0%**	**56.6%**
Tunbridge Wells	30.3%	37.2%	3.4%	0.0%	0.0%	12.9%
Maidstone	1.9%	2.5%	1.0%	10.7%	26.4%	8.4%
London	1.7%	7.1%	7.6%	7.1%	8.7%	6.1%
Sevenoaks	7.6%	4.8%	8.3%	0.0%	0.8%	4.4%
Rochester	0.0%	0.0%	0.0%	8.2%	8.4%	3.5%
Ashford	0.7%	0.0%	0.0%	3.2%	1.0%	1.1%
Bluewater	0.0%	0.0%	2.5%	0.0%	0.6%	0.6%
Other	1.1%	18.4%	8.0%	2.2%	9.2%	6.5%
Other sub-total	**43.4%**	**69.9%**	**30.7%**	**31.4%**	**55.0%**	**43.4%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Sources:

NEMS Household Survey (June 2023) and Lichfields' analysis.

Table 5 - Base year 2024 food / beverage expenditure patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2024	**72.31**	**42.41**	**67.98**	**73.00**	**49.27**	**304.97**
Zone 1 - Tonbridge	37.68	4.61	12.82	-	-	55.11
Zone 1 - Other	0.72	-	0.86	-	-	1.58
Zone 2 - Other	1.03	7.66	2.77	0.45	-	11.90
Zone 3 - Borough Green	-	-	1.37	-	-	1.37
Zone 3 - East Peckham	-	-	1.06	-	-	1.06
Zone 3 - Hadlow	-	0.40	2.08	0.99	0.29	3.76
Zone 3 - Hildenborough	0.31	0.09	4.07	-	-	4.46
Zone 3 - Other	1.20	-	19.80	5.94	0.92	27.86
Zone 4 - Kings Hill	-	-	0.43	7.88	-	8.31
Zone 4 - Martin Square Larkfield	-	-	-	6.38	1.08	7.46
Zone 4 - West Malling	-	-	1.44	17.20	10.32	28.95
Zone 4 - Twisden Road, East Malling	-	-	-	0.69	0.92	1.61
Zone 4 - Little Market Row, Leybourne	-	-	-	3.89	1.88	5.78
Zone 4 - Other	-	-	0.43	2.42	0.86	3.71
Zone 5 - Snodland	-	-	-	-	0.19	0.19
Zone 5 - Other	-	-	-	4.24	5.71	9.95
Tonbridge & Malling sub-total	**40.94**	**12.76**	**47.12**	**50.07**	**22.18**	**173.08**
Tunbridge Wells	21.88	15.76	2.29	-	-	39.93
Maidstone	1.40	1.05	0.70	7.83	12.99	23.98
London	1.26	3.00	5.15	5.21	4.27	18.89
Sevenoaks	5.49	2.02	5.63	-	0.38	13.52
Rochester	-	-	-	6.00	4.15	10.15
Ashford	0.51	-	-	2.30	0.49	3.30
Bluewater	-	-	1.69	-	0.29	1.97
Other	0.82	7.82	5.41	1.59	4.52	20.16
Other sub-total	**31.37**	**29.65**	**20.86**	**22.93**	**27.09**	**131.90**
Total	**72.31**	**42.41**	**67.98**	**73.00**	**49.27**	**304.97**

Sources:

Tables 3 and 4

Table 6 - Future 2027 food / beverage expenditure patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2027	**76.87**	**43.17**	**72.26**	**77.60**	**52.37**	**322.27**
Zone 1 - Tonbridge	40.06	4.69	13.63	-	-	58.37
Zone 1 - Other	0.77	-	0.91	-	-	1.68
Zone 2 - Other	1.09	7.79	2.94	0.48	-	12.31
Zone 3 - Borough Green	-	-	1.45	-	-	1.45
Zone 3 - East Peckham	-	-	1.13	-	-	1.13
Zone 3 - Hadlow	-	0.41	2.21	1.05	0.30	3.98
Zone 3 - Hildenborough	0.33	0.09	4.32	-	-	4.74
Zone 3 - Other	1.28	-	21.05	6.31	0.98	29.62
Zone 4 - Kings Hill	-	-	0.46	8.38	-	8.83
Zone 4 - Martin Square Larkfield	-	-	-	6.78	1.15	7.93
Zone 4 - West Malling	-	-	1.53	18.28	10.97	30.77
Zone 4 - Twisden Road, East Malling	-	-	-	0.73	0.98	1.72
Zone 4 - Little Market Row, Leybourne	-	-	-	4.14	2.00	6.14
Zone 4 - Other	-	-	0.46	2.57	0.91	3.94
Zone 5 - Snodland	-	-	-	-	0.20	0.20
Zone 5 - Other	-	-	-	4.51	6.07	10.58
Tonbridge & Malling sub-total	**43.52**	**12.99**	**50.09**	**53.23**	**23.58**	**183.40**
Tunbridge Wells	23.26	16.05	2.43	-	-	41.73
Maidstone	1.49	1.07	0.74	8.32	13.81	25.44
London	1.34	3.05	5.47	5.54	4.54	19.94
Sevenoaks	5.84	2.05	5.99	-	0.41	14.28
Rochester	-	-	-	6.38	4.41	10.79
Ashford	0.55	-	-	2.45	0.52	3.51
Bluewater	-	-	1.79	-	0.30	2.10
Other	0.87	7.96	5.75	1.69	4.81	21.07
Other sub-total	**33.34**	**30.18**	**22.17**	**24.37**	**28.80**	**138.87**
Total	**76.87**	**43.17**	**72.26**	**77.60**	**52.37**	**322.27**

Sources:

Tables 3 and 4

Table 7 - Future 2032 food / beverage expenditure patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2032	**86.00**	**45.25**	**80.85**	**86.82**	**58.60**	**357.52**
Zone 1 - Tonbridge	44.82	4.92	15.25	-	-	64.98
Zone 1 - Other	0.86	-	1.02	-	-	1.88
Zone 2 - Other	1.22	8.17	3.29	0.53	-	13.22
Zone 3 - Borough Green	-	-	1.63	-	-	1.63
Zone 3 - East Peckham	-	-	1.26	-	-	1.26
Zone 3 - Hadlow	-	0.43	2.48	1.18	0.34	4.42
Zone 3 - Hildenborough	0.37	0.10	4.84	-	-	5.30
Zone 3 - Other	1.43	-	23.55	7.06	1.10	33.14
Zone 4 - Kings Hill	-	-	0.51	9.37	-	9.88
Zone 4 - Martin Square Larkfield	-	-	-	7.59	1.29	8.88
Zone 4 - West Malling	-	-	1.71	20.45	12.27	34.43
Zone 4 - Twisden Road, East Malling	-	-	-	0.82	1.10	1.92
Zone 4 - Little Market Row, Leybourne	-	-	-	4.63	2.24	6.87
Zone 4 - Other	-	-	0.51	2.88	1.02	4.41
Zone 5 - Snodland	-	-	-	-	0.23	0.23
Zone 5 - Other	-	-	-	5.04	6.79	11.83
Tonbridge & Malling sub-total	**48.69**	**13.61**	**56.04**	**59.55**	**26.38**	**204.28**
Tunbridge Wells	26.02	16.82	2.72	-	-	45.56
Maidstone	1.67	1.12	0.83	9.31	15.45	28.39
London	1.50	3.20	6.12	6.19	5.08	22.10
Sevenoaks	6.53	2.15	6.70	-	0.45	15.84
Rochester	-	-	-	7.14	4.93	12.07
Ashford	0.61	-	-	2.74	0.58	3.93
Bluewater	-	-	2.00	-	0.34	2.34
Other	0.98	8.34	6.43	1.89	5.38	23.01
Other sub-total	**37.31**	**31.64**	**24.81**	**27.27**	**32.22**	**153.24**
Total	**86.00**	**45.25**	**80.85**	**86.82**	**58.60**	**357.52**

Sources:

Tables 3 and 4

Table 8 - Future 2037 food / beverage expenditure patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2037	**95.69**	**47.56**	**89.96**	**96.61**	**65.20**	**395.01**
Zone 1 - Tonbridge	49.87	5.17	16.96	-	-	72.00
Zone 1 - Other	0.96	-	1.14	-	-	2.09
Zone 2 - Other	1.36	8.59	3.66	0.59	-	14.21
Zone 3 - Borough Green	-	-	1.81	-	-	1.81
Zone 3 - East Peckham	-	-	1.40	-	-	1.40
Zone 3 - Hadlow	-	0.45	2.76	1.31	0.38	4.90
Zone 3 - Hildenborough	0.41	0.10	5.38	-	-	5.89
Zone 3 - Other	1.59	-	26.20	7.86	1.22	36.87
Zone 4 - Kings Hill	-	-	0.57	10.43	-	11.00
Zone 4 - Martin Square Larkfield	-	-	-	8.44	1.43	9.88
Zone 4 - West Malling	-	-	1.90	22.76	13.65	38.31
Zone 4 - Twisden Road, East Malling	-	-	-	0.91	1.22	2.14
Zone 4 - Little Market Row, Leybourne	-	-	-	5.15	2.49	7.65
Zone 4 - Other	-	-	0.57	3.20	1.14	4.91
Zone 5 - Snodland	-	-	-	-	0.25	0.25
Zone 5 - Other	-	-	-	5.61	7.56	13.17
Tonbridge & Malling sub-total	**54.18**	**14.31**	**62.36**	**66.26**	**29.35**	**226.46**
Tunbridge Wells	28.95	17.68	3.03	-	-	49.66
Maidstone	1.86	1.18	0.93	10.36	17.19	31.52
London	1.67	3.36	6.81	6.89	5.65	24.39
Sevenoaks	7.27	2.26	7.45	-	0.51	17.49
Rochester	-	-	-	7.94	5.49	13.43
Ashford	0.68	-	-	3.05	0.65	4.37
Bluewater	-	-	2.23	-	0.38	2.61
Other	1.09	8.77	7.15	2.10	5.98	25.09
Other sub-total	**41.51**	**33.25**	**27.60**	**30.34**	**35.85**	**168.56**
Total	**95.69**	**47.56**	**89.96**	**96.61**	**65.20**	**395.01**

Sources:

Tables 3 and 4

Table 9 - Future 2042 food / beverage expenditure patterns (£m)

Zone / Destination	1	2	3	4	5	Total
Expenditure 2042	**105.93**	**50.09**	**99.59**	**106.94**	**72.17**	**434.72**
Zone 1 - Tonbridge	55.20	5.45	18.78	-	-	79.43
Zone 1 - Other	1.06	-	1.26	-	-	2.32
Zone 2 - Other	1.51	9.04	4.06	0.66	-	15.27
Zone 3 - Borough Green	-	-	2.00	-	-	2.00
Zone 3 - East Peckham	-	-	1.55	-	-	1.55
Zone 3 - Hadlow	-	0.47	3.05	1.45	0.42	5.40
Zone 3 - Hildenborough	0.45	0.11	5.96	-	-	6.51
Zone 3 - Other	1.76	-	29.01	8.70	1.35	40.82
Zone 4 - Kings Hill	-	-	0.63	11.54	-	12.17
Zone 4 - Martin Square Larkfield	-	-	-	9.35	1.59	10.93
Zone 4 - West Malling	-	-	2.10	25.19	15.11	42.41
Zone 4 - Twisden Road, East Malling	-	-	-	1.01	1.35	2.36
Zone 4 - Little Market Row, Leybourne	-	-	-	5.70	2.76	8.46
Zone 4 - Other	-	-	0.63	3.54	1.26	5.43
Zone 5 - Snodland	-	-	-	-	0.28	0.28
Zone 5 - Other	-	-	-	6.21	8.36	14.58
Tonbridge & Malling sub-total	**59.98**	**15.07**	**69.03**	**73.35**	**32.49**	**249.92**
Tunbridge Wells	32.05	18.62	3.35	-	-	54.02
Maidstone	2.05	1.24	1.03	11.47	19.03	34.83
London	1.85	3.54	7.54	7.63	6.26	26.82
Sevenoaks	8.05	2.38	8.25	-	0.56	19.24
Rochester	-	-	-	8.79	6.07	14.86
Ashford	0.75	-	-	3.37	0.72	4.84
Bluewater	-	-	2.47	-	0.42	2.89
Other	1.20	9.23	7.92	2.33	6.62	27.31
Other sub-total	**45.95**	**35.02**	**30.56**	**33.59**	**39.68**	**184.80**
Total	**105.93**	**50.09**	**99.59**	**106.94**	**72.17**	**434.72**

Sources:

Tables 3 and 4

Table 10 - Tonbridge & Malling food / beverage expenditure 2024 to 2042 (£m)

Zone / Destination	2024	2027	2032	2037	2042
Available expenditure					
Zone 1 - Tonbridge	55.11	58.37	64.98	72.00	79.43
Zone 3 - Borough Green	1.37	1.45	1.63	1.81	2.00
Zone 4 - Kings Hill	8.31	8.83	9.88	11.00	12.17
Zone 4 - Martin Square Larkfield	7.46	7.93	8.88	9.88	10.93
Zone 4 - West Malling	28.95	30.77	34.43	38.31	42.41
Zone 5 - Snodland	0.19	0.20	0.23	0.25	0.28
Other Tonbridge & Malling	59.78	63.52	71.04	79.01	87.43
Total	**161.17**	**171.09**	**191.06**	**212.25**	**234.66**
Turnover of existing facilities					
Zone 1 - Tonbridge	55.11	55.17	55.44	55.72	56.00
Zone 3 - Borough Green	1.37	1.37	1.38	1.38	1.39
Zone 4 - Kings Hill	8.31	8.32	8.36	8.40	8.44
Zone 4 - Martin Square Larkfield	7.46	7.47	7.51	7.55	7.58
Zone 4 - West Malling	28.95	28.98	29.12	29.27	29.42
Zone 5 - Snodland	0.19	0.19	0.19	0.19	0.19
Other Tonbridge & Malling	59.78	59.84	60.14	60.44	60.74
Total	**161.17**	**161.33**	**162.14**	**162.95**	**163.77**
Surplus / deficit expenditure					
Zone 1 - Tonbridge	-	3.21	9.54	16.28	23.43
Zone 3 - Borough Green	-	0.08	0.25	0.43	0.61
Zone 4 - Kings Hill	-	0.52	1.52	2.59	3.73
Zone 4 - Martin Square Larkfield	-	0.46	1.37	2.33	3.35
Zone 4 - West Malling	-	1.79	5.31	9.04	12.99
Zone 5 - Snodland	-	0.01	0.04	0.06	0.09
Other Tonbridge & Malling	-	3.68	10.90	18.57	26.69
Total	**-**	**9.76**	**28.92**	**49.30**	**70.89**

Sources:

Tables 5-8

Table 11 - Tonbridge & Malling food / beverage capacity to 2042

Zone / Destination	2024	2027	2032	2037	2042
Turnover density new floorspace (£ per sq m)	£8,000	£8,008	£8,048	£8,088	£8,129
Floorspace projection (sq m net)					
Zone 1 - Tonbridge	-	400	1,190	2,010	2,880
Zone 3 - Borough Green	-	10	30	50	80
Zone 4 - Kings Hill	-	60	190	320	460
Zone 4 - Martin Square Larkfield	-	60	170	290	410
Zone 4 - West Malling	-	220	660	1,120	1,600
Zone 5 - Snodland	-	-	-	10	10
Other Tonbridge & Malling	-	460	1,350	2,300	3,280
Total	-	**1,220**	**3,590**	**6,090**	**8,720**
Floorspace projection (sq m gross)					
Zone 1 - Tonbridge	-	570	1,700	2,870	4,110
Zone 3 - Borough Green	-	10	40	70	110
Zone 4 - Kings Hill	-	90	270	460	660
Zone 4 - Martin Square Larkfield	-	90	240	410	590
Zone 4 - West Malling	-	310	940	1,600	2,290
Zone 5 - Snodland	-	-	-	10	10
Other Tonbridge & Malling	-	660	1,930	3,290	4,690
Total	-	**1,740**	**5,130**	**8,700**	**12,460**

Sources:

Table 10

Figures may not sum due to rounding

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