

Maidstone Economic Development Needs Study Stage Two

Final Report

Maidstone Borough Council

April 2020

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1.0 Introduction

1.1 Maidstone Borough Council ("the Council") commissioned Lichfields to undertake an integrated Economic Development Needs Study (EDNS) for the Borough. The purpose of the EDNS is to provide an up-to-date, robust and comprehensive evidence base for employment, retail, leisure and town centre needs within the Borough during the period to 2042.

1.2 The EDNS will be used by the Council to inform a review of existing planning policies and to develop new spatial strategies for economic development, having regard to the revised National Planning Policy Framework (NPPF). The methodology used in the study also draws on guidance contained in the Planning Practice Guidance (PPG).

1.3 The study follows a two-stage integrated approach as follows:

- 1 **Stage One - Taking Stock of the Current Position:** The provision of a baseline report demonstrating a holistic understanding of the current economic 'state' of the Borough and its centres, encompassing all employment, retail, leisure and main town centre uses, and commercial sectors. This also includes commercial viewpoints regarding the current local market and providing a narrative framing the key issues facing Maidstone's commercial sector; and
- 2 **Stage Two - Future Needs Assessment:** The completion of a substantive integrated EDNS in accordance with Government guidance and best practice for retail, leisure and employment needs. This will include the identification of potential policy approaches and spatial strategies for the forthcoming Maidstone Local Plan Review (LPR).

1.4 The baseline Stage One part of the study was completed in July 2019. This report sets out the results from Stage Two and should be read alongside the Stage One report.

Scope of Study

1.5 The NPPF (para. 11) 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. The EDNS assessment focuses on a range of employment, retail, leisure and town centre uses, broadly defined by the following use classes:

- **B1 Business:** offices (B1a), research & development (B1b) and light industrial (B1c).
- **B2 General Industrial:** typically comprising factory and manufacturing space.
- **B8 Storage and Distribution:** warehouses, wholesale and distribution.
- **A1-A5 Retail:** shops (A1), financial and business services (A2), food and drink (A3), drinking establishments (A4) and takeaways (A5).
- **D2 Assembly and Leisure:** cinemas, theatres, gyms, sports facilities, ten-pin bowling, bingo, trampolining and other leisure uses.

1.6 References to 'employment space' refer to all B class elements noted above. In addition, the term 'industrial space' is used to refer to both manufacturing (B1c/B2) and warehouse and distribution (B8) uses.

1.7 A summary of the study methodology is set out in the introduction to the Stage One report.

Structure of the report

1.8 The report is structured under the following sections:

- **Requirements for employment space (Chapter 2.0):** establishes the future need for Class B1, B2 and B8 floorspace in Maidstone Borough.
- **Requirements for main town centre uses (Chapter 3.0):** establishes the future need for Class A1 retail, A3 to A5 food/beverage and D2 leisure.
- **Needs of local businesses (Chapter 4.0):** reviews the findings of a business survey undertaken as part of the study to consider requirements for employment space in the future.
- **Review of employment land supply (Chapter 5.0):** a quantitative and qualitative assessment of the existing supply of employment land and sites across the Borough.
- **Strategy implications for employment uses (Chapter 6.0):** draws together forecasts of future employment space needs and estimates of pipeline employment land supply to identify overall demand/supply balance in quantitative and qualitative terms.
- **Strategy implications for town centre uses (Chapter 7.0):** analysis of the options for accommodating the future need for additional main town centre uses within existing premises and development opportunities.
- **Overarching conclusions** are provided in **Chapter 8.0.**

2.0 Requirements for Employment Space

2.1 This section considers future economic growth needs in Maidstone by drawing on several methodologies that are guided by the PPG. These scenarios are used to inform an assessment of future employment space needs for office and industrial (i.e. manufacturing and distribution) uses over the study period to 2042.

Methodology

2.2 The NPPF requires local authorities to “*set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to Local Industrial Strategies and other local policies for economic development and regeneration*” (para 81.a).

2.3 Within this context, a number of potential future economic scenarios have been developed in this study to provide a framework for considering future economic growth needs and B class employment space requirements in Maidstone up to 2042. In line with the PPG, these future scenarios draw upon:

- 1 Projections of employment growth in the main B class sectors (**labour demand**) derived from economic forecasts produced by Experian (dated September 2019);
- 2 Consideration of **past trends in completions of employment space** based on monitoring data collected by Maidstone Borough Council, and how these trends might change in the future.
- 3 Estimates of local **labour supply** growth based on demographic assumptions applied as part of the 2019 Maidstone Strategic Housing Market Assessment (SHMA) Update.

2.4 All of these approaches have limitations and consideration needs to be given as to how appropriate each is to the circumstances in Maidstone. Further, to be robust, the economic growth potential and likely demand for employment space in the Borough needs to be assessed under a variety of future scenarios, to reflect both lower and higher growth conditions that could arise in the future.

2.5 The approach to planning for economic development needs set out within the current Maidstone Borough Local Plan (adopted October 2017) was based on and guided by previous technical economic evidence prepared in 2014 which identified an Experian ‘base’ forecast as the preferred approach. From a consistency point of view this EDNS study considers the most up-to-date Experian economic forecasts as the starting point for future economic growth needs in Maidstone Borough over the new Local Plan period (i.e. scenario 1). The past trends and labour supply based scenarios (i.e. scenarios 2 and 3) are provided to sensitivity test the Experian baseline scenario and to help place it into context.

2.6 It should also be noted that the ultimate judgement as to the level of need that the local authority should plan for is not purely quantitative, and that there will be a number of qualitative factors to consider (discussed in other sections of the report). These factors will influence the employment space requirements that will need to be planned for and should be considered alongside the following modelled scenarios.

2.7 Outputs from these scenarios are presented for three different time periods as follows:

- 1 The new Local Plan period 2022-2037.
- 2 An extended Local Plan period 2022-2042 (to allow for potential delays in Plan adoption).
- 3 The period 2019-2037 for context.

A. Forecasts of Job Growth

- 2.8 Forecasts of employment growth in Maidstone were obtained from the September 2019 release of Experian's UK Local Market Forecasts which take account recent regional and national macroeconomic assumptions.
- 2.9 It is important to note that there are inherent limitations to the use of economic forecasts of this type, particularly within the context of recent economic and political changes. National macroeconomic assumptions are taken as the starting point and then modelled down to the regional and local levels by reference to the existing economic profile and sectoral composition of an area. Local level data is less comprehensive and reliable than at national and regional levels, which can affect how the modelling is calibrated. Similarly, top-down forecasts do not take account of specific local factors that might influence employment growth. However, forecasts are seen as a valuable input to indicate the broad scale and direction of future economic growth within different sectors, which helps assess the future space requirements of a local area.
- 2.10 Population projections are just one of several inputs used to produce economic forecasts both in terms of future changes in working-age population (i.e. which directly impacts on the demand for jobs) and total population (i.e. which create demand for consumption activities). It is important to note that population projections are frequently revised, as are assumptions around future working-age populations, economic activity rates and national changes to the pension age.

Scenario 1: Baseline Job Growth

- 2.11 Forecasts of job growth by sector reflect recent trends and are based on projections at the regional level and how sectors within Maidstone have fared relative to historic growth in the region. Experian forecasts are based on observed past trends. For example, where particular sectors have performed well compared with the regional average (i.e. South East England) the forecasts generally assume that these sectors will continue to drive growth within the Borough in the future. Experian's projections reflect the current economic climate and assume a slowdown in economic activity due to Brexit-related uncertainties. Further details are provided in Appendix 5.
- 2.12 The Experian employment projections indicate overall growth of 11,200 workforce jobs for Maidstone over the 15 year Local Plan period from 2022 to 2037, equivalent to around 747 jobs per year on average (Table 2.2). Table 2.1 shows the fastest growing sectors under this scenario, alongside those that are expected to see a decline in employment.
- 2.13 This shows that the health and social care sectors are expected to be key drivers of employment growth within the Borough over the plan period, while sectors forecast to incur the largest employment losses include utilities, manufacturing and accommodation and food services (Table 2.1).

Table 2.1 Fastest Growing and Declining Sectors in Maidstone

Experian Sector	Use Class	Employment Change			% Change		
		2022-37	2022-42	2019-37	2022-37	2022-42	2019-37
Health		+2,700	+3,800	+3,200	+29.7%	+41.3%	+37.2%
Residential Care & Social Work		+2,400	+3,300	+2,700	+43.6%	+59.6%	+51.9%
Admin & Support Services		+1,800	+2,500	+2,100	+15.7%	+21.8%	+18.8%
Education		+1,000	+1,300	+1,300	+15.6%	+20.9%	+21.3%
Specialised Construction Activities		+700	+1,000	+900	+12.3%	+16.9%	+16.4%
Professional Services		+500	+700	+500	+10.2%	+14.2%	+10.2%
Retail		+500	+700	+600	+7.4%	+10.5%	+9.0%
Utilities		-100	-200	-200	-16.7%	-38.7%	-28.6%
Manufacture of Transport Equipment		-100	-100	-100	-50.0%	-55.0%	-50.0%
Manufacture of Wood & Paper		-100	-100	-100	-50.0%	-55.0%	-50.0%
Accommodation & Food Services		-100	-200	-100	-2.0%	-4.7%	-2.0%

Source: Experian (September 2019) / Lichfields analysis

Key: GREEN = B class sector ORANGE = Part B class sector RED = Non B class sector

Note: As Experian projections cover the period to 2039 only, the compound annual growth rate (CAGR) for each sector between 2019 and 2039 has been applied to extend forecasts to an end year of 2042.

2.14

Tables 2.2/2.3/2.4 and Figure 2.1 show the implied employment change by office and industrial uses as well as total employment change for each time period. This includes an allowance for jobs in other non B class sectors that generally use office or industrial space.

Table 2.2 Forecast Employment Change in Maidstone, 2022-2037

Use	Number of Workforce Jobs		Change (2022-2037)
	2022	2037	
Office (B1a/B1b) Jobs	16,660	18,870	2,210
Industrial (B1c/B2) Jobs	10,845	11,345	500
Warehouse (B8) Jobs	7,590	8,085	500
Total B Class Jobs	35,095	38,305	3,210
Total Workforce Jobs	92,500	103,700	11,200

Source: Experian (September 2019) / Lichfields analysis (totals rounded)

Table 2.3 Forecast Employment Change in Maidstone, 2022-2042

Use	Number of Workforce Jobs		Change (2022-2042)
	2022	2042	
Office (B1a/B1b) Jobs	16,660	19,680	3,020
Industrial (B1c/B2) Jobs	10,845	11,655	810
Warehouse (B8) Jobs	7,590	8,280	690
Total B Class Jobs	35,095	39,615	4,520
Total Workforce Jobs	92,500	108,020	15,520

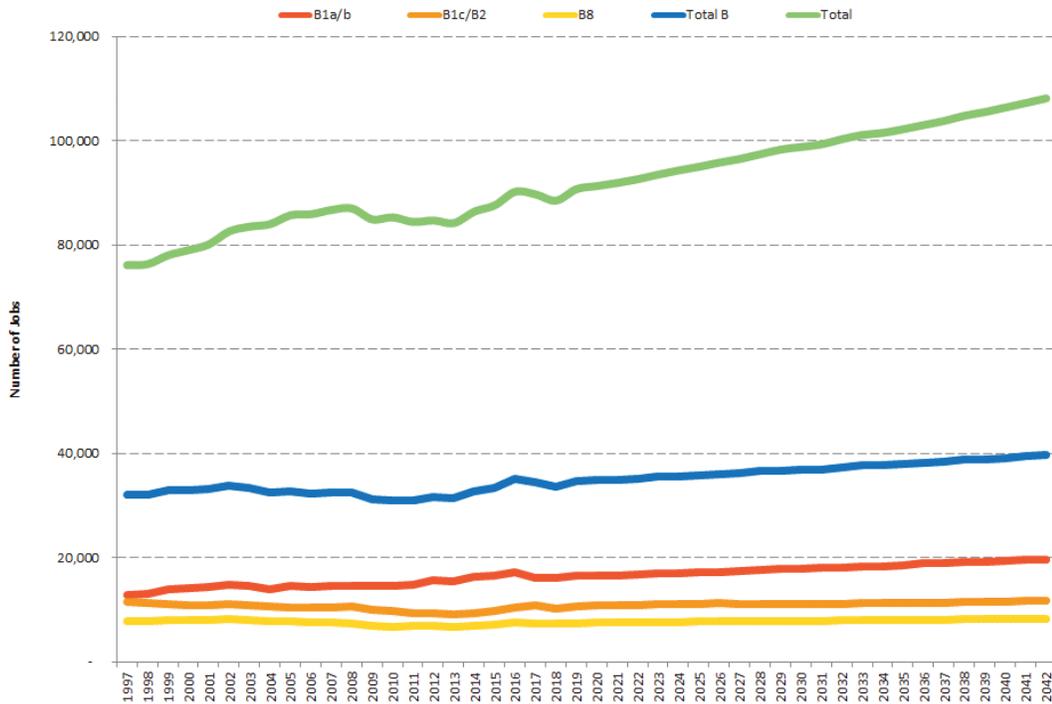
Source: Experian (September 2019) / Lichfields analysis (totals rounded)

Table 2.4 Forecast Employment Change in Maidstone, 2019-2037

Use	Number of Workforce Jobs		Change (2019-2037)
	2019	2037	
Office (B1a/B1b) Jobs	16,510	18,870	2,360
Industrial (B1c/B2) Jobs	10,670	11,345	675
Warehouse (B8) Jobs	7,415	8,085	670
Total B Class Jobs	34,590	38,300	3,710
Total Workforce Jobs	90,600	103,700	13,100

Source: Experian (September 2019) / Lichfields analysis

Figure 2.1 Forecast Employment Growth in Maidstone to 2042



Source: Experian (September 2019) / Lichfields analysis

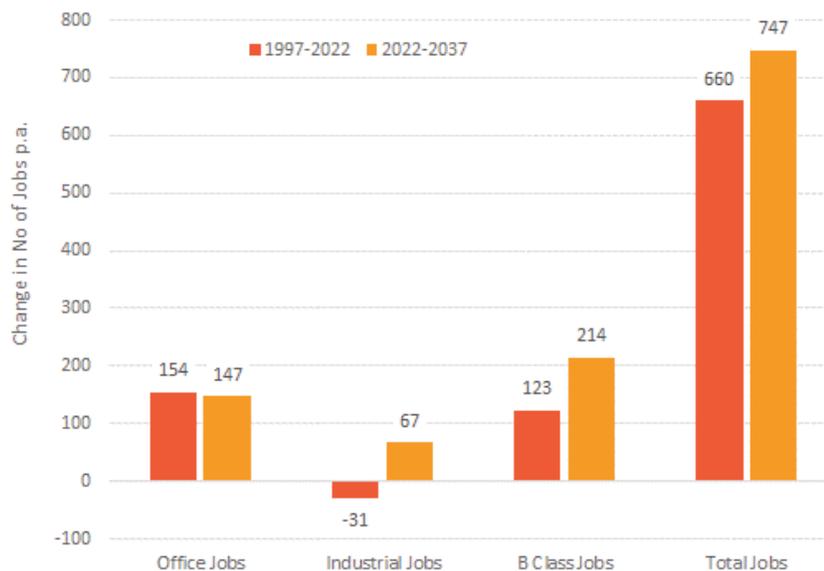
Note: As Experian projections cover the period to 2039 only, the compound annual growth rate (CAGR) for each sector between 2019 and 2039 has been applied to extend forecasts to an end year of 2042

2.15 These figures indicate a strong level of net job growth in B class sectors of 3,210 between 2022 and 2037. The majority of this job growth is expected to be driven by office based jobs, while industrial (B1c/B2 and B8) job growth is expected to be more modest.

2.16 Within the context of total job growth of 11,200 for the Borough over the 15 year plan period, this suggests that ‘other’ sectors are expected to contribute most to job growth, most notably the social care and health sectors (Table 2.1). These key growth sectors will also require additional floorspace to accommodate an increase in employment over the period to 2037. Whilst some of this activity may require conventional office space, as noted previously the spatial implications of this growth are considered using different methodologies and other forms of technical evidence which fall outside the scope of this EDNS.

- 2.17 The projected net increase of 2,210 office jobs, which equates to an average of 147 per annum, is slightly lower than the average annual office-based job growth of 154 recorded for the period 1997 to 2022 in Maidstone (Figure 2.2 – note that the 2022 figure represents a forecast).
- 2.18 The projected increase in total industrial jobs, equivalent to 67 per annum, provides a more optimistic forecast than the average loss of 31 jobs per annum between 1997 and 2022 indicated by Experian trend/forecast data.
- 2.19 On the basis of past performance, the baseline job growth scenario overall could be regarded as an optimistic estimate of employment growth.

Figure 2.2 Annual Job Change Implied by the Experian Forecast



Source: Experian (September 2019) / Lichfields analysis

Floorspace Requirements

- 2.20 The B class part of these employment growth forecasts have been converted to future employment space requirements by applying the latest published density figures for employment space, which take account of recent trends in occupancy for the different B class uses. To estimate space requirements, the following average GEA ratios have been applied to job forecasts:
- **Offices:** 1 workforce job per 12.5 sqm for general office space;
 - **Industrial:** 1 workforce job per 45 sqm as an average across B1c and B2 uses; and
 - **Warehousing:** 1 workforce job per 65 sqm for general, smaller scale warehousing (assumed to account for 80% of warehousing stock in Maidstone) and 1 workforce job per 80 sqm for large scale, lower density units (assumed to account for 20% of total stock).
- 2.21 These assumptions are based on latest Homes & Communities Agency (HCA) guidance on job density ratios produced in 2015¹ and converted by Lichfields to Gross External Area (GEA)

¹ Homes and Communities Agency, Employment Density Guide 3rd Edition, November 2015. Average job density ratios are presented inconsistently within the HCA Guide, in terms of Net Internal Area (NIA), Gross Internal Area (GIA) and Gross External Area (GEA) depending on the use class.

equivalent ratios for consistency across all uses. The guidance takes account of recent trends in terms of changing utilisation of employment space, with the key change being the more efficient use of office floorspace due to the higher frequency of flexible working and hot-desking. This has resulted in a reduction in the amount of floorspace per office worker assumed compared to earlier guidance.

- 2.22 An allowance of 10% is added to all positive floorspace requirements to reflect normal levels of market vacancy in employment space.

Table 2.5 Net Employment Space Requirements in Maidstone (Baseline Job Growth)

Use	Floorspace (GEA sqm)		
	2022-2037	2022-2042	2019-2037
Offices (B1a/B1b)	30,390	41,510	32,490
Manufacturing (B1c/B2)	24,670	39,945	33,295
Distribution (B8)	37,265	51,705	50,280
Total B Class	92,325	133,160	116,065

Source: Lichfields analysis

Note: Totals rounded

- 2.23 As shown in Table 2.5, the resulting net B class floorspace requirement is positive, driven by increases across all types of B use class floorspace.

B. Past Development Rates

- 2.24 Past development rates reflect market demand and actual development patterns, so can provide a reasonable basis for informing future space needs. Completions over a period of ten years or more should even out demand fluctuations over a business cycle, and normally provide a reasonable basis for estimating future needs provided land supply has not been unduly constrained. Whereas job forecasts show growth in net terms, past trend-based assessments take account development that offsets the redevelopment of employment sites, and from the recycling of sites.

Scenario 2: Past Development Rates

- 2.25 Monitoring data on past completions of B class uses between 2010/11 and 2017/18 was provided by the Council. During this period, average annual net completions for B class uses in Maidstone amounted to -13,500 sqm (Table 2.6).
- 2.26 Gross completions were considerably higher, at an average of 13,568 sqm, indicating that a large amount of employment floorspace has been lost in order to result in negative net completion rates (further detail provided in Stage One EDNS report).

Table 2.6 Annual Completion Rates of Employment Space in Maidstone, 2010 to 2018

Use	Net Annual Completions (sqm)	Gross Annual Completions (sqm)
Office (B1a/B1b)	-9,864	1,916
Manufacturing (B1c/B2)	-2,080	5,512
Distribution (B8)	-1,556	6,139
Total	-13,500	13,568

Source: Maidstone Borough Council / Lichfields analysis

Note: Totals rounded

- 2.27 One view of future growth in Maidstone could simply assume that these past development trends carry on in the future at the long term average. Over the 15 year Local Plan period, this

would equate to an overall reduction of 202,500 sqm of employment space, driven to a large extent by ongoing office floorspace losses.

- 2.28 These employment requirements, by virtue of producing a negative overall requirement, are significantly lower than that estimated using job based forecasts (Table 2.7).

Table 2.7 Net Employment Space Requirements Based on Past Completion Trends

Use	Assumed Net Annual Floorspace Change (sqm)	Net Floorspace Requirements (GEA sqm)		
		2022-2037	2022-2042	2019-2037
Office (B1a/B1b)	-9,864	-147,960	-197,280	-177,552
Manufacturing (B1c/B2)	-2,080	-31,200	-41,600	-37,440
Distribution (B8)	-1,556	-23,340	-31,120	-28,008
Total	-13,500	-202,500	-270,000	-243,000

Source: Maidstone Borough Council / Lichfields analysis

Note: Totals rounded

- 2.29 Using standard ratios of jobs to floorspace for the different B class uses (as outlined above), it is possible to estimate that this decline in floorspace could lead to a reduction of 12,875 B class jobs in the Borough between 2022 and 2037 under this scenario. This is equivalent to a reduction of around 858 B class jobs each year over the course of the plan period.

- 2.30 Some of the floorspace that has been lost from the Borough's stock in recent years has been poor quality, redundant space no longer required by the market, and the introduction of office to residential PDR has accelerated and incentivised this trend since 2013. It is therefore possible that the pace of employment space losses reduces in future, particularly if effective Local Plan policies are in place to support the protection of the Borough's business accommodation.

C. Future Labour Supply

- 2.31 It is also important to take account how many jobs, and hence how much employment space, would be necessary to broadly match forecast growth of the resident workforce in Maidstone Borough. In contrast to the labour demand approach, this approach focuses on the future supply of labour rather than the demand for labour. It then estimates the amount of new jobs needed to match the future supply of working-age population, and how much employment space would be needed to accommodate the B class component of these jobs.

Scenario 3: Baseline Labour Supply (Standard Method)

- 2.32 A labour supply based scenario has been considered based on population projections and other demographic assumptions that have been used to inform the Maidstone Strategic Housing Market Assessment Update (2019). The SHMA Update provides an assessment of the growth in resident workforce which might be supported by the local housing need in Maidstone and what this means for potential total labour supply, after taking account of commuting, unemployment rates and double jobbing. The SHMA projections indicate a growing population in overall terms within Maidstone Borough, and that a large proportion of this population growth is expected to be amongst working age groups.
- 2.33 It should be noted that this scenario assumes that local housing needs as identified by the SHMA are met in full over the Plan period; any deviation from this assumption may have a knock-on impact in terms of labour supply growth and associated employment space requirements under this scenario.

- 2.34 On the basis of these assumptions, Table 2.8 below shows how many additional jobs (or workplace labour supply) might be supported by population growth under the Standard Method (of calculating housing need). This population growth is associated with a local housing need for 1,214 dwellings per annum, equivalent to 18,210 dwellings between 2022-37.

Table 2.8 Baseline Labour Supply and Job Requirements

Indicator	Total Change	
	2022-2037	2019-2037
Workplace Labour Supply (Total Jobs)	21,141	25,369
Office Jobs (B1a/B1b)	3,829	4,595
Manufacturing Jobs (B1c/B2)	1,667	2,000
Distribution Jobs (B8)	1,350	1,620
All B Class Jobs	6,846	8,215

Source: Maidstone SHMA Update 2019 / Lichfields analysis Note: Totals rounded

Note: SHMA figures relate to the study period 2019-37 so have been pro-rated to cover the 15-year Local Plan period 2022-37

Note: SHMA figures currently only extend to 2037 so no labour supply scenario is provided for the extended Local Plan period 2022-2042

- 2.35 This shows that the demographic need would support jobs growth of 21,141 in the Borough over the 15 year period to 2037². The proportion of jobs within B class sectors assumes the same shares as the Experian baseline forecast analysis (as presented in Scenario 1).
- 2.36 These job numbers can then be translated into estimated requirements for B class employment space by applying the same standard employment densities used in the job growth based approach and adding a 10% vacancy allowance (Table 2.9).

Table 2.9 Net Employment Floorspace Required from Labour Supply Growth

Use	Floorspace (GEA sqm)	
	2022-2037	2019-2037
Offices (B1a/B1b)	52,650	63,180
Manufacturing (B1c/B2)	82,515	99,000
Distribution (B8)	100,980	121,175
Total B Class	236,145	283,355

Source: Lichfields analysis, based on Maidstone SHMA Update 2019

- 2.37 This baseline labour supply based estimate produces a positive space requirement that significantly exceeds both the labour demand and past take up based approaches.

² SHMA outputs on jobs supported by Standard Method cover the 18-year period 2019-37, so have been pro-rated by Lichfields to cover the 15 year study period for the EDNS (2022-37)

Summary of Net Employment Space Requirements

2.38

Drawing together the results from each of the future growth scenarios for Maidstone, the net B class employment floorspace requirements for the Borough reflect a range of potential scenarios, as summarised below.

Table 2.10 Net Floorspace Requirements by Scenario 2022-37 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	30,390	-147,960	52,650
Manufacturing (B1c/B2)	24,670	-31,200	82,515
Distribution (B8)	37,265	-23,340	100,980
All B Uses	92,325	-202,500	236,145

Source: Lichfields analysis (totals rounded)

Table 2.11 Net Floorspace Requirements by Scenario 2022-42 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	41,510	-197,280	n/a
Manufacturing (B1c/B2)	39,945	-41,600	n/a
Distribution (B8)	51,705	-31,120	n/a
All B Uses	133,160	-270,000	n/a

Source: Lichfields analysis (totals rounded)

Table 2.12 Net Floorspace Requirements by Scenario 2019-37 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	32,490	-177,552	63,180
Manufacturing (B1c/B2)	33,295	-37,440	99,000
Distribution (B8)	50,280	-28,008	121,175
All B Uses	116,065	-243,000	283,355

Source: Lichfields analysis (totals rounded)

2.39

The net B class employment floorspace requirements represent the minimum recommended amount of floorspace that should be planned for in the Borough over the new Local Plan period.

Planning Requirement

2.40

While the net employment space requirements presented above represent the minimum recommended quantum of employment space to plan for in Maidstone over the study period, the Council will need to take a view on the extent to which additional space should be planned for over and above the net requirements, in order to allow for such factors as delays in development sites coming forward, an allowance for replacement of ongoing losses of employment space during the Local Plan period, and other relevant factors in the local market.

2.41

Whilst no specific guidance or recommendations are provided by the PPG, the former South East England Partnership Board (SEEPB) guidance on employment land assessments recommended an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically up to about two years. This is equivalent to around 10%

of the study period for the EDNS, and is applied to positive net space requirements, as summarised in Tables 2.13 to 2.15.

Table 2.13 Gross Floorspace Requirements by Scenario 2022-37 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	33,430	-147,960	57,915
Manufacturing (B1c/B2)	27,135	-31,200	90,765
Distribution (B8)	40,990	-23,340	111,080
All B Uses	101,555	-202,500	259,760

Source: Lichfields analysis (totals rounded)

Table 2.14 Gross Floorspace Requirements by Scenario 2022-42 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	45,660	-197,280	n/a
Manufacturing (B1c/B2)	43,940	-41,600	n/a
Distribution (B8)	56,875	-31,120	n/a
All B Uses	146,475	-270,000	n/a

Source: Lichfields analysis (totals rounded)

Table 2.15 Gross Floorspace Requirements by Scenario 2019-37 (GEA sqm)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	35,740	-177,552	69,500
Manufacturing (B1c/B2)	36,625	-37,440	108,900
Distribution (B8)	55,310	-28,008	133,290
All B Uses	127,675	-243,000	311,690

Source: Lichfields analysis (totals rounded)

Land Requirement

2.42 The final step, for all scenarios, is to translate floorspace into land requirements for both office (B1a/B1b) and industrial (B1c/B2/B8) uses. This translation takes account of the total land/site area typically needed to accommodate industrial and office uses, once both premises and associated car parking, space for lorry turning, landscaping etc have all been factored in.

2.43 This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates presented above using the following assumptions and local adjustment factors to reflect the pattern of development in Maidstone Borough:

- **Industrial (B1c/B2/B8)**: a plot ratio of 0.4 is applied so that a 1.0 ha site would be needed to accommodate a footprint of 4,000sq.m of employment floorspace; and
- **Offices (B1a/B1b)**: assumed that 30% of new floorspace would be in lower density developments with a plot ratio of 0.4, with 70% in higher density urban/town centre locations at a plot ratio of 2.0.

2.44 These conversions provide an indication of approximately how much land might be needed to accommodate the scale of floorspace requirement arising under each growth scenario. Density

of development inevitably varies by individual scheme and by location, so depending on where floorspace is allocated, the land take (ha) may vary even if floorspace (sqm) does not.

2.45

The tables below provide an illustration of indicative 'gross' employment land requirements or 'planning requirements' by scenario after applying the 10% buffer/margin and translating floorspace requirements to land.

Table 2.16 Planning Requirements by Scenario 2022-37 (ha)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	3.7	-16.3	6.3
Manufacturing (B1c/B2)	6.8	-7.8	22.7
Distribution (B8)	10.2	-5.8	27.8
All B Uses	20.7	-29.9	56.8

Source: Lichfields analysis

Table 2.17 Planning Requirements by Scenario 2022-42 (ha)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	5.0	-21.7	n/a
Manufacturing (B1c/B2)	11.0	-10.4	n/a
Distribution (B8)	14.2	-7.8	n/a
All B Uses	30.2	-39.9	n/a

Source: Lichfields analysis

Table 2.18 Planning Requirements by Scenario 2019-37 (ha)

Use	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Offices (B1a/B1b)	3.9	-19.5	7.6
Manufacturing (B1c/B2)	9.2	-9.4	27.2
Distribution (B8)	13.8	-7.0	33.3
All B Uses	26.9	-35.9	68.1

Source: Lichfields analysis

Synthesis and Conclusions

2.46

In interpreting the outputs of this section, regard should be had to PPG guidance which states that Local Authorities should develop an idea of future economic needs based on a range of data and forecasts of quantitative and qualitative need. It is also important to recognise that there are inevitable uncertainties and limitations associated with modelling assumptions under the future growth scenarios considered. For example, there are some inherent limitations to the use of local level economic forecasts, particularly in the context of significant recent changes and uncertainty in the economy. Economic forecasts are regularly updated and the resulting employment outputs will change over the plan period.

2.47

Three different scenarios of future employment space requirements have been considered based on a range of lower and higher growth conditions that could arise in the future. Both the baseline job growth and labour supply scenarios indicate a positive overall requirement for B class space over the 15 year period to 2037. The past take-up scenario implies a negative

- requirement for B class space as it assumes that past trends of employment space decline continue unchanged in the Borough in future.
- 2.48 For the new Local Plan period 2022-37, the overall planning requirements that have been estimated range from -29.9 ha (under the past take-up scenario) to +56.8 ha (under the labour supply growth scenario). The majority of this spatial requirement relates to industrial and distribution uses, reflecting the lower job densities associated with these types of operations (compared with office uses which tend to operate at higher densities).
- 2.49 The economic forecasts provided by Experian represent a 'business as usual' view of Maidstone's economic growth prospects and draw on the latest macro-economic outlook and assumptions, which are clearly highly sensitive to wider macro factors such as Brexit. The **baseline Experian scenario (scenario 1)** implies that there will be steady job growth across the B class sectors over the study period, and that the pace of job growth will accelerate slightly in future compared with recent trends in Maidstone Borough.
- 2.50 The current Maidstone Borough Local Plan (adopted October 2017) adopts previously procured Experian baseline forecasts as the preferred approach to planning for economic growth in the Borough, so the latest forecasts (dated September 2019) provide a consistent basis for continuing a similar growth strategy over the course of the new Local Plan period (albeit reflecting a more up-to-date and relatively uncertain macro-economic outlook).
- 2.51 The **labour supply based approach (scenario 3)** generates the highest job growth projections and associated employment space requirements. It is based on population growth assumptions associated with the Standard Method (as applied as part of the Maidstone SHMA) which imply a much higher scale of total and B class job growth in the Borough to 2037, and as a result, a higher employment floorspace and land requirement. Further information about population and demographic assumptions that feed into the Standard Method is set out in the SHMA Update. This scenario suggests that projected population growth could be the most significant driver of economic growth in Maidstone Borough over the plan period, reflecting Maidstone's role as a key population centre and strong expected working age population growth. This scenario also assumes that current commuting patterns³ to and from Maidstone Borough remain the same in future, although in reality these patterns could change as a result of factors including increasingly flexible working (such as homeworking) and the introduction of new rail (Thameslink) services which would open up connections from Maidstone to a wider 'innovation corridor'.
- 2.52 The **final scenario (scenario 2)** assumes that past take-up rates of B class space in Maidstone continue unchanged in future; in doing so, it results in a negative overall B class floorspace requirement and is therefore not considered to provide a robust scenario for positively planning for future employment space needs.
- 2.53 Within the context of the NPPF requirement to plan positively for growth, **it is recommended that the Council consider planning to accommodate at least the labour demand (job growth) based requirement (scenario 1)** to ensure that business growth potential is not constrained by lack of spatial capacity in future.
- 2.54 Within the context of wider Local Plan growth objectives and strategy, the labour supply scenario (based on the Standard Method approach to calculating local housing need) provides a comparatively more aspirational growth trajectory that seeks to match potential population growth with a sustainable balance of employment opportunities (or at least, the spatial capacity for these jobs). This higher growth scenario would appear to align well with and support the

³ As at time of 2011 Census

Council's ambitions to capitalise on the Borough's assets and the opportunities to strengthen the economy and create the right conditions for economic growth, as set out in the Maidstone Economic Development Strategy 2015 – 2031.

3.0 Requirement for Main Town Centre Uses

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

3.2 National trends that are likely to influence the need for main town centre uses in Maidstone Borough were outlined in Section 4.0 of the Stage One report. The Stage One report included a description of trends e.g. expenditure growth, home shopping and changes in market conditions. The Stage One report also included an analysis of the shopping and leisure hierarchy in the sub-region. These Stage One findings feed into the need assessment in this Stage Two section.

Study area population and expenditure

3.3 The study area is sub-divided into six zones as shown in Appendix 1. The study area population for 2019 and projections to 2042 are set out in Table 1 in Appendix 3. Population data has been obtained from Experian. Population within the study area is 576,026 in 2019, which is expected to increase by +118,499 people by 2042 (+20.6% or +0.8% per annum). The Retail Capacity Study 2013 projected population would grow at a similar rate (+0.85% between 2016 and 2031).

3.4 The level of available expenditure to support floorspace is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2017 have been obtained. This expenditure information is based on National Statistics and Experian is a widely adopted and accepted source of information at planning hearings and appeals. Pitney Bowes is another source of expenditure that provides similar projections when compared with Experian. The Retail Capacity Study 2013 was based on Pitney Bowes base year expenditure figures for 2012. Most town centre and retail evidence base studies are underpinned by either Experian or Pitney Bowes expenditure data and projections.

3.5 The Retail Capacity Study 2013 projected that convenience goods expenditure per capita would increase by 1.2% between 2012 and 2016. Actual growth during this period was slightly lower at 0.8%. The Retail Capacity Study 2013 projected that comparison goods expenditure per capita would increase by 21.3% between 2012 and 2016. Actual growth during this period was again slightly lower at 18.7%.

3.6 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 17) has been used to forecast expenditure within the study area. Experian's EBS growth forecast rates for 2017 to 2020 reflect the current economic circumstances, recent past growth rates and provide an appropriate growth rate for the short term, as follows:

- convenience goods: 1% for 2017 to 2018, -0.4% for 2018 to 2019 and 0% from 2019 to 2020;
- comparison goods: 3.4% for 2017 to 2018, 3.9% for 2018 to 2019 and 3.0% from 2019 to 2020; and
- leisure: -1.5% for 2017 to 2018, -0.5% for 2018 to 2019 and 0.9% from 2019 to 2020.

3.7 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer-term (after 2021) growth average forecasts have been adopted, as follows:

- 0.1% per annum for convenience goods;
- 3.2% per annum growth for comparison goods; and
- 1.2% per annum for leisure.

3.8 Special Forms of Trading (SFT) or non-store activity includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. Experian provides adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2017 were 3.5% of convenience goods expenditure and 15.6% of comparison goods expenditure. The projections provided by Experian suggest that these percentages could increase to 6.8% and 25.7% by 2037 respectively. These figures have been adopted in this updated assessment.

3.9 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2042. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3 and food/beverage spending is shown in Table 2 in Appendix 4.

Total available expenditure in the study area

3.10 As a consequence of growth in population and per capita spending (excluding SFT), retail and food and beverage spending within the study area is forecast to increase from 2019 to 2037 as follows:

- convenience goods £1,311 million to £1,514 million (+15% or +0.8% per annum);
- comparison goods £2,070 million to £3,714 million (+79% or +3.3% per annum);
- food/beverage £682 million to £967 million (+41% or +1.96% per annum).

3.11 All monetary values expressed at 2017 prices and the figures relate to real growth and exclude inflation.

3.12 The convenience goods expenditure growth (+15%) is fuelled by population growth and expenditure per capita growth will be offset by growth in SFT sales. Over three quarters of the growth in comparison goods expenditure (+79%) is fuelled by growth in expenditure per capita. The annual growth rates are similar to the rates adopted in the 2013 Retail Capacity Study for the period 2016 to 2031.

3.13 Although the expenditure projections exclude inflation, it should be noted that not all of the expenditure growth will result in an increase in demand for sales floorspace. Some of the growth will be due to customers purchasing higher value goods rather than more goods. As a result, the sales density of existing retail sales floorspace is expected to grow and will absorb a significant proportion of the projected expenditure growth. For example, Experian projects comparison goods expenditure per capita will increase by between 3.0% to 3.2% per annum in the future, but most of this growth will be absorbed by growth in sales efficiency. All the growth in convenience goods expenditure is expected to be absorbed by the growth in SFT, and therefore only population growth will result in an increase in demand for sales floorspace.

Base year trading 2019

3.14 The results of the household shopper survey undertaken by NEMS in August 2019 were used to calculate base year market shares. The 2019 base year market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and 3 respectively. Market shares for food and beverage spending is shown in Table 4 in Appendix 4.

Total expenditure attracted to Maidstone Borough

3.15 The level of expenditure attracted to shops/facilities in Maidstone Borough at 2019 is estimated to be:

- convenience goods £352.86 million;
- comparison goods £585.08 million;
- food/beverage £241.48 million.

- 3.16 The convenience goods benchmark turnover of existing large food stores within Maidstone Borough is £251.33 million (Table 10, Appendix 2), compared with total available expenditure of £352.86 million. Even allowing for trade taken by small convenience good shops within the Borough, these figures suggest that collectively convenience retail facilities in Maidstone Borough are trading healthily in 2019.
- 3.17 Maidstone town centre and out of centre stores in the urban area are estimated to attract £562.55 million of comparison good expenditure at 2019. Comparison goods sales floorspace within Maidstone urban area is estimated to be 76,611 sq.m net, as shown in Table 11 in Appendix 3. These figures suggest an average sales density of £7,343 per sq.m net. Based on Lichfields' recent experience across the country, average sales densities for comparison floorspace can vary significantly. Average sales densities above £7,000 per sq.m net are usually only achieved by relatively large shopping centres. In smaller centres, usually where the property costs are much lower, these high sales densities are not normally achieved. Overall, trading levels are satisfactory in Maidstone Borough, but an allowance should be made for existing floorspace to increase its sales density in real terms in the future.
- 3.18 Food and beverage facilities in the Borough are estimated to attract £241.58 million. Lichfields' analysis of the town centre and village centres has identified 190 food and beverage outlets (Class A3 to A5) as shown in Table 10 in Appendix 4. Restaurant/bars would be expected to achieve a turnover of between £0.5 million to £1 million on average. Food and beverage facilities in Maidstone Borough appear to be trading healthily.

Class A1 to A5 floorspace capacity

- 3.19 It is appropriate and realistic to plan to maintain the Borough's market shares over the study period. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is accounted for in projecting available expenditure, this will have the effect of reducing the actual requirement for additional floorspace. Planned commitments if implemented will change shopping patterns in the future.
- 3.20 Major commitments in surrounding authorities (e.g. development at Bluewater, Medway and Ashford) are likely to reduce Maidstone's market share of expenditure, but conversely development within Maidstone could help to counter-balance this reduction in market share. At present the only major commitment identified within Maidstone Borough is the proposed Marks & Spencer store at Eclipse Park. The retail capacity projections assume this store will be implemented and will help to maintain Maidstone's market share of expenditure. The floorspace projections assume constant market shares.
- 3.21 Available expenditure has been projected forward to 2022, 2027, 2032, 2037 and 2042, and is summarised in Table 11 in Appendix 2 for convenience goods; Table 11 for comparison goods in Appendix 3; and Table 11 in Appendix 4 for food/beverage expenditure.
- 3.22 The amount of surplus expenditure is calculated by subtracting the turnover of existing and committed floorspace from available expenditure. This surplus expenditure may be available for further new development. The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12 in Appendix 2 for convenience goods; Table 12 for comparison goods in Appendix 3; and Table 12 in Appendix 4 for food/beverage. The results are summarised in Table 3.1 below.

- 3.23 As indicated earlier, the convenience goods expenditure growth is fuelled by population increases, and the floorspace projections shown in Table 3.1 will be required to serve new residential developments. However less than a quarter of the comparison goods floorspace projections will be fuelled by population growth, and around 40% of the food/beverage projections.
- 3.24 The floorspace projections in Table 3.1 are not directly comparable with the figures within the 2013 Retail Capacity Study, because they cover a different period (2019 to 2042 rather than 2012 to 2031) and are quoted as gross rather than net sales. If factored up to gross floorspace (70% net to gross) the 2013 study suggested convenience goods floorspace of 7,467 sq.m gross (GEA), marginally higher than the revised/rolled forward projection of 5,271 sq.m gross (GEA).

Table 3.1 Retail and food/beverage floorspace capacity (sq.m gross GEA - cumulative)

	2022	2027	2032	2037	2042
A1 Convenience goods					
Maidstone urban	0	1,267	3,008	4,673	6,397
Other Maidstone Borough	0	620	1,011	1,384	1,771
Sub-total	0	1,887	4,019	6,057	8,168
A1 Comparison goods					
Maidstone urban	0	0	0	730	5,643
Other Maidstone Borough	0	0	107	290	485
Sub-total	0	0	107	1,020	6,128
A3 – A5 Food/beverage					
Maidstone urban	1,014	3,420	5,495	7,444	12,681
Other Maidstone Borough	272	782	1,217	1,625	2,731
Sub-total	1,286	4,202	6,712	9,069	15,412
Grand Total	1,286	6,089	10,838	16,146	29,708

Sources: Table 13 in Appendix 2, Table 13 in Appendix 3 and Table 13 in Appendix 4.

- 3.25 Again, if factored up to gross floorspace (75% net to gross) the 2013 study suggested comparison goods floorspace of 32,669 sq.m gross (GEA), which is much higher than the revised/rolled forward projection of 6,128 sq.m gross (GEA), due to higher projected expenditure growth and lower growth in sales densities between 2012 to 2031 when compared with 2019 to 2042.
- 3.26 The 2013 Retail Capacity Study did not quantify the projected floorspace capacity for Class A3 to A5 food/beverage floorspace.
- 3.27 The combined floorspace projection is 10,838 sq.m (GEA) at 2032 increasing to 16,146 sq.m (GEA) by 2037 and 29,708 sq.m (GEA) in 2042. This growth is primarily fuelled by population growth up to 2042.

Qualitative need for retail facilities

- 3.28 The analysis above quantifies the theoretical capacity to support new retail and food/beverage floorspace within Maidstone Borough, based on the population and expenditure projections. The qualitative need for new facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:
- 1 the diversity of uses and deficiencies or 'gaps' in existing provision;
 - 2 consumer choice and competition;
 - 3 levels of expenditure retention and leakage;
 - 4 overtrading, congestion and overcrowding of existing stores;

- 5 location specific needs such as underserved markets; and
- 6 the quality of existing provision.

Existing retail provision in Maidstone Borough

3.29 As part of the study, an audit of the existing retail and service provision was undertaken within the main settlements. These assessments are set out in Section 8 of the EDNS Stage One Report. A summary of existing retail provision is provided in Table 3.2 below. Maidstone is the largest shopping destination within the Borough with a combined retail sales floorspace of nearly 99,000 sq.m net. The town centre has a good range and choice of both comparison and convenience goods shopping. Headcorn is the next largest destination with 20 retail units (1,086 sq.m net). The other centres are much smaller, with only a limited number of retail units.

Table 3.2 Existing convenience and comparison floorspace in Maidstone Borough

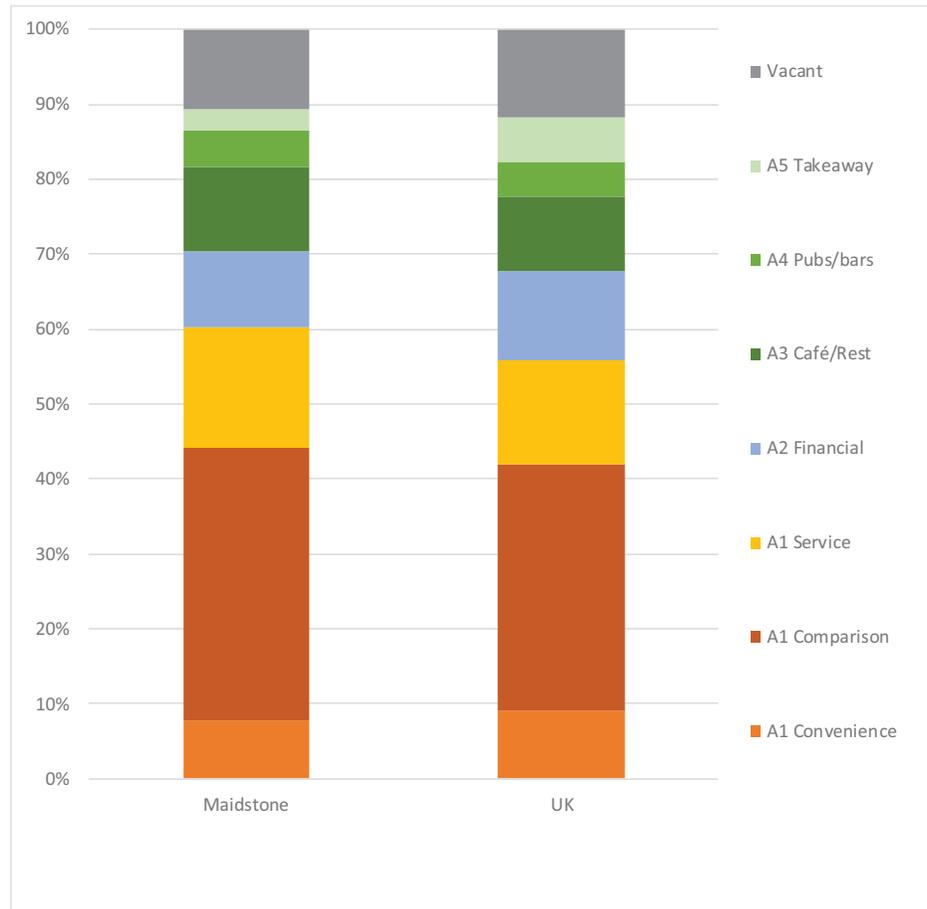
Centre	No. of Class A1 retail units	Convenience floorspace sq.m net	Comparison floorspace sq.m net	Total retail floorspace sq.m net
Maidstone town centre	234	7,639	48,004	55,643
Maidstone out-of-centre food stores	15	14,477	3,191	17,668
Maidstone out of centre comparison	11	0	25,417	25,417
Maidstone urban area sub-total	260	22,116	76,612	98,728
Harrietsham	3	375	28	403
Headcorn	20	421	665	1,086
Lenham	11	513	147	660
Marden	8	160	98	258
Staplehurst	11	310	91	401
Boughton Monchelsea	2	60	28	88
Coxheath	8	360	105	465
Eyehorne St. Hollingbourne	1	50	-	50
Sutton Valence	2	60	25	85
Yalding	3	80	25	105
Total	329	24,505	77,824	102,329

Source: Experian Goad for Maidstone – October 2017, updated by Lichfields February 2019 and Lichfields site visit February 2019

3.30 Figure 3.1 shows the proportional mix of Class A within Maidstone town centre compared with Goad Plan national average, based on recent land use surveys for over 1,250 town centres across the UK. In line with its role at the top of the shopping hierarchy in the Borough, Maidstone has a relatively high proportion of Class A1 comparison units, whilst the proportion of Class A1 convenience uses is slightly below the national average. The convenience offer includes a selection of large food stores Sainsbury's, Iceland, Co-operative and Tesco. The vacancy rate (10.6%) is slightly below the national average of 11.8%.

3.31 A more detailed health check/audit of the centres is contained within Section 8 of the EDNS Stage One Report.

Figure 3.1 Mix of Class A uses in Maidstone Town Centre



Source: Experian Goad for Maidstone town centre

Convenience goods shopping

- 3.32 Most households undertake two types of food and grocery shopping trips i.e. a weekly shop (or less frequent main or bulk shopping trip) and more regular top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips and large supermarkets or superstores are the usual destinations. Accessibility and convenience tend to be more important for top up shopping trips.
- 3.33 Maidstone urban area is in Zone 1. The proportion of Class A1 convenience uses in Maidstone is slightly below the national average. Within the town centre, there is reasonable convenience offer, comprising a Co-operative (450 sq.m), Tesco Express (350 sq.m) and Iceland (960 sq.m). There is also a Sainsbury's (3,700 sq.m) within the town centre boundary. These larger stores are supported by newsagents, bakers, butchers, sandwich bars, off licences and other small convenience stores. The suburbs of Maidstone have a good choice of food stores including two Aldi and two Lidl discount stores, Morrisons and Tesco superstores and a large Waitrose store. Most of the main food store operators are represented, as listed in Table 11 in Appendix 2.
- 3.34 In terms of convenience goods expenditure retention, Maidstone retains over 83% of expenditure in Zone 1. The 17% leakage to destinations outside the Borough is mostly attracted to food stores in Aylesford. The natural catchment area of stores in Aylesford extends into Zone 1, and a degree of expenditure leakage is expected to occur.

- 3.35 The Rural Service Centres and Larger Village Centres in the Borough are all located in Zone 2. Local residents in these smaller settlements have good access to small convenience stores (16 as listed in Table 11 in Appendix 2). These facilities meet the day to day top-up shopping needs of local residents. Residents look to the larger stores in Maidstone to meet their main bulk food shopping needs. Convenience goods expenditure retention in Maidstone Borough in Zone 2 is relatively high at around 71%.
- 3.36 Respondents to the household telephone survey were asked what they like and dislike about shopping in Maidstone. Only 2 respondents (0.3% of the total) suggested there are not enough food supermarkets.
- 3.37 Based on the choice of food stores, mix of uses and good expenditure retention, Maidstone is well served in terms of convenience goods shopping provision. Food store and convenience retail provision in Maidstone Borough is strong, particularly in Maidstone urban area where the large food stores (over 1,000 sq. m net) suitable for main and bulk food shopping are focused. The smaller centres provide a smaller food stores suitable for basket and top up shopping. There are no clear identified areas of qualitative deficiency in food store provision within the Borough.

Comparison goods shopping

- 3.38 Within Maidstone, the Rural Service Centres and Larger Village Centres in the Borough there are over 200 comparison shops/stores providing total comparison goods sales floorspace of over 77,000 sq.m net (including comparison floorspace in food stores and retail warehouse parks). Table 10, in Appendix 3 provides a breakdown of the comparison floorspace by location.
- 3.39 In line with its role at the top of the shopping hierarchy in the Borough, Maidstone has a high proportion of Class A1 comparison units, above the national average. The provision of comparison good shopping is more limited in the smaller centres in the Borough, where the retail offer is predominantly small (less than 100 sq.m net) independent traders.
- 3.40 The retail warehouse sector is reasonably well represented in Maidstone Borough. London Road Retail Park comprises Dreams, Dunelm, Home Bargains, Argos, Jolleys, and Iceland Food Warehouse. St Peters Wharf Retail Park comprises: Asda Living, Hobbycraft, TK Maxx/Home Sense and The Range. Nearby, there is a Wickes Extra. In addition, there is a B&Q on Barker Road.
- 3.41 The household survey (August 2019) asked respondents where they shop for a range of comparison goods. A breakdown of comparison goods expenditure retention (excluding internet and home shopping) for the Maidstone Borough across the whole study area is shown in Table 3.3 below.
- 3.42 The results indicate that, even excluding home shopping, Maidstone has relatively high levels of comparison goods expenditure retention for all product categories in the Borough. A reasonable element of the expenditure leakage (over 14%) is attracted to large stores at Aylesford, just outside the Borough boundary and Bluewater Shopping Centre's regional catchment area extends into the Borough.
- 3.43 Comparison goods retail provision is strong within the Borough, but provision is primarily concentrated Maidstone urban area. The Borough has a reasonably high level of expenditure retention for all product categories, reflecting Maidstone's role as the main shopping destination. Maidstone town centre has a good mix of discount, mid-market and higher order comparison goods shopping and the out of centre retail stores also provide a range of comparison goods shopping.

Table 3.3 Comparison goods expenditure - Maidstone Borough market share (% of total expenditure)

Goods category	% in Borough	% in study area
Clothes and shoes	57.1	33.8
Recorded media	82.4	45.1
Domestic electric appliances (e.g. fridges/kitchen items)	27.9	12.6
Books and stationary	77.4	36.9
Toys, games, sports, hobby, pet products	52.5	27.3
Furniture, soft furnishings and floor-coverings	53.6	33.9
DIY, hardware and garden items	66.8	25.1
Health and beauty items	64.1	30.3
Other comparison goods (e.g. jewellery/glassware/household)	60.4	32.9
All comparison goods total	56.9	29.4

Source: NEMS Household Shopper Survey August 2019 and Lichfields' analysis *70:30 split for 1st and 2nd destinations

3.44 There is limited potential to increase its market share of comparison goods expenditure, not least due to development proposals in the sub-region, including further expansion at Bluewater. The objective of the development strategy for Maidstone Borough should therefore be to maintain the Borough's current shopping role in the face of increasing competition. The economic projections in this section assume there will be a marginal reduction in the Borough's share of comparison expenditure in the study area due to developments in surrounding authorities.

Food/beverage uses

3.45 Maidstone Borough has 145 Class A3 to A5 outlets within designated centres as shown in Table 10 in Appendix 4. In addition, there are many other facilities throughout the Borough. As indicated in Figure 3.1 above, Maidstone town centre has a relatively high proportion of Class A3 café/restaurants when compared with the Goad national average. In terms of food/beverage expenditure retention, Maidstone retains nearly 86% of expenditure in Zone 1 and 73% in Zone 2. Local residents in these smaller settlements have access to villages pubs, restaurants/café and takeaways (as listed in Table 10 in Appendix 4).

Commercial leisure uses

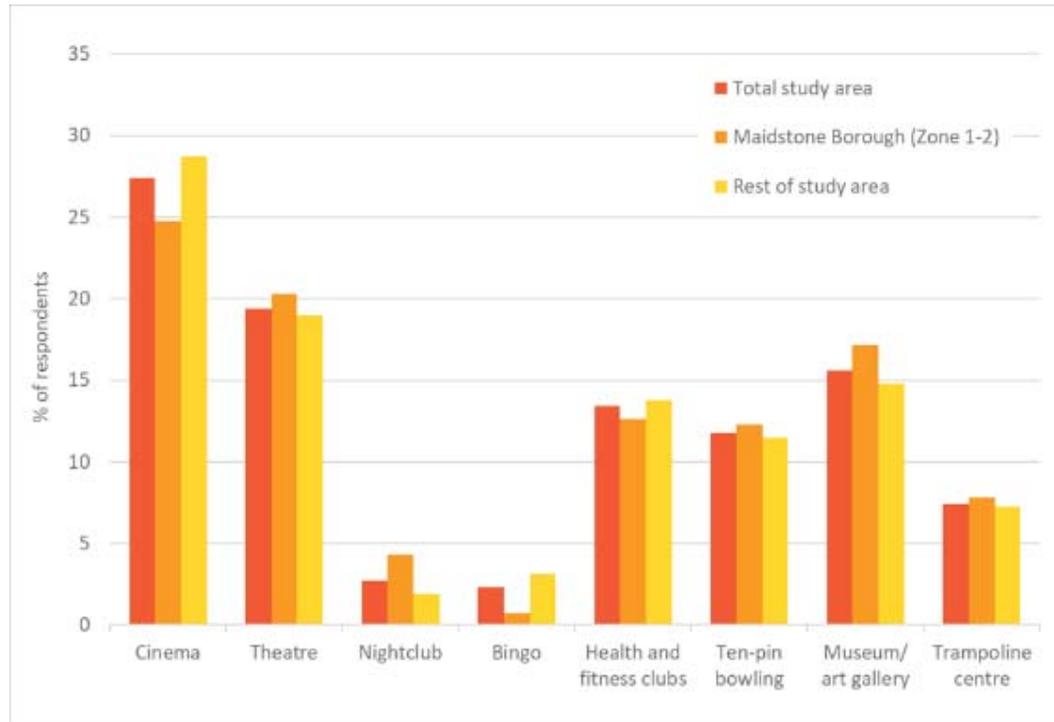
3.46 This section assesses the need for commercial leisure uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, and private health and fitness clubs, that are also classified as main town centre uses within the NPPF.

3.47 Household survey respondents were also asked about their family's leisure activities. The participation rates within the study area are shown in Figure 3.2 overleaf.

3.48 Within Maidstone Borough area (Zones 1 and 2), the household survey identifies that visiting the cinema is the most popular leisure activity, followed by the theatre and museums and art galleries. Ten-pin bowling and health and fitness clubs have lower levels of participation, but this reflects the national picture. Participation rates for bingo and nightclubs are much lower. Participation rates in the rest of the study area are broadly in line with Maidstone Borough.

3.49 Residents in Maidstone Borough have relatively good access to a range of commercial leisure and entertainment, including facilities in neighbouring authorities and Central London (relatively good access by public transport – around 1 hour by train). Most of the key sectors are represented.

Figure 3.2 Main leisure activities % household participation rates



Source: NEMS Household Survey (July 2019)

3-50 Based on Lichfields' experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20-minute travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from clustering together on leisure parks.

3-51 The main concentration of commercial leisure uses is at Lockmeadow Entertainment Centre, which includes Odeon multi-plex cinema, Hollywood Bowl, Gravity Trampoline Park, David Lloyd Sports and Health Club with indoor pool and spa facilities, as well as some restaurants and Maidstone Market. This park serves much of Maidstone, and those in the wider study area zones, due to its good accessibility from Maidstone West train station and via the A229.

Cinemas

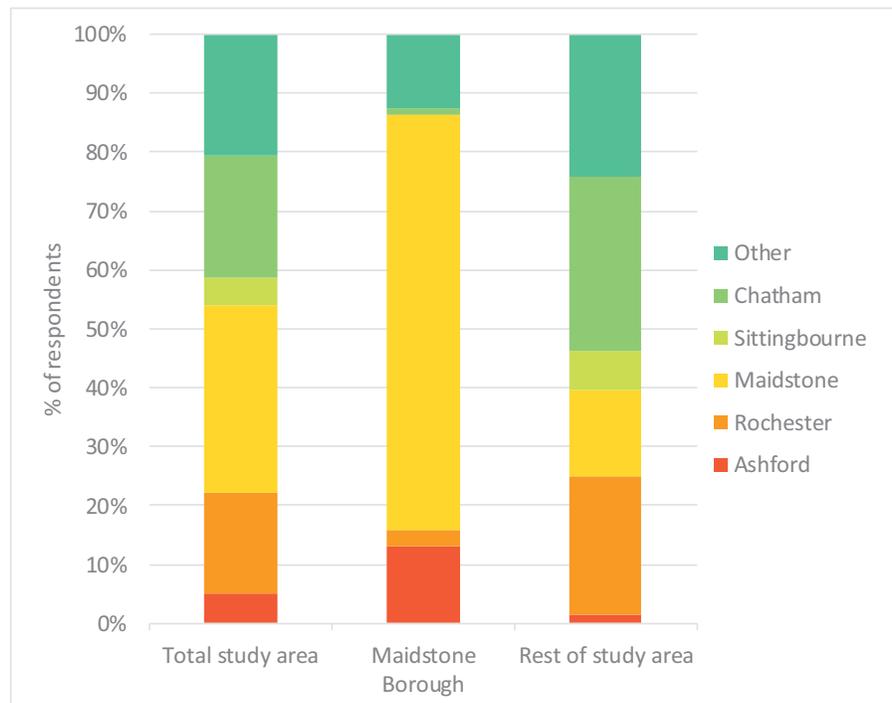
3-52 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. In 2017, the figure rose slightly to 170.6 million (Source: British Film Institute). Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The national average visitation rate is 2.7 trips per person per annum.

3-53 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The

national average is about 40,000 cinema trips per screen per annum or 210 trips per seat per annum.

- 3-54 The existing cinema provision (full time) in Maidstone is limited to the Odeon at Lockmeadow Entertainment Centre with 1,638 seats (8 screens). Other nearby cinemas include Cineworld in Rochester (9 screens, 2,146 seats), Odeon in Tunbridge Wells (9 screens, 1,893 seats) and Odeon in Chatham (9 screens, 1,928 seats). The household survey suggests that approximately 60% of respondents within the study area visit the cinema. Figure 3.3 shows the main cinema destinations.

Figure 3.3 Cinema destinations (% of participating respondents)



Source: NEMS Household survey, July 2019

- 3-55 The study area population is 576,026 (2019) and this would generate around 1,555,000 cinema trips per annum, based on the national average visitation rate (2.7 trips per annum). Maidstone currently retains 31.6% of cinema trips across the study area, which suggest the Borough attracts about 491,000 trips. Adopting the national average population per cinema screen/seats (40,000 trips per screen and 210 trips per seat), this number of trips could support 12 screens or 2,338 seats. These figures suggest a shortfall of 4 screens or 700 seats.
- 3-56 The study area population is projected to increase to 694,525 by 2042. If Maidstone can maintain its market share of cinema trips (31.6%) then it could attract 592,000 trips by 2042. These trips would support 15 screens or 2,819 seats. These projections suggest a shortfall of 7 screens or 1,181 seats.
- 3-57 The Council is the landlord of Lockmeadow Entertainment Centre and has plans to enhance the venue, which include additional screens. If additional screens are not provided at Lockmeadow then there is theoretical capacity for a medium sized or boutique cinema in Maidstone over the plan period. For example, Curzon and Everyman are art house cinema operators who have expanded in recent years. Maidstone may be able to attract such an operator and an additional facility would offer more choice.

Theatres

- 3.58 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.
- 3.59 Experian's local expenditure data indicates the study area generates over £19 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) the study area population generates demand for 3.3 theatre venues.
- 3.60 The household survey indicated that 42% of respondents in the study area visit theatres. Theatres within Central London were the most popular destinations, attracting 47% of theatre trips, followed by The Marlowe (Canterbury) with 13.5% of trips. Maidstone's Hazlitt Theatre's share of trips was 10.8%, which suggests this venue attracts revenue of £2.1 million. This is lower than the national average per venue (£5.7 million) but may reflect the lower number of seats available.
- 3.61 The Hazlitt Theatre is located on Earl Street and has seating for up to 353 people, which is lower than the national average attendance per performance. The theatre complex also has a second professional performance space, the Exchange Studio, with seating for 135, which can be flexibly used for between 100 and 200 people. There is also a small performance room called The Fourth Wall, which has a capacity of 60.
- 3.62 The relatively close proximity of Maidstone to Central London will affect the likely demand for theatre and concert facilities in the study area. There is no clear need for additional theatre/concert hall provision in the Borough. However, the development strategy needs to be flexible to respond to emerging opportunities for new facilities of this kind.

Health and fitness clubs

- 3.63 The 2019 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 10.4 million fitness members in the UK, and the penetration has passed 15% for the first time. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 4.2% growth in market value. 215 new fitness facilities were reported to have opened in the last twelve months, down from 275 in 2018.
- 3.64 The Sport England/Active Places data indicates that there are 16 registered health and fitness suites in Maidstone, with 1,025 fitness stations in total, as shown in Table 3.4 overleaf. Three of these facilities are for private use only. One facility is 'pay and play', and the remaining thirteen registered facilities are open for the public to register as members. In addition, there are two further non-listed facilities in Maidstone town centre i.e. Snap Fitness and Core Gym with at least 50 fitness stations.
- 3.65 The current population in Maidstone Borough (Zones 1-2) is 172,901 (2019). This population indicates that Maidstone has 6.2 fitness stations per 1,000 people (1,075 stations in total).
- 3.66 The South East of England region has 1,162 registered health and fitness suites with 57,559 fitness stations (average of 49.5 stations per suite). This existing provision equates to around 6.1 fitness stations per 1,000 people in the South East. Maidstone has a similar provision of fitness stations (6.2 stations per 1,000 people). This suggests there is an appropriate and suitable number of stations and facilities in Maidstone and no clear need for additional gyms.

Table 3.4 Maidstone health and fitness suites

Name	Type	No. Fitness Stations
Bob Prowse Health Club	Registered membership	65
David Lloyd Club (Maidstone)	Registered membership	200
Feel Good Health Club (Mercure Hotel)	Registered membership	33
Freedom Leisure Maidstone	Registered membership	81
HMP Maidstone	Private Use	26
Livingwell Health Club (Maidstone)	Registered membership	28
Maidstone Leisure Centre	Pay and Play	115
Marriott Leisure & Country Club	Registered membership	72
St Augustine Academy	Private Use	17
Sydney Wooderson Sports Centre	Private Use	24
The Lenham School	Registered membership	26
Trugym Maidstone	Registered membership	110
Village Gym (Maidstone)	Registered membership	90
Weald of Kent Golf Club	Registered membership	8
Welcome Gym (Maidstone)	Registered membership	70
Total	-	1,025

Source: Active Places, 2019

- 3.67 Growth in population between 2019 and 2042 in Maidstone Borough (Zones 1 and 2) is +37,992 people. This additional population could support 232 fitness stations based on the South East average (6.1 stations per 1,000 people). There could be scope for 4 to 5 medium sized additional gyms (up to 50 stations) in the Borough by 2042.

Tenpin Bowling

- 3.68 There is one tenpin bowling facility in Maidstone – Hollywood Bowl at Lockmeadow Entertainment Centre (18 lanes). Other facilities that serve the stud area include:
- Hollywood Bowl in Tunbridge Wells;
 - Lordswood Bowling Centre, Chatham;
 - Chatham Bowl, Chatham town centre;
 - Hollywood Bowl, Rochester; and
 - The Original Bowling Co in Rochester.
- 3.69 The household survey results suggest that 25.4% of households in the study area visit tenpin bowling facilities, and of those who visit bowling facilities they mainly go to Hollywood Bowl, Lockmeadow. Maidstone market share of bowling trips in the study area is (47.1%). Other main destinations are Rochester town centre (13%) and Chatham town centre (9.2%).
- 3.70 The study area population (576,026 in 2019) could theoretically support 48 lanes, based on one lane per 12,000 people (national average). These figures suggest Maidstone’s market share of tenpin bowling trips could support 22 lanes.
- 3.71 Population growth within the Borough (+37,992 people between 2019 and 2037), could support a further 3 lanes by 2042.
- 3.72 The Hollywood Bowl at Lockmeadow Entertainment Centre has 18 lanes. This suggests there is limited theoretical scope for 4 additional lanes at 2019 and possibly 7 lanes by 2042. The close proximity of other tenpin bowling facilities will have an impact on the likely demand for

additional facilities in the Borough. There is no clear need for additional tenpin bowling provision in Maidstone.

Bingo, Games of Change and Gambling

- 3.73 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot.
- 3.74 The Gambling Commission indicates there are 650 bingo facilities in Great Britain (2018) and 152 casinos. This equates to approximately one bingo facility per 100,000 people and one casino per 425,000 people. The population in the Borough (Zones 1-2) at 2019 (172,901 people) could in theory support 1.7 bingo facilities and 0.4 casinos based on the national average.
- 3.75 The household survey results indicated that only 5% of households in the study area visit bingo facilities. Of these participants, 21.7% visited Buzz Bingo in Chatham, but most of these visitors live in Zone 5 (Chatham). Just over 15% of participants visit bingo facilities in Maidstone i.e. Buzz Bingo (formerly Gala Bingo), most of these visitors (nearly 79%) live in Zone 1 (Maidstone central).
- 3.76 The results of the household survey suggest people do not tend to travel long distances to visit bingo facilities. The existing provision seems sufficient to meet the requirements of the existing and future population of the Borough, with surrounding zones served with other bingo facilities within closer proximity. There is no clear need to plan for additional bingo facilities in Maidstone Borough.
- 3.77 There are some small casino facilities in the study area (Merkur Casino in Maidstone, an Admiral Casino in Gillingham, a Merkur Casino and Admiral Casino in Chatham).
- 3.78 Based on the national average population per casino, there would be insufficient population to support further casino facilities in Maidstone. However, the population of the whole study area (Zones 1-6) is 576,026 in 2019 and Maidstone has high levels of accessibility, suggesting one casino could be supported.

Trampoline and climbing centres

- 3.79 Indoor trampoline and climbing centres are relatively new leisure activities 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 on 31 May 2014.
- 3.80 Trampoline and indoor climbing centres offer a new, recreational experience for both children and adults. Trampoline centres typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms. Large climbing facilities can provide 20 to 30 climbing challenges and soft play areas e.g. Rock Up which now has 7 facilities in the UK.
- 3.81 There is an indoor trampoline centre in Maidstone i.e. Gravity Trampoline Park at Lockmeadow Entertainment Centre and the Climbing Experience is located at St Peters Wharf. Despite these existing facilities, the future strategy should be flexible to respond to any emerging new leisure opportunities.

Other Leisure, Entertainment and Cultural Uses

3.82 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 family entertainment centres, escape rooms and virtual golf centres. The representation of these uses is relatively limited in Maidstone. Given the fragmented nature of these sectors it is difficult to quantify the potential demand for these uses over the plan period.

3.83 The household survey results suggest that total participation rates in the study area is 5.8% for nightclubs, 33.9% for museums and art galleries. The creative industries are in a fast growing sector. This growth along with high participation rate in this activity suggests there should be potential to improve arts and cultural facilities in the town centre.

3.84 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere.

3.85 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. Of the household survey respondents that visit nightclubs, 56.5% visit Maidstone. Maidstone is accessible to Central London. There does not appear to be qualitative need to provide further nightclub facilities in Maidstone Borough. However, the development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Conclusions on commercial leisure facilities

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

- There is scope to provide additional screens at the Lockmeadow Entertainment Centre. If additional screens are not provided at Lockmeadow then there is theoretical capacity for a medium sized or boutique cinema (up to 7 screens and over 1,000 seats) in Maidstone over the plan period.
- There is scope for 4 to 5 medium sized additional gyms (up to 50 stations) in the Borough by 2042.
- There is no clear need for additional theatre, tenpin bowling, bingo, casino, nightclub/live music venues or trampoline facilities in the Borough. However, the development strategy should to be flexible to respond to emerging opportunities for new leisure facilities.

4.0 Needs of Local Businesses

4.1 A business survey was undertaken as part of the EDNS study to gain a better understanding of the needs of local businesses operating in the Borough, and the main factors that support and inhibit their growth. This involved a sample of 19 businesses operating across a range of sectors and locations in Maidstone. A summary of the key findings is set out below with a copy of the survey questionnaire included at Appendix 6.

4.2 The survey findings are intended to provide a flavour of the issues affecting businesses in Maidstone Borough rather than representing a comprehensive overview of business needs. Analysis presented in this section is based on the number of responses received to individual survey questions.

Business Profile

4.3 The greatest proportion of respondents (42%) to the survey were from micro businesses (those with 0-9 employees). 26% were from businesses with 10-49 employees, 26% were from businesses with 50-249 employees and 5% were from businesses with 250 employees or more. Respondents had been located within the Borough for differing amounts of time, with 53% of companies less than 20 years, 32% for 20-50 years and 16% having been located in the Borough for over 50 years.

Current Business Premises

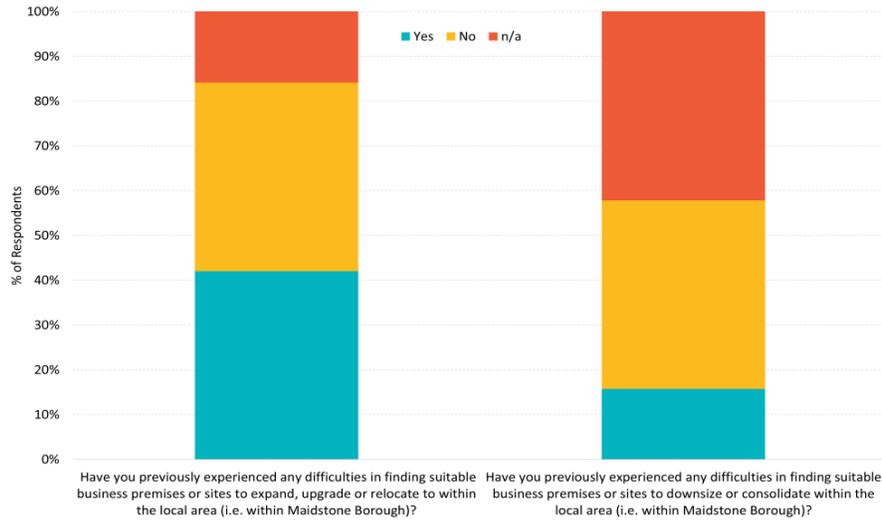
4.4 The most common type of employment site that respondents currently occupy is office sites (43%), followed by home offices (26%) and factory / workshop sites (17%). The majority of respondents' sites were freehold (42%), with 32% being leasehold, 11% managed workspace, 11% home sites and 5% other. When asked why they were located on their existing sites, respondents identified the most important key factors as affordability of premises and road accessibility, and the least important (in terms of options provided) were accessibility of training providers and proximity to the supply chain.

4.5 The majority (78%) of respondents were 'very satisfied' or 'quite satisfied' with their current premises, with the remaining 22% reporting that they were not currently satisfied. When asked about whether their current premises meet the space needs of their businesses, 53% said the amount of space they had was 'about right', while 21% do not have enough space and 26% have room to grow.

4.6 Although the majority of business respondents were satisfied with their current premises, 42% said that they have previously experienced difficulties in finding suitable premises to expand, upgrade or relocate to (Figure 4.1). However, the same percentage (42%) of businesses have not experienced difficulties with this. Additionally, 16% of businesses stated that they had previously had trouble in finding suitable premises to downsize or consolidate to.

4.7 Of the businesses that had experienced barriers to finding suitable premises, common difficulties cited were the lack of suitable premises, need for lower rental rates, too much traffic around key sites and lack of parking facilities.

Figure 4.1 Business Survey Responses

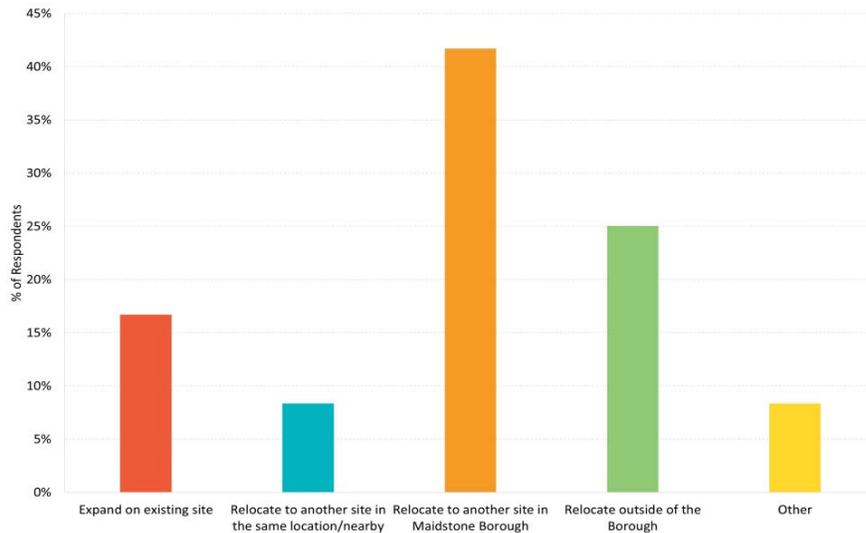


Source: Lichfields analysis

Future Growth Plans

- 4.8 When asked whether their business had aspirations to expand or relocate their premises in the next 5 years, just under half (47%) of respondents declared that they did. A further 21% of respondents reported that they would ‘possibly’ expect to expand or relocate in the next 5 years, with 32% of respondents stating that they did not have any ambition to relocate.
- 4.9 Of those that expect to relocate/expand or possibly relocate/expand, 42% of businesses plan to relocate to another site in Maidstone Borough, 25% expect to relocate outside of the Borough and 17% expect to expand on their existing site (Figure 4.2). The main reasons cited for potentially moving outside of the Borough include perceptions of cheaper rents elsewhere (e.g. in Medway) and the desire to relocate to an area with less traffic congestion.

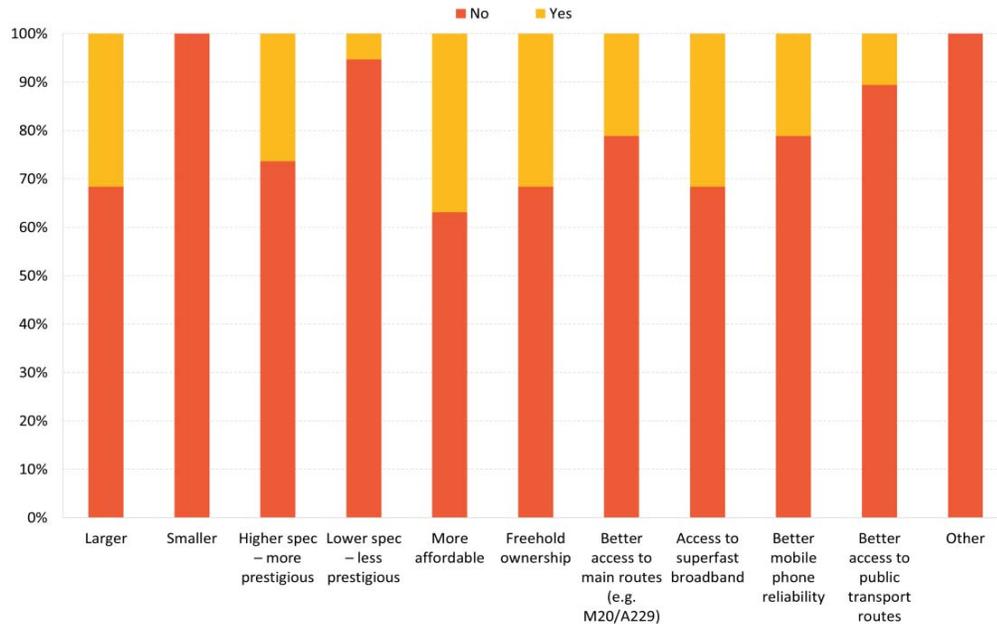
Figure 4.2 If expecting to expand or relocate, what are you most likely to do?



Source: Lichfields analysis

4.10 Figure 4.3 summarises the most important reasons or drivers for businesses seeking to relocate or expand, which include; securing more affordable premises (37%), access to superfast broadband (32%), securing larger premises (32%) and attaining freehold ownership (32%). No businesses in the survey stated that they would be seeking smaller accommodation and very few businesses stated that they would seek lower specification premises.

Figure 4.3 What would you be looking for from new premises?



Source: Lichfields analysis

4.11 When asked whether there are any factors that could prevent their business from staying in the area, the most common answers were around the affordability of suitable premises, accessibility and traffic congestion, lack of skilled labour and lack of parking. Some respondents also referred to limited availability of lifestyle amenities such as gyms, restaurants and cafes in proximity to their current site in the Borough.

Summary

4.12 The key points to summarise from the business survey feedback are presented below:

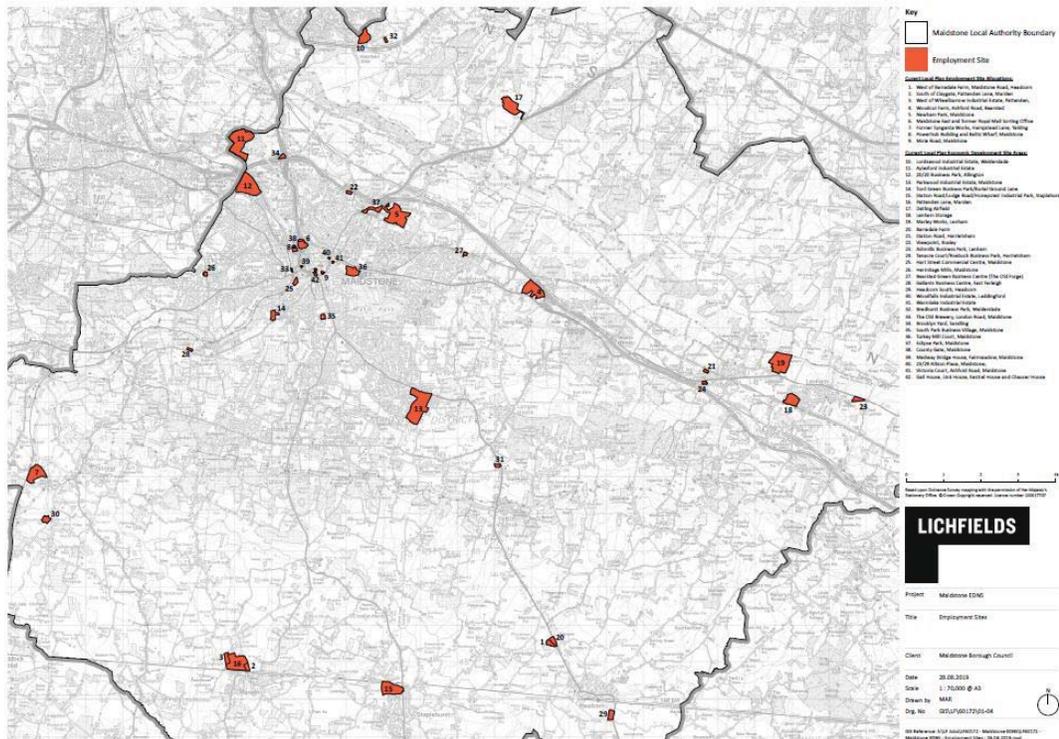
- 1 The majority of business respondents (78%) are very satisfied or quite satisfied with their current premises. Over half of businesses said they had the right amount of space for the time being, with 21% currently lacking the space they need.
- 2 42% of businesses have experienced issues when trying to upgrade or expand their premises, and a further 16% have previously had trouble in finding suitable premises to downsize or consolidate within the Borough. This suggests that upgrading or expanding premises appears to be more of an issue amongst the local business community than downsizing.
- 3 Just over two thirds of businesses expect to or possibly will, expand or relocate during the next 5 years. Of these, most businesses hope to relocate to another site in the Borough of Maidstone.
- 4 In terms of wider business environment factors, respondents cited a recurring issue of traffic congestion and lack of parking within Maidstone Borough throughout the survey.

5.0 Review of Employment Land Supply

5.1 This section presents the findings of an assessment of employment land supply in the Borough and considers the characteristics and quality of existing and potential employment sites in Maidstone and their suitability to meet future employment development needs.

5.2 In consultation with the Council it was agreed that the assessment should focus on 42 sites that are either currently in employment use (Local Plan ‘Economic Development Site Areas’) or allocated by the current Local Plan for employment use. The location of the assessed sites is shown on the map in Figure 5.1 below.

Figure 5.1 Map of Maidstone Employment Sites Assessed



Source: Lichfields

5.3 Each of the 42 identified sites were inspected and assessed by Lichfields in accordance with the former ODPM Guidance on Employment Land Reviews and more recent PPG, and assessed against the following criteria:

- a Strategic and local road access;
- b Proximity to labour and services;
- c Compatibility of adjoining uses;
- d Site size, characteristics and potential development constraints; and
- e Attractiveness to the market, including vacancy and market activity on sites.

5.4 In addition to the above site criteria, the assessment also considered other site factors such as their policy status, planning constraints, suitability for specific uses, and any key barriers to delivery of undeveloped sites.

- 5.5 Individual plans for assessed sites are included in Appendix 7, while details of the criteria used to assess these sites are contained in Appendix 8. Tables summarising the assessment of each site against these appraisal criteria are also included at Appendix 9.
- 5.6 It should be noted that the assessment process in itself does not necessarily provide a complete picture of the local significance of certain sites. For example, a site could be assessed to have the potential to satisfy particular business and sector needs (i.e. which can be important reasons for retaining the site) even if it does not perform well against conventional site assessment criteria.
- 5.7 It is also important to note that the assessment is based on current conditions and intrinsic qualities of sites and that the associated scoring has been derived on this basis. It is possible that the scoring and relative rankings of sites could change in the future if measures were put in place to enhance their functioning as employment sites, for example through new infrastructure and servicing.

Economic Development Site Areas

- 5.8 The Borough's stock of Economic Development Site Areas represents a varied portfolio of 33 sites providing a mix of site types, business premises and locations across the Borough. 25 of these sites are designated through the Maidstone Borough Local Plan (Policy SP 22) for use classes B1, B2 and B8, with the remaining 8 designated for use class B1 only.
- 5.9 In overall terms, these existing employment sites are generally well used and occupied by a range of businesses and appear to be serving a local business need. As shown in Appendix 9, the scoring of each site against the suite of assessment criteria varies quite significantly, reflecting the respective strategic/local access associated with each site, surrounding uses and site location relative to labour and services etc.
- 5.10 Sites that score highest from this scoring exercise include County Gate and Medway Bridge House in Maidstone town centre, and Eclipse Park on the edge of Maidstone town adjoining the M20. This reflects a combination of accessibility, proximity to town centre services and market attractiveness factors.
- 5.11 By contrast, lowest scoring sites include Station Road (Staplehurst), Woodfalls Industrial Estate (Laddingford) and Bredhurst Business Park (Walderslade), reflecting their more peripheral and secondary market locations within the Borough. However, these lower scoring sites still perform an important role in accommodating local business activity (including lower value activity in some cases) and form a key components of the Borough's overall employment land supply portfolio. This means that there are very few candidates for release to other, non B class uses, with the exception being Tovil Green Business Park/Burial Ground Lane on the south west fringes of Maidstone town which appears run down and poor quality with a number of derelict and vacant buildings located on site.
- 5.12 Most of the Economic Development Site Areas were fully built out and in active use at the time of assessment, with very little in the way of remaining undeveloped land. Some of the sites, particularly those accommodating older, secondary stock, offer scope for more intensive use in the event that redevelopment were to occur, albeit this would be subject to redevelopment schemes being viable which could prove to be challenging in more peripheral, secondary market locations (i.e. those further away from Maidstone town and the M20/M2 strategic corridors).
- 5.13 Some of the Borough's existing employment sites have seen recent residential development taking place within either adjoining sites or in close proximity (e.g. across the road), such as Parkwood Industrial Estate and Hermitage Mills on the edge of Maidstone. Whilst these nearby residential uses do not appear to have created any significant operational issues for business occupiers as yet, they could act as a constraint to future development and/or redevelopment of

these Economic Development Site Areas and will be a relevant consideration here. Similarly, some of the assessed sites appear to be accommodating some quasi or wider employment uses (such as trade counters and retailers) which is not inconsistent with Local Plan policy SP 22 but does limit the capacity available for more traditional B use classes.

Employment and Mixed-Use Allocations

- 5.14 The Maidstone Borough Local Plan allocates four specific sites for employment uses at Policy EMP1, all of which have been assessed as part of this EDNS:
- EMP1(1) West of Barradale Farm, Maidstone Road, Headcorn
 - EMP1(2) South of Claygate, Pattenden Lane, Marden
 - EMP1(3) West of Wheelbarrow Industrial Estate, Pattenden Lane, Marden
 - EMP1(4) Woodcut Farm, Ashford Road, Bearsted
- 5.15 A further five sites are allocated for retail and mixed-use development at Policy RMX1 which include an allowance for employment uses, as follows:
- RMX1(1) Newnham Park, Bearsted Road, Maidstone
 - RMX1(2) Maidstone East and former Royal Mail Sorting Office, Sandling Road, Maidstone
 - RMX1(4) Former Syngenta Works, Hampstead Lane, Yalding
 - RMX1(5) Powerhub building and Baltic Wharf, St Peter's Street, Maidstone
 - RMX1(6) Mote Road, Maidstone
- 5.16 Together, these sites provide a good mix of future development opportunities for a range of B class uses across different locations within the Borough, including Maidstone town centre (e.g. Maidstone East, Powerhub building, Mote Road), edge of town locations (e.g. Woodcut Farm, Newnham Park) and smaller settlements/more rural areas of the Borough (e.g. Syngenta Works, Claygate, and Barradale Farm).
- 5.17 The majority of these allocations have planning permissions for B use class development either granted or pending, indicating their general appeal and attractiveness to the market.
- 5.18 Again, overall scoring of these sites against the appraisal criteria varies significantly reflecting their respective location, site characteristics and likely market attractiveness. Some of these sites are likely to have significant challenges and barriers to redevelopment (such as the Powerhub site which includes a listed building on site) while others effectively represent extension areas for existing employment sites (such as Claygate/Pattenden Lane) which do not appear to have significant barriers or constraints to development in future.
- 5.19 Further commentary is provided in the following chapter regarding the potential role that these site allocations could play in meeting future economic development needs in Maidstone Borough over the study period to 2037.

6.0 Strategy Implications for Employment Uses

6.1 This section draws together forecasts of future employment space needs in Section 2.0 and estimates of pipeline employment land supply to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

Quantitative Balance

6.2 Section 2.0 identified a need for between -202,500 sq.m and +259,760 sq.m of employment space for Maidstone Borough over the new Local Plan period 2022-37 in gross terms, reflecting a relatively wide variation in the level of growth that could be supported by Maidstone's economy over the plan period. The majority of this spatial requirement relates to industrial and distribution uses, reflecting the lower job densities associated with these types of operations (compared with office uses which tend to operate at higher densities).

Pipeline Supply

6.3 The supply of employment space in the development pipeline comes from sites that have been allocated for either employment uses or mixed-use development through the Maidstone Borough Local Plan (policies EMP1 and RMX1 respectively) as well as extant planning permissions for B class development on non-allocated sites.

6.4 The Council's latest monitoring data (as at February 2020) provides information on planning permissions and land availability within each of these categories. Based on this information, the space available to help meet future needs in Maidstone Borough is estimated to comprise just under 126,000 sq.m of B class space in net terms as shown in Table 6.1.

Table 6.1 Supply of Employment Floorspace in Maidstone Borough (at February 2020 – latest available position)

Source		Remaining Employment Space Supply (sq.m)			
		Office (B1a/b)	Industrial (B1c/B2/B8)	Mixed B	Total B
Employment Allocation	EMP1 (1) West of Barradale Farm		1,936	3,564	5,500
	EMP1 (2) South of Claygate, Marden			6,800	6,800
	EMP1 (3) West of Wheelbarrow Industrial Estate, Marden			10,193	10,193
	EMP1 (4) Woodcut Farm, Bearsted			49,000	49,000
Mixed Use Allocation	RMX1 (1) Newnham Park, Maidstone	24,750			24,750
	RMX1 (2) – Maidstone East and forming Royal Mail sorting office	4,000			4,000
	RMX1 (4) Former Syngenta works, Yalding			41,451	41,451
	RMX1 (5) Powerhub Building and Baltic Wharf, Maidstone	Not specified			
	RMX1 (6) Mote Road, Maidstone	2,000			2,000
Extant planning permissions on non-allocated sites (not started)		-748	-17,106		-17,854
Total		30,002	-15,170	111,008	125,840

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

- 6.5 The majority (88%) of this supply is expected to accommodate a mix of B use classes so is relatively flexible in nature. Just under a quarter (24%) relates to office (B1a/b) uses while industrial (B1c/B2/B8) supply is negative reflecting extant planning permissions that would remove industrial supply from the Borough's stock if implemented in full.
- 6.6 Employment and mixed-use site allocations are expected to make equal contributions to future supply (both at 57%). Table 6.1 also shows that much of the Borough's pipeline supply of employment space is concentrated within a small number of relatively large sites; Woodcut Farm, Newnham Park (Kent Medical Campus) and the former Syngenta works sites between them accommodate the vast majority (92%) of total supply.
- 6.7 The first two of these sites are located on/near to the edge of Maidstone town and in close proximity to the M20 strategic corridor, which represents the Borough's premier market location. The former Syngenta works site by contrast is located in the south west corner of the Borough within a more secondary market area and is currently subject to a planning application to provide a new business park of up to 41,451 sqm of B1c, B2 and B8. Beyond these sites, the remaining supply is distributed across some of the Borough's smaller settlements such as Marden and Headcorn and within Maidstone town centre.

Demand/Supply Balance

- 6.8 A broad comparison of estimated demand for B class space against currently identified supply, as shown in Table 6.2, implies that Maidstone Borough would have sufficient employment space in quantitative terms up to 2037 to meet the needs arising from the baseline job growth scenario (scenario 1) which represents the Council's preferred approach to planning for economic development needs through the new Local Plan.
- 6.9 A shortfall of employment space is identified against the labour supply scenario (scenario 3), while there would be a surplus of employment space under the past take-up based scenario, given that this scenario would not require any additional employment space capacity in future.

Table 6.2 Demand/Supply Balance of B Class Employment Space in Maidstone Borough (2022-2037)

	1. Baseline Job Growth	2. Past Development Rates	3. Labour Supply
Gross requirement for B Class Space (GEA sq.m)	101,555	-202,500	259,760
Available Employment Space (sq.m)	125,840		
Surplus / Shortfall (sq.m)	+24,285	+328,340	-133,920

Source: Lichfields analysis

Meeting Future Needs

- 6.10 As noted in Chapter 2.0, it is recommended that the Council consider planning to accommodate at least the labour demand (job growth) based requirement (scenario 1) to ensure that business growth potential is not constrained by lack of spatial capacity in future. The above demand/supply analysis suggests that in quantitative terms, there would be more than sufficient employment space supply to accommodate additional requirements arising under the baseline job growth future scenario.
- 6.11 In light of the scale of pipeline employment land that has the potential to become available for use over the study period, the flexibility associated with the majority of supply in terms of the mix of B class uses that could come forward, and the resulting surplus of employment land likely

to arise under the preferred growth scenario considered by this study, there is a need for the Borough to identify a realistic delivery trajectory for these employment sites and to understand which sites offer the greatest prospects of accommodating B class development over the period to 2037. Accordingly, it is recommended that the Council should evidence how its portfolio of allocations and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five year periods) in a similar approach to five year housing land supply assessments as required by PPG.

- 6.12 It should be noted that if the supply position changes from that set out above (e.g. if some of the identified employment space capacity is delivered/built out before the start of the Local Plan in 2022) then this could impact upon the overall balance outlined here.
- 6.13 From a more qualitative market perspective, most of the identified employment space supply is located within the Borough's 'premier' market area in and around Maidstone town and the M20 corridor, which tends to attract the majority of occupier demand.
- 6.14 The Woodcut Farm allocation offers the greatest degree of flexibility in terms of B use occupation and is likely to appeal to a range of business users. However, despite a Local Plan allocation and extant planning permission in place for a mix of B use classes, the site has been slow to come forward and the site developer (Segro) cites prohibitive planning conditions for this delay (including a requirement for some office (B1a) uses which is impacting on economic deliverability/viability of the scheme in the current market).
- 6.15 By comparison, Newnham Park – which forms part of the Kent Medical Campus - is more restricted to office (B1a/b) uses and is intended to be focused towards medical related accommodation and occupiers as opposed to more 'general market' users. The site benefits from Enterprise Zone status (forming part of the North Kent Enterprise Zone) and the opportunity for businesses to operate within a campus style cluster that brings together healthcare providers, scientific research and education.
- 6.16 The remaining supply is dispersed across smaller sites either within Maidstone town centre or the Borough's smaller settlements and more secondary market areas, typically involving an extension to an existing employment site, or in the case of the former Syngenta site, development of a proposed new business park. The Maidstone town centre sites (including Maidstone East, Mote Road and Powerhub/Baltic Wharf) provide an important opportunity to enhance the employment role of the town centre and bring well located and in some cases high profile, and underutilised sites back into productive use, albeit with development viability likely to prove a key challenge in the current market. The remaining supply in more secondary market locations is likely to be sufficient to accommodate more localised demand for employment space over the Plan period.

New Garden Communities

- 6.17 In response to the Government's Garden Communities programme, the Council is considering options for a new garden community to provide the new homes needed in the Borough over the Local Plan period. Several garden community-scale proposals have been submitted through the recent Local Plan Call for Sites process⁴ and the Council will assess all the submitted proposals and decide whether any, or none, of the garden community proposals should be included in the draft Local Plan Review.

⁴ Potential new garden community sites include: Leeds Wider Landholding, Land north of Staplehurst, Land north of Lidsing, Langley Heath, Strategic expansion of Marden, Binbury Park, Detling and Pagehurst Farm.

- 6.18 Depending upon the outcome from this review, a new garden community within Maidstone Borough could offer additional employment land supply that could help to meet future employment development needs identified in this EDNS. Indeed, the Council estimate that 40% of overall garden communities land would be identified for non-residential uses including infrastructure, retail and commercial uses.
- 6.19 The potential employment capacity and role of any new garden community within the Borough would need to be subject to more detailed analysis in due course, in particular to consider how employment opportunities created by a new garden community could complement (rather than compete with) existing sectoral strengths and clusters (such as the Kent Medical Campus for example).
- 6.20 Some of the garden community proposals from elsewhere across country propose a broad ratio of '1 job to 1 dwelling' in an attempt to encourage a sustainable model of development, while others have made broad land use allocations that protect a portion of the overall site area for employment uses. Recent research by Lichfields⁵ found evidence of around 600 ha of employment land across 31 proposed garden communities in England, around 20 ha on average per scheme, or around 35 sqm of employment land (as opposed to floorspace) per dwelling. The number of jobs that could be supported by this provision will ultimately depend on the form of development that arises.
- 6.21 The research also found that a number of garden communities contained very significant employment land provision, for example 40 ha at Eynsham Garden Village in Oxfordshire, 32 ha at Taunton Garden Town, and 23 ha at Longcross Garden Village in Surrey. The examples include a mix of both Garden Towns (over 10,000 homes) and Garden Villages (under 10,000). In about a fifth of garden communities, the total provision was less than 5 ha (albeit these were all Garden Villages under 10,000 homes).

Wider Functional Economic Area Supply

- 6.22 As noted in the EDNS Stage One study, Maidstone Borough functions as a relatively self-contained economic area but does have functional linkages and relationships with the surrounding area and in particular, strong functional linkages with adjoining Tonbridge & Malling, including the centres of Aylesford and Kings Hill. It is therefore relevant to consider the overall employment land demand/supply balance position within those authority areas that adjoin Maidstone Borough across this wider functional economic market area. The summary below shows that these authorities are planning to accommodate their own business growth needs in full, with limited scope for over-provision of employment land but also no obvious requirement for 'spillover' capacity from Maidstone Borough.
- 6.23 **Tonbridge & Malling** Borough Council have recently submitted their new Local Plan for Examination, with public hearings expected to take place early in 2020. The Plan proposes to accommodate the Borough's future employment (B class) needs by safeguarding existing employment site allocations (including the large Aylesford Paper Works site within the New Hythe Industrial Area) and proactively encouraging intensification of operational employment areas to make more efficient use of this supply. In overall terms, this spatial strategy is not expected to result in any surplus employment supply that could be used to help accommodate employment requirements arising across the wider FEMA, including from within Maidstone Borough.

⁵ Lichfields Insight: How does your garden grow? A stock take on planning for the Government's Garden Communities programme, December 2019 (<https://lichfields.uk/media/5638/how-does-your-garden-grow-a-stock-take-on-planning-for-the-governments-garden-communities-programme.pdf>)

- 6.24 **Swale** Borough Council is beginning work on the early stages of the Borough's next Local Plan, which the Council are aiming to complete by 2022. Following a change in administration last year, the overall approach and strategy for the Local Plan will now focus on intensification and redevelopment of existing business areas and town centres to accommodate future growth needs, as opposed to large scale garden community development as previously proposed. Politically there is a desire to promote office based sectors in the Borough, including supporting creative industries and attracting higher skilled, higher paid jobs, which would require a step change in the local office market which has never been particularly strong. Demand for industrial premises remains strong and this segment of the market aligns well with the local skills base of the Borough, however the Council reports that it is often difficult to satisfy industrial requirements. The Council consider that the new Local Plan is expected to provide sufficient employment space and site allocations to broadly accommodate Swale's objectively assessed need for B class uses over the Plan period.
- 6.25 **Medway** Council's Local Plan is due to be published later this year, with an overall approach to accommodating growth focused upon consolidating regeneration opportunities within the area's urban centres and waterfronts, complemented by scope for strategic scale growth on the Hoo Peninsula. The industrial market is reported to be buoyant, and the new Local Plan seeks to accommodate future industrial needs through a combination of site allocations on the Hoo Peninsula and the southern periphery of the Borough (at junctions 2 and 3 of the M2 at Strood and Rochester Airfield). The Council is also keen to promote higher value office development through flexible co-working type provision within the key centres of Chatham and Strood. There are also plans for additional B1 development at the Enterprise Zone at Rochester Airfield where the Council owns land. In overall terms, the new Local Plan seeks to meet Medway's own economic development needs and provides an additional 'buffer' allowance in case land fails to come forward in more economically marginal locations.

7.0 Strategy Implications for Town Centre Uses

Accommodating growth

- 7.1 The National Planning Policy Framework (NPPF, 2019) indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres, for at least 10 years. The need for development should be met in full and should not be compromised by limited site supply. To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites.
- 7.2 The NPPF indicates local planning authorities should apply a sequential approach for development. The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. Development should be appropriate in terms of scale and nature to the centre in which it is located. Some forms of retail or leisure facilities, which serve more localised catchment areas, may be more appropriate within local centres, rather than Maidstone town centre.
- 7.3 The assessment of the potential for retail and food/beverage floorspace within the previous sections suggests there is scope for new development within Maidstone Borough during the study period up to 2042. This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace. Table 7.1 summarises the floorspace requirements in the Borough to 2037 and 2042.

Table 7.1 Summary of Class A1, A3 to A5 floorspace projections (sq.m gross GEA)

Area	A1 Convenience (sq.m gross)	A1 Comparison (sq.m gross)	A3-A5 Food/beverage (sq.m gross)	Total (sq.m gross)
By 2037				
Maidstone urban	4,673	730	7,444	12,847
Other Maidstone Borough	1,384	290	1,625	3,299
By 2042				
Maidstone urban	6,397	5,643	12,681	24,721
Other Maidstone Borough	1,771	485	2,731	4,987

Source: Table 13 in Appendix 2, Table 13 in Appendix 3 and Table 13 in Appendix 4.

- 7.4 Long term growth in expenditure per capita is less certain than population growth and the NPPF guidance reflects this by suggesting local plans should allocate sites to meet 10 year projections. Local Plan policies should seek to accommodate the 2037 projections in the first instance, i.e. around 10,800 sq.m gross (GEA), rather than the 2042 projections.
- 7.5 Policy SP4 of the adopted Maidstone Borough Local Plan sets out the vision for Maidstone town centre. The supporting text sets out retail floorspace capacity figures up to 2031, based on the Retail Capacity Study 2013 i.e. 6,100 sq.m net - convenience goods and 23,700 sq.m net - comparison goods (NB – figures are net sales rather than gross). Allowing for the later 2042 end date and net rather than gross floorspace figures, the updated projections are much lower than the figures suggested in the Retail Capacity Study 2013. These floorspace projections will need to be updated and rolled forward to 2042.

- 7.6 The existing stock of premises may have a role to play in accommodating 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 shops could help to accommodate future growth.
- 7.7 There are 56 vacant shop units (17,500 sq.m GEA) within Maidstone town centre, a vacancy rate of 10.6%, which is slightly lower than the Goad national average of 11.8%. This suggests the town centre is performing satisfactorily, in comparison with other town centres. The healthiest centres generally have a vacancy rate of below 5%, because there will always be an element of vacancies, reflecting the normal churn of occupiers.
- 7.8 Nevertheless, vacant premises should help to accommodate growth, given their town centre location and the sequential preference for future investment. If the vacancy rate reduced to 4% in Maidstone town centre, then 35 units would be reoccupied (about 10,900 sq.m GEA).
- 7.9 If this reduction in vacant units can be achieved, then 85% of the overall Class A1 to A5 floorspace projection for Maidstone urban area up to 2037 (12,847 sq.m GEA) can be accommodated. The combined projection to 2042 (24,721 sq.m GEA) would reduce to 13,800 sq.m GEA.

Development Opportunities

- 7.10 Retail and leisure growth should be focused in Maidstone town centre, which has the best prospects for attracting investment. This is consistent with the approach set out in the existing development plan and the NPPF.
- 7.11 A review of mixed use development allocations in Maidstone town centre opportunities has identified four opportunities that could accommodate retail and leisure uses. These opportunities were assessed in Section 8 of the Stage One report. The opportunities and their retail development potential are summarised below:
- RMX1 (2): Maidstone East and former Royal Mail Sorting Office - 5,000 to 10,000 sq.m GEA;
 - RMX1 (3): King Street car park and former MF Bowling – 1,000 to 1,400 sq.m GEA;
 - RMX1 (5): Powerhub building and Baltic Wharf - 3,500 sq.m GEA; and
 - RMX1 (6): Mote Road – 1,500 to 2,000 sq.m GEA.
- 7.12 These sites will be assessed as part of the Local Plan review and the proposed mix of uses and owner's aspirations for these opportunities may change. Notwithstanding the Local Plan review, together these development opportunities could theoretically accommodate between 11,000 to 16,900 sq.m GEA of Class A1 to A5 uses, which together with the occupation vacant units (10,900 sq.m GEA), could be sufficient to accommodate all the Borough's floorspace capacity up to 2042.
- 7.13 In order to meeting housing growth, the emerging Local Plan is likely to include major urban extensions and/or new settlements including garden communities. The infrastructure requirements to serve these potential strategic developments will need to include local shopping facilities to serve the new residents. The local plan should seek to quantify the scale and type of local shopping facilities required to serve new residential development.
- 7.14 Table 7.2 sets out the minimum floorspace capacity required to serve strategic housing developments of 2,000, 4,000 and 6,000 new dwellings. The floorspace projections could be higher if the new local centres are a located where they can also serve existing residential areas.

The expenditure retention rates could also be higher for the larger development scenarios because a critical mass of facilities could be provided.

7.15 Based on Lichfields experience and as a minimum, local centres serving residential areas might reasonably retain 30% of convenience goods i.e. top-up food and grocery and food/beverage expenditure and 10% of comparison goods expenditure i.e. lower order goods purchased on a regularly.

7.16 A small urban extension/new settlement of 2,000 dwellings could support a local centre of about 1,000 sq.m gross. The large development scenario could support local centres totalling about 3,000 sq.m gross or potentially a larger district centre. For this scenario, there could also be potential to include a large food store catering for main food and grocery shopping trips of at least 2,000 sq.m gross.

Table 7.2 Minimum floorspace projections (GEA) for potential strategic housing allocations

	2,000 dwellings	4,000 dwellings	6,000 dwelling
Population	4,400	8,800	13,200
Expenditure generated at 2032 £m	36.56	73.11	109.68
Convenience goods	9.40	18.80	28.20
Comparison goods	21.07	42.14	63.21
Food/beverage	6.09	12.17	18.26
Retained expenditure at 2032 £m	6.76	13.5	20.26
Convenience goods (30%)	2.82	5.64	8.46
Comparison goods (10%)	2.11	4.21	6.32
Food/beverage (30%)	1.83	3.65	5.48
Floorspace capacity at 2032 (sq.m gross)	965	1,927	2,891
Convenience goods	359	717	1,076
Comparison goods	284	567	850
Food/beverage	322	643	965

7.17 Strategic housing development should accommodate a significant element of the floorspace capacity projections for Maidstone urban area and the rest of the Borough.

Development management policies

7.18 This section reviews the current policy approach to retail and town centres as set out in the adopted Maidstone Borough Local Plan.

7.19 The NPPF (paragraph 85) indicates that planning policies should define a network and hierarchy of centres and promote their long term vitality and viability by allowing them to grow and diversify.

7.20 The Local Plan Key Diagram identifies a hierarchy of centres i.e. Maidstone Town Centre; five Rural service centres and five Larger Villages. Consistent with the NPPF, Policy SP1 seeks to maintain and enhance this network of centres.

7.21 Maidstone (529 units) is the main shopping destination in the Borough and is a sub-regional destination. Headcorn (49 units) and Staplehurst (36 units) the next largest Rural Service Centres, but only serve localised catchments, providing a more limited range of retail uses and services. The Larger Village Centres provide smaller clusters of shops and services, serving their immediate local catchment area. The identified hierarchy of centres remains appropriate.

7.22 All development proposals for main town centre uses within out of centre locations should continue to comply with the sequential test, and the impact test for retail and leisure uses, to protect the vitality and viability of the network of centres within the Borough.

Town centre boundary, primary shopping area and frontages

7.23 The designation of primary shopping areas and town centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area where retail will be concentrated. Traditionally primary shopping areas have comprised primary retail frontages and the secondary retail frontages designated in development plans. The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the town centre.

7.24 Adopted Policy SP4 defines a town centre boundary and a primary shopping area for Maidstone town centre. A primary shopping area and town centre boundary should continue to be defined for Maidstone, as the main shopping destination in the Borough.

7.25 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 make reference to the primary shopping area and town centre boundary, clearly indicating where retail and other main town centre uses should be concentrated (i.e. the sequential approach indicates that retail uses should be focused within the primary shopping area and other town centre uses should be focused within the wider town centre boundary, unless it can be demonstrated that there are no suitable and available sites).

7.26 The Maidstone town centre boundary is widely drawn and provides significant flexibility for accommodating a broad range of main town centre uses. The primary shopping area (PSA) is tightly drawn around the retail core, where the larger retail units are concentrated.

7.27 The revised NPPF does not mention the designation of primary or secondary frontages traditionally used to control the mix of uses. However, the NPPG indicates authorities may, where appropriate, define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. The revised NPPF implies a more flexible approach should be considered where diversification could help to maintain the vitality and viability of a centre.

7.28 Town centres should provide a range and mix of complementary uses. A balance between retail, entertainment and leisure activity helps town centres compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings. The retail capacity projections indicate there is a need for a range of new Class A1 to A5 floorspace over the plan period, and a flexible approach capable of accommodate Class D2 leisure and cultural uses is also recommended. This approach is recognised in the revised NPPF, and it is necessary to review the primary and secondary shopping frontage designations and the policy approach within these areas.

7.29 There are four broad policy approaches that could be adopted in Maidstone town centre, as follows:

- 1 strengthening shop frontage Policies DM27 and DM 28 within the Local Plan to provide more control over the loss of retail/leisure uses. This could involve extending the areas of protected frontage and/or reducing the maximum threshold for non-retail uses;
- 2 retaining the current Local Plan policies that seek to control the number and mix of non-retail uses within designated frontages;

- 3 relaxing the current shop frontages policies to allow a more flexible approach to enable more non-retail uses, particularly if the maximum threshold for non-retail uses in Policy DM27 has been breached. This could involve reducing the areas of protected frontage or increasing the maximum threshold for non-retail uses; or
- 4 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.

7.30 Local Plan Policy DM27 (primary shopping frontages) outlines the approach to control non-A1 uses. Within the primary shopping frontages, additional non-shopping (A2, A3, A4, D1 and D2) uses will be granted at ground floor level where it would not result in less than 85% of the ground floor floorspace in the block being in A1 use. Policy DM28 (secondary shopping frontages) provides more flexibility. Goad data suggests around 88% of floorspace at ground level in the PSA is in Class A1 use, compared with the minimum threshold of 85%. The shop vacancy rate in the PSA is 9.5% which is relatively high for a retail core.

7.31 The suitability of the threshold approach in Policy DM27 needs to be considered in the context of recent changes in the mix of uses within frontages, the floorspace projections and recent changes to the General Permitted Development Order (GPDO). The changes to the GPDO will have an impact on frontage policies. These measures allow for greater flexibility for changes of use from retail to non-retail uses subject to Prior Approval e.g. Class A uses to C3 residential use and Class A1 to non-A1 uses. In the future permitted changes of use for smaller units will have an impact on the enforcement of Local Plan policies, i.e. where units are less than 150 sq.m. The ability to control non-A1 uses within the primary shopping frontages and the direction of Class A4 and A5 uses to the secondary shopping frontages will diminish.

7.32 In terms of the additional future policy, there is no evidence to suggest a more restrictive approach is necessary, particularly in view of the mixed floorspace growth projections outlined in this report and relatively high shop vacancy rate in the PSA. A balanced approach should continue to be applied to the mix of uses in Maidstone town centre, and this should be monitored and protected as necessary.

7.33 In the secondary retail frontages, the current approach is robust. The introduction of more restrictive shop frontage policies would be inappropriate because the threshold in the primary frontages provides limited flexibility. This approach could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centre, and recent changes to the GPDO already provide a significant level of flexibility for smaller units.

Impact Thresholds

7.34 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross (GEA). The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- the likely effects of development on any town centre strategy; and

- the impact on any other planned investment.

- 7.35 The PPG states that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross (GEA). The PPG acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, for example if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre. As indicated above, maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.
- 7.36 Local Plan Policy DM16 (town centre uses) sets out the Council's approach to development in edge and out of centre locations. With regards to impact specifically, the supporting text sets out that proposals over 2,500 sq.m will be required to be accompanied by a full assessment of the potential impact on town centres and nearby centres. The current threshold is in line with the NPPF threshold.
- 7.37 The NPPF minimum threshold of 2,500 sq.m gross (GEA) may be inappropriate as a blanket threshold across Maidstone Borough, because this scale of development would represent a significant proportion of the overall retail projections for rural areas served by smaller centres. Retail development smaller than 2,500 sq.m gross (GEA) could have a significant adverse impact, particularly on smaller centres. A reduced threshold should be considered outside of Maidstone urban area. A threshold of 400 sq.m gross (GEA) could be considered in line with the Sunday trading limit (280 sq.m net).

8.0 Overarching Conclusions

Employment Uses

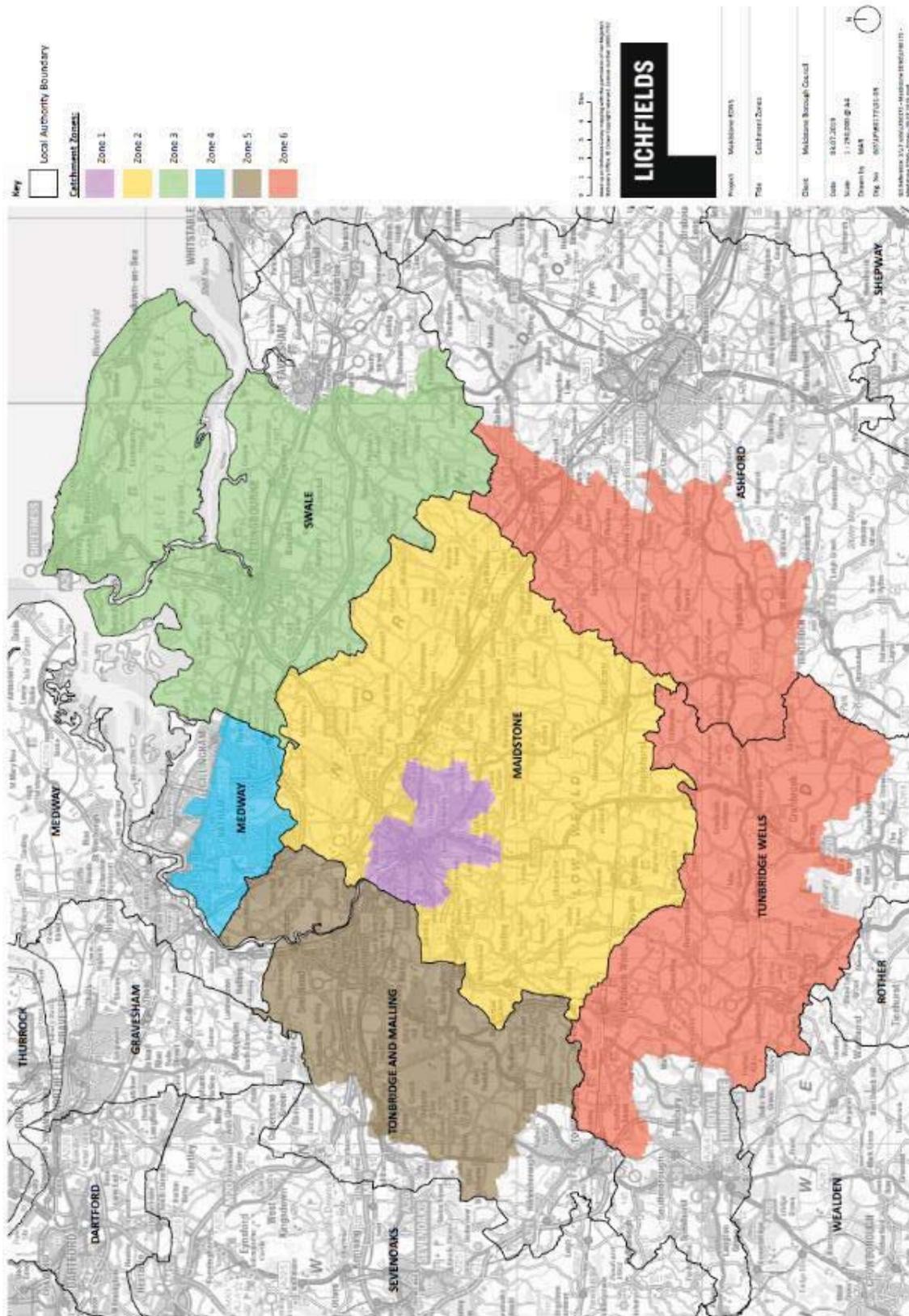
- 8.1 The future growth scenarios considered in this study indicate the broad scale and type of growth associated with different approaches to modelling employment space requirements for Maidstone Borough over the new Local Plan period. To varying degrees, these scenarios reflect both the indigenous growth needs in Maidstone as well as a degree of footloose demand that operates within a wider sub-regional market. In the context of the NPPF and PPG, the policy approach adopted by the Council should aim to positively plan to support the employment needs of the Borough so that the local economy is not unduly constrained over the plan period, but also recognises the issues around land supply and competing pressures on available development sites.
- 8.2 In order to ensure a flexible and responsive policy framework for the Borough, it will be necessary to not just concentrate on meeting the forecast quantitative requirements for office and industrial space in Maidstone Borough, which will fluctuate over time, but to reflect on the opportunities and risks that flow from particular policy approaches. This could include how the delivery of B class employment land can be prioritised in particular areas and for particular uses, or how scope can be created to deliver inward investment opportunities for the Borough, in particular by drawing and capitalising upon the growth opportunities provided by the Kent Medical Campus (North Kent Enterprise Zone) which provides the Borough with a strategic growth opportunity around medical technology, science and innovation.
- 8.3 The Council should also consider the scope to which existing legacy estates and sites in the Borough are no longer productive for employment use and could be better placed to support non-B class employment uses in the future. The assessment undertaken as part of this EDNS found that the Borough's existing employment sites are generally well used and occupied by a range of businesses and appear to be serving a local business need, with very few candidates for release to other non B class uses. Some sites, particularly those accommodating older, secondary stock, offer scope for more intensive use in the event that redevelopment was to occur.
- 8.4 It is recommended that the Council consider planning to accommodate at least the labour demand (job growth) based requirement (scenario 1) to ensure that business growth potential is not constrained by lack of spatial capacity in future. A comparison with the Council's latest supply monitoring information suggests that in quantitative terms, there would be more than sufficient employment space supply to accommodate additional requirements arising under the baseline job growth scenario.
- 8.5 There is a strong likelihood that this employment land supply position will change before the start year of the new Local Plan (i.e. 2022) so the Council will need to closely monitor the position within the intervening period. Of particular relevance are emerging proposals for a new garden community within the Borough which could provide additional employment land capacity as part of a sustainable settlement strategy.

Main Town Centre Uses

- 8.6 The Local Plan Key Diagram identifies a hierarchy of centres i.e. Maidstone Town Centre; five Rural service centres and five Larger Villages. The identified hierarchy of centres remains appropriate. All development proposals for main town centre uses within out of centre locations should continue to comply with the sequential test, and the impact test for retail and leisure uses, to protect the vitality and viability of the network of centres within the Borough.

- 8.7 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development for at least 10 years. A range of suitable sites should be allocated to meet the scale and type of retail development needed over this period.
- 8.8 The combined floorspace projection for Class A1 retail and A3 to A5 food beverage floorspace is 16,146 sq.m gross (GEA) at 2037 increasing to 29,708 sq.m gross (GEA) by 2042. Population growth accounts for most of the combined floorspace projections. Future Local Plan policies should seek to accommodate the 2037 projections in the first instance, i.e. around 16,100 sq.m gross (GEA). A significant proportion of this projection (perhaps two thirds) could be accommodated in vacant shop premises rather than new allocations/development.
- 8.9 There is theoretical capacity to provide additional screens at the Lockmeadow Entertainment Centre or alternatively theoretical capacity for a medium sized or boutique cinema (up to 7 screens and over 1,000 seats) in Maidstone over the plan period. There is also scope for 4 to 5 medium sized additional gyms (up to 50 stations) in the Borough by 2042. There is no clear need for additional theatre, tenpin bowling, bingo, casino, nightclub/live music venues or trampoline facilities in the Borough. However, the development strategy should to be flexible to respond to emerging opportunities for new leisure facilities e.g. reference to Class D2 leisure uses within mixed use allocations and support for these uses within designated town centres.
- 8.10 The short-term priority should be the reoccupation of vacant floorspace in Maidstone town centre. Reoccupied vacant shop units in total could accommodate nearly 11,000 sq.m gross (GEA), which would meet 85% of the overall Class A1 to A5 floorspace projection for Maidstone urban area up to 2037.
- 8.11 The emerging Local Plan is likely to include major urban extensions and/or new settlements. The infrastructure requirements to serve these developments will need to include local shopping facilities to serve the new residents. Strategic housing development could accommodate a significant element of the residual floorspace capacity projections for Maidstone urban area and the rest of the Borough. If the floorspace capacity projections cannot be met within vacant floorspace within Maidstone town centre, then residual growth could be met in neighbourhood or district centres within the strategic housing developments.
- 8.12 A primary shopping area and town centre boundary should continue to be defined for Maidstone, as the main shopping destination in the Borough. The retail capacity projections indicate there is a need for a range of new Class A1 to A5 floorspace over the plan period, and a flexible approach capable of accommodate Class D2 leisure and cultural uses is recommended. There is no evidence to suggest a more restrictive policy approach is necessary. A balanced approach should continue to be applied to the mix of uses in Maidstone town centre.
- 8.13 The NPPF minimum impact threshold of 2,500 sq.m gross (GEA) may be inappropriate as a blanket threshold across Maidstone Borough. A reduced threshold should be considered outside of Maidstone urban area. A threshold of 400 sq.m gross (GEA) could be considered in line with the Sunday trading limit (280 sq.m net).

Appendix 1 Town centre uses study area



Appendix 2 Convenience Goods Capacity

Table 1 - Study area population

Zone	2017	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	108,452	112,099	116,014	121,913	127,285	132,300	137,513
Zone 2 - Maidstone Rural	59,000	60,802	62,636	65,652	68,332	70,811	73,380
Zone 3 - Swale	121,099	124,762	128,796	135,128	140,942	146,484	152,244
Zone 4 - Medway	141,130	144,997	149,138	155,612	161,661	167,467	173,482
Zone 5 - Tonbridge/Malling	81,914	84,733	87,367	91,528	95,308	98,787	102,393
Zone 6 - Tunbridge/Ashford Rural	47,321	48,633	49,611	51,229	52,727	54,102	55,513
Total	558,916	576,026	593,562	621,062	646,255	669,951	694,525

Sources:

*Experian Population Projections (2017 base)***Table 2 - Convenience goods expenditure per person per annum (£)**

Zone	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	2,120	2,115	2,101	2,103	2,107	2,110
Zone 2 - Maidstone Rural	2,602	2,596	2,579	2,581	2,585	2,590
Zone 3 - Swale	2,203	2,198	2,183	2,185	2,189	2,192
Zone 4 - Medway	2,151	2,145	2,131	2,133	2,137	2,140
Zone 5 - Tonbridge/Malling	2,319	2,313	2,298	2,300	2,304	2,308
Zone 6 - Tunbridge/Ashford Rural	2,710	2,704	2,686	2,688	2,692	2,697

Sources:

*Experian local expenditure estimates and growth rates February 2020 (Retail Planner Briefing Note 17)**Data at 2017 prices**Excludes Special Forms of Trading (SFT)***Table 3 - Total convenience goods expenditure (£m)**

Zone	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	237.65	245.37	256.14	267.68	278.76	290.15
Zone 2 - Maidstone Rural	158.21	162.60	169.32	176.36	183.05	190.05
Zone 3 - Swale	274.85	283.09	294.98	307.96	320.65	333.72
Zone 4 - Medway	311.89	319.90	331.61	344.82	357.88	371.25
Zone 5 - Tonbridge/Malling	196.50	202.08	210.33	219.21	227.61	236.32
Zone 6 - Tunbridge/Ashford Rural	131.80	134.15	137.60	141.73	145.64	149.72
Study Area Total	1,310.89	1,347.20	1,399.98	1,457.77	1,513.58	1,571.22

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey August 2019 (weighted results)

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

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	237.65	158.21	274.85	311.89	196.50	131.80	1,310.89
Sainsbury's, Romney Place, Maidstone	15.92	6.64	0.00	0.62	0.79	0.00	23.98
Other Maidstone town centre	9.98	7.12	0.00	0.62	1.57	0.92	20.22
Aldi, Langely Park Centre	15.92	12.50	1.65	0.00	6.29	2.90	39.26
Aldi, Well Road, Maidstone	9.03	1.27	0.00	2.18	1.77	0.40	14.64
Lidl, Broadway Shopping Centre	8.08	0.32	0.00	0.94	2.75	0.00	12.08
Lidl, Farleigh Hill	7.84	4.43	0.00	1.56	1.18	0.40	15.41
Morrisons, St. Saviour's Road	32.56	13.29	0.00	0.00	0.00	1.85	47.69
Tesco, Farleigh Hill	6.18	14.08	0.00	2.18	0.59	0.00	23.03
Tesco, The Minor Centre, Weaving	25.67	20.88	0.00	0.00	3.93	0.00	50.48
Waitrose, Midkent Shopping Centre	19.72	0.00	0.55	0.62	1.96	0.00	22.86
Other Maidstone urban area	13.55	4.27	0.00	0.00	0.59	0.00	18.41
Other Maidstone Borough large stores	26.62	19.46	0.00	1.87	0.39	0.79	49.13
Other Maidstone Borough	7.37	7.91	0.00	0.00	0.39	0.00	15.67
Maidstone Borough Total	198.44	112.17	2.20	10.60	22.20	7.25	352.86
Medway	1.43	5.70	5.77	291.30	23.58	0.92	328.70
Sittingbourne	0.48	4.90	177.28	2.18	0.39	0.00	185.23
Faversham	0.00	0.00	12.92	0.00	0.00	0.00	12.92
Ashford	0.48	5.06	0.55	0.00	0.98	10.94	18.01
Tonbridge	0.00	8.86	0.00	0.00	13.17	42.44	64.46
Tunbridge Wells	1.66	2.06	0.00	2.50	3.54	30.71	40.46
Aylesford/West Malling	32.80	8.70	0.00	0.00	86.85	0.40	128.74
Elsewhere	2.38	10.76	76.13	5.30	45.78	39.14	179.50
Other Total	39.21	46.04	272.65	301.28	174.29	124.55	958.03
TOTAL	237.65	158.21	274.85	311.89	196.50	131.80	1,310.89

Source: Tables 3 and 4

Table 6 - Future 2022 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2022	245.37	162.60	283.09	319.90	202.08	134.15	1,347.20
Maidstone urban area	169.80	87.16	2.26	8.96	22.03	6.57	296.77
Other Maidstone Borough	35.09	28.13	0.00	1.92	0.81	0.80	66.75
Maidstone Borough Total	204.88	115.29	2.26	10.88	22.84	7.38	363.52
Outside Maidstone Borough	40.49	47.32	280.83	309.02	179.24	126.77	983.67
TOTAL	245.37	162.60	283.09	319.90	202.08	134.15	1,347.20

Source: Tables 3 and 4

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

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	256.14	169.32	294.98	331.61	210.33	137.60	1,399.98
Maidstone urban area	177.25	90.75	2.36	9.29	22.93	6.74	309.32
Other Maidstone Borough	36.63	29.29	0.00	1.99	0.84	0.83	69.58
Maidstone Borough Total	213.88	120.05	2.36	11.27	23.77	7.57	378.89
Outside Maidstone Borough	42.26	49.27	292.62	320.33	186.56	130.03	1,021.09
TOTAL	256.14	169.32	294.98	331.61	210.33	137.60	1,399.98

Source: Tables 3 and 4

Table 8 - Future 2032 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	267.68	176.36	307.96	344.82	219.21	141.73	1,457.77
Maidstone urban area	185.23	94.53	2.46	9.66	23.89	6.94	322.72
Other Maidstone Borough	38.28	30.51	0.00	2.07	0.88	0.85	72.59
Maidstone Borough Total	223.51	125.04	2.46	11.72	24.77	7.80	395.31
Outside Maidstone Borough	44.17	51.32	305.49	333.10	194.44	133.94	1,062.46
TOTAL	267.68	176.36	307.96	344.82	219.21	141.73	1,457.77

Source: Tables 3 and 4

Table 9 - Future 2037 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	278.76	183.05	320.65	357.88	227.61	145.64	1,513.58
Maidstone urban area	192.90	98.11	2.57	10.02	24.81	7.14	335.54
Other Maidstone Borough	39.86	31.67	0.00	2.15	0.91	0.87	75.46
Maidstone Borough Total	232.76	129.78	2.57	12.17	25.72	8.01	411.00
Outside Maidstone Borough	45.99	53.27	318.09	345.71	201.89	137.63	1,102.58
TOTAL	278.76	183.05	320.65	357.88	227.61	145.64	1,513.58

Source: Tables 3 and 4

Table 10 - Future 2042 convenience goods expenditure patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	290.15	190.05	333.72	371.25	236.32	149.72	1,571.22
Maidstone urban area	200.79	101.87	2.67	10.40	25.76	7.34	348.81
Other Maidstone Borough	41.49	32.88	0.00	2.23	0.95	0.90	78.44
Maidstone Borough Total	242.28	134.75	2.67	12.62	26.70	8.23	427.26
Outside Maidstone Borough	47.88	55.31	331.05	358.63	209.62	141.48	1,143.96
TOTAL	290.15	190.05	333.72	371.25	236.32	149.72	1,571.22

Source: Tables 3 and 4

Table 11 - Convenience goods floorspace in Maidstone Borough main settlements (2017 prices)

Area/Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Maidstone town centre					
Sainsbury's, Romney Place	2,973	85%	2,527	£11,691	£29.54
Co-op, Week Street	342	95%	325	£10,824	£3.52
Iceland, Chequers Shopping Centre	588	98%	576	£6,859	£3.95
M&S Foodhall, Week Street	460	98%	451	£10,476	£4.72
McColls, High Street	118	98%	116	£7,000	£0.81
Tesco Express, Week Street	254	98%	249	£13,797	£3.43
Other town centre	3,395	100%	3,395	n/a	n/a
	8,130		7,639		£45.98
Maidstone urban					
Aldi, Langley Park Centre	1,205	85%	1,024	£10,827	£11.09
Aldi, Well Road	948	85%	806	£10,827	£8.72
Home Bargains, London Road Retail Park	757	25%	189	£3,747	£0.71
Iceland, London Road Retail Park	819	98%	803	£6,859	£5.51
Lidl, Broadway Shopping Centre	1,767	85%	1,502	£10,103	£15.17
Lidl, Farleigh Hill	1,630	85%	1,386	£10,103	£14.00
M&S Simply Food (BP), London Road	83	98%	81	£10,476	£0.85
Morrisons, St Saviours Road	4,223	75%	3,167	£12,656	£40.08
Sainsbury's Local, Loose Road	245	98%	240	£11,691	£2.81
Tesco Express (Esso), Tonbridge Road	116	98%	114	£13,797	£1.57
Tesco Express, London Road	140	98%	137	£13,797	£1.89
Tesco Express, Loose Road	247	98%	242	£13,797	£3.34
Tesco, Farleigh Hill	1,273	90%	1,146	£13,797	£15.81
Tesco, The Minor Centre	3,068	85%	2,608	£13,797	£35.98
Waitrose, Mid Kent Shopping Centre	1,147	90%	1,032	£12,940	£13.36
	17,668		14,477		£170.89
Maidstone Borough Other					
Co-op, Buckingham Drive, Harrietsham	342	98%	335	£10,824	£3.63
Sainsbury's Local, High Street, Headcorn	254	98%	249	£11,691	£2.91
M&S Simply Food (BP), Lenham	84	98%	82	£10,476	£0.86
Co-op, Faversham Road, Lenham	232	98%	227	£10,824	£2.46
McColls, Honywood Road, Lenham	115	98%	113	£7,000	£0.79
McColls, High Street, Staplehurst	72	98%	71	£7,000	£0.49
McColls, Wallis Avenue	166	98%	163	£7,000	£1.14
McColls, Egremont Avenue	132	98%	129	£7,000	£0.91
McColls, Boxley Road	49	98%	48	£7,000	£0.34
Sainsbury's Local, Tonbridge Road	236	98%	231	£11,691	£2.70
Tesco Express, Hermitage Walk	201	98%	197	£13,797	£2.72
Tesco Express (Esso), Ashford Road	116	98%	114	£13,797	£1.57
Co-op, Egremont Road	354	98%	347	£10,824	£3.76
Co-op, Willington Street	156	98%	153	£10,824	£1.65
Co-op, Northumberland Road	107	98%	105	£10,824	£1.14
M&S Simply Food, Heritage Lane	721	98%	707	£10,476	£7.40
Other village shops	1,230	100%	1,230	n/a	n/a
	4,567		4,500		£34.46
TOTAL	30,365		26,616		£251.33

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

Table 12 - Summary of Convenience Goods Expenditure 2019 to 2037 (£M)

	2019	2022	2027	2032	2037	2042
Available expenditure						
Maidstone urban area	288.06	296.77	309.32	322.72	335.54	348.81
Other Maidstone Borough	64.80	66.75	69.58	72.59	75.46	78.44
Total	352.86	363.52	378.89	395.31	411.00	427.26
Turnover of existing/proposed facilities						
Maidstone urban area (1)	288.06	299.56	299.56	299.56	299.56	299.56
Other Maidstone Borough	64.80	64.80	64.80	64.80	64.80	64.80
Total	352.86	364.36	364.36	364.36	364.36	364.36
Surplus/deficit expenditure						
Maidstone urban area	0.00	-2.79	9.76	23.16	35.98	49.25
Other Maidstone Borough	0.00	1.95	4.77	7.78	10.66	13.64
Total	0.00	-0.84	14.53	30.95	46.64	62.89

Source: Tables 5 to 11

Notes

(1) M&S store Eclipse Park added at 2022, Convenience goods turnover = £11.5 million (from applicant's RIA)

Table 13 - Convenience goods floorspace capacity up to 2037 (sq.m)

	2022	2027	2032	2037	2037
Turnover density new floorspace (£ per sq.m)	£11,000	£11,000	£11,000	£11,000	£11,000
Sales floorspace projection (sq.m net)					
Maidstone urban area	-253	887	2,106	3,271	4,478
Other Maidstone Borough	177	434	708	969	1,240
Total	-76	1,321	2,813	4,240	5,718
Floorspace projection (sq.m gross) *					
Maidstone urban area	-362	1,267	3,008	4,673	6,397
Other Maidstone Borough	253	620	1,011	1,384	1,771
Total	-109	1,887	4,019	6,057	8,168

Source: Table 12

* Net to gross ratio of 70%.

Appendix 3 Comparison Goods Capacity

Table 1 - Study area population

Zone	2017	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	108,452	112,099	116,014	121,913	127,285	132,300	137,513
Zone 2 - Maidstone Rural	59,000	60,802	62,636	65,652	68,332	70,811	73,380
Zone 3 - Swale	121,099	124,762	128,796	135,128	140,942	146,484	152,244
Zone 4 - Medway	141,130	144,997	149,138	155,612	161,661	167,467	173,482
Zone 5 - Tonbridge/Malling	81,914	84,733	87,367	91,528	95,308	98,787	102,393
Zone 6 - Tunbridge/Ashford Rural	47,321	48,633	49,611	51,229	52,727	54,102	55,513
Total	558,916	576,026	593,562	621,062	646,255	669,951	694,525

Sources:

*Experian Population Projections (2017 base)***Table 2 - Comparison goods expenditure per person per annum (£)**

Zone	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	3,396	3,626	4,062	4,605	5,275	6,074
Zone 2 - Maidstone Rural	4,480	4,783	5,359	6,075	6,958	8,012
Zone 3 - Swale	3,455	3,689	4,133	4,685	5,366	6,179
Zone 4 - Medway	3,348	3,575	4,005	4,540	5,200	5,988
Zone 5 - Tonbridge/Malling	4,033	4,306	4,824	5,469	6,264	7,213
Zone 6 - Tunbridge/Ashford Rural	4,562	4,871	5,457	6,186	7,085	8,158

Sources:

*Experian Local Expenditure 2017 (2017 prices)**Experian Retail Planner Briefing Note 17 (February 2020) growth rates**Excludes Special Forms of Trading (SFT)***Table 3 - Total comparison goods expenditure (£m)**

Zone	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	368.30	406.47	471.25	561.41	671.43	803.59
Zone 2 - Maidstone Rural	264.32	290.82	335.67	398.84	475.45	567.34
Zone 3 - Swale	418.40	460.25	532.31	633.07	756.29	905.12
Zone 4 - Medway	472.50	518.36	597.30	706.48	840.64	1002.79
Zone 5 - Tonbridge/Malling	330.36	364.86	421.46	500.57	597.01	712.55
Zone 6 - Tunbridge Wells/Ashford Rural	215.88	236.89	270.73	316.90	373.57	441.36
Study Area Total	2,069.76	2,277.65	2,628.71	3,117.27	3,714.39	4,432.76

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey August 2019 (weighted results)

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

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	368.30	264.32	418.40	472.50	330.36	215.88	2,069.76
Maidstone town centre	173.84	93.83	53.97	45.36	78.30	20.08	465.38
Maidstone out of centre urban area	46.04	20.35	3.77	10.87	14.21	1.94	97.17
Other Maidstone Borough	7.73	11.37	0.00	0.47	2.31	0.65	22.53
Maidstone Borough Total	227.61	125.55	57.74	56.70	94.81	22.67	585.08
Canterbury	4.79	2.11	20.92	1.89	3.63	2.59	35.94
Medway	8.47	11.10	43.09	267.91	33.70	0.00	364.27
Sittingbourne	2.58	8.72	164.43	6.14	0.00	0.00	181.87
Ashford	8.84	19.03	6.28	3.78	7.60	11.66	57.18
Tonbridge	2.21	2.11	0.00	0.00	13.21	14.68	32.22
Tunbridge Wells	4.42	14.01	0.00	0.00	15.20	98.87	132.50
Aylesford	53.77	39.38	9.62	7.56	62.77	1.51	174.62
Bluewater Shopping Centre	34.25	23.00	43.93	77.02	62.77	2.81	243.77
Other outside the Borough	21.36	19.30	72.38	51.50	36.67	61.09	262.31
Other Total	140.69	138.77	360.66	415.80	235.55	193.21	1,484.68
TOTAL	368.30	264.32	418.40	472.50	330.36	215.88	2,069.76

Source: Tables 3 and 4

Table 6 - Future 2022 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2022	406.47	290.82	460.25	518.36	364.86	236.89	2,277.65
Maidstone urban area	242.66	125.63	63.51	61.69	102.16	24.16	619.82
Other Maidstone Borough	8.54	12.51	0.00	0.52	2.55	0.71	24.82
Maidstone Borough Total	251.20	138.14	63.51	62.20	104.71	24.87	644.64
Outside Maidstone Borough	155.27	152.68	396.73	456.16	260.15	212.02	1,633.01
TOTAL	406.47	290.82	460.25	518.36	364.86	236.89	2,277.65

Source: Tables 3 and 4

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

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	471.25	335.67	532.31	597.30	421.46	270.73	2,628.71
Maidstone urban area	281.34	145.01	73.46	71.08	118.01	27.61	716.50
Other Maidstone Borough	9.90	14.43	0.00	0.60	2.95	0.81	28.69
Maidstone Borough Total	291.23	159.44	73.46	71.68	120.96	28.43	745.19
Outside Maidstone Borough	180.02	176.22	458.85	525.62	300.50	242.30	1,883.52
TOTAL	471.25	335.67	532.31	597.30	421.46	270.73	2,628.71

Source: Tables 3 and 4

Table 8 - Future 2032 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	561.41	398.84	633.07	706.48	500.57	316.90	3,117.27
Maidstone urban area	335.16	172.30	87.36	84.07	140.16	32.32	851.38
Other Maidstone Borough	11.79	17.15	0.00	0.71	3.50	0.95	34.10
Maidstone Borough Total	346.95	189.45	87.36	84.78	143.66	33.27	885.48
Outside Maidstone Borough	214.46	209.39	545.71	621.70	356.90	283.63	2,231.79
TOTAL	561.41	398.84	633.07	706.48	500.57	316.90	3,117.27

Source: Tables 3 and 4

Table 9 - Future 2037 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	671.43	475.45	756.29	840.64	597.01	373.57	3,714.39
Maidstone urban area	400.84	205.40	104.37	100.04	167.16	38.10	1,015.91
Other Maidstone Borough	14.10	20.44	0.00	0.84	4.18	1.12	40.68
Maidstone Borough Total	414.94	225.84	104.37	100.88	171.34	39.22	1,056.60
Outside Maidstone Borough	256.49	249.61	651.93	739.76	425.67	334.35	2,657.80
TOTAL	671.43	475.45	756.29	840.64	597.01	373.57	3,714.39

Source: Tables 3 and 4

Table 10 - Future 2042 comparison goods expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	803.59	567.34	905.12	1,002.79	712.55	441.36	4,432.76
Maidstone urban area	479.74	245.09	124.91	119.33	199.51	45.02	1,213.61
Other Maidstone Borough	16.88	24.40	0.00	1.00	4.99	1.32	48.59
Maidstone Borough Total	496.62	269.49	124.91	120.34	204.50	46.34	1,262.19
Outside Maidstone Borough	306.97	297.85	780.22	882.46	508.05	395.02	3,170.57
TOTAL	803.59	567.34	905.12	1,002.79	712.55	441.36	4,432.76

Source: Tables 3 and 4

Table 11 - Comparison goods sales floorspace in Maidstone town centre and out of centre stores

Area	Gross Floorspace Sq.M	Sales Floorspace Sq.M Net
Maidstone urban area		
Maidstone town centre comparison shops	63,350	47,513
Maidstone town centre food stores	n/a	491
London Road Retail Park	5,464	4,644
St Peters Wharf Retail Park	9,581	8,144
Wickes Extra, St Peters Road	5,817	5,235
B&Q, Barker Road	3,332	2,602
Next, Eclipse Park	5,976	4,791
Maidstone out of centre food stores	n/a	3,191
Maidstone urban area total	93,520	76,611

Source: Maidstone Goad Plan Oct 2017 (updated Feb 2019), VOA, Completely Retail.

Table 12 - Summary of comparison goods expenditure 2019 to 2037 (£M)

	2019	2022	2027	2032	2037	2042
Available Expenditure						
Maidstone urban area	562.55	619.82	716.50	851.38	1,015.91	1,213.61
Other Maidstone Borough	22.53	24.82	28.69	34.10	40.68	48.59
Total	585.08	644.64	745.19	885.48	1,056.60	1,262.19
Turnover of Existing Facilities						
Maidstone urban area (1)	562.55	663.60	773.03	883.18	1,009.03	1,152.80
Other Maidstone Borough	22.53	24.96	29.07	33.22	37.95	43.36
Total	585.08	688.56	802.11	916.40	1,046.98	1,196.16
Surplus Expenditure (£m)						
Maidstone urban area	0.00	-43.78	-56.53	-31.81	6.88	60.80
Other Maidstone Borough	0.00	-0.13	-0.38	0.88	2.74	5.23
Total	0.00	-43.92	-56.91	-30.92	9.62	66.03

Source: Tables 5 to 10 and Experian growth in retail sales densities (Figure 4b - Retail Planner Briefing Note 17)

(1) M&S store at Eclipse Park added at 2022. Comparison goods turnover of £40.5 million (from applicant's RIA)

Table 13 - Maidstone comparison goods floorspace capacity up to 2037

	2019	2022	2027	2032	2037	2038
Turnover density new floorspace (£ per sq.m) (1)	£7,000	£7,753	£9,032	£10,319	£11,789	£13,469
Floorspace Projection (sq.m net)						
Maidstone urban area	0	-5,647	-6,259	-3,082	584	4,514
Other Maidstone Borough	0	-17	-43	86	232	388
Total	0	-5,664	-6,301	-2,997	816	4,902
Floorspace Projection (sq.m gross) (2)						
Maidstone urban area	0	-7,059	-7,823	-3,853	730	5,643
Other Maidstone Borough	0	-22	-53	107	290	485
Total	0	-7,081	-7,877	-3,746	1,020	6,128

Source: Table 12 and Experian growth in retail sales densities (Figure 4b - Retail Planner Briefing Note 17)

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

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

Appendix 4 Food and Beverage Capacity

Table 1 - Study area population

Zone	2017	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	108,452	112,099	116,014	121,913	127,285	132,300	137,513
Zone 2 - Maidstone Rural	59,000	60,802	62,636	65,652	68,332	70,811	73,380
Zone 3 - Swale	121,099	124,762	128,796	135,128	140,942	146,484	152,244
Zone 4 - Medway	141,130	144,997	149,138	155,612	161,661	167,467	173,482
Zone 5 - Tonbridge/Malling	81,914	84,733	87,367	91,528	95,308	98,787	102,393
Zone 6 - Tunbridge/Ashford Rural	47,321	48,633	49,611	51,229	52,727	54,102	55,513
Total	558,916	576,026	593,562	621,062	646,255	669,951	694,525

Sources:

*Experian Population Projections (2017 base)***Table 2 - Food and beverage expenditure per person per annum (£)**

	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	1,149	1,184	1,256	1,327	1,401	1,575
Zone 2 - Maidstone Rural	1,368	1,410	1,496	1,580	1,668	1,875
Zone 3 - Swale	1,076	1,110	1,177	1,243	1,313	1,475
Zone 4 - Medway	1,127	1,162	1,232	1,302	1,375	1,545
Zone 5 - Tonbridge/Malling	1,250	1,289	1,367	1,444	1,525	1,715
Zone 6 - Tunbridge/Ashford Rural	1,374	1,417	1,502	1,587	1,676	1,884

Sources:

*Experian Local Expenditure 2017 (2017 prices)**Experian Retail Planner Briefing Note 17 (February 2020)***Table 3 - Total food and beverage expenditure (£m)**

	2019	2022	2027	2032	2037	2042
Zone 1 - Maidstone Central	128.80	137.36	153.12	168.91	185.35	216.58
Zone 2 - Maidstone Rural	83.18	88.32	98.22	107.96	118.11	137.59
Zone 3 - Swale	134.24	142.96	159.05	175.19	192.33	224.56
Zone 4 - Medway	163.41	173.30	191.71	210.48	230.27	268.03
Zone 5 - Tonbridge/Malling	105.92	112.62	125.12	137.62	150.65	175.60
Zone 6 - Tunbridge/Ashford Rural	66.82	70.30	76.95	83.68	90.68	104.59
Study Area Total	682.37	724.85	804.16	883.85	967.39	1,126.95

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey August 2019 (weighted results)

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

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2019	128.80	83.18	134.24	163.41	105.92	66.82	682.37
Maidstone urban area	95.57	41.51	14.50	22.22	23.73	1.60	199.13
Other Maidstone Borough	15.07	18.88	3.36	1.63	1.91	1.60	42.45
Maidstone Borough Total	110.64	60.39	17.85	23.86	25.63	3.21	241.58
Canterbury	3.61	0.25	4.56	1.31	0.95	0.00	10.68
Medway	0.26	1.50	5.37	78.93	8.90	0.00	94.95
Sittingbourne	0.00	3.66	54.23	3.60	0.00	0.00	61.49
Faversham	0.26	0.00	4.43	0.82	0.64	0.40	6.54
Ashford	1.42	2.16	3.36	0.00	0.00	1.27	8.21
Tonbridge	0.64	0.00	0.00	0.00	2.33	3.14	6.11
Tunbridge Wells	0.00	2.16	0.00	0.00	4.02	19.71	25.90
Aylesford	1.03	0.25	0.00	0.00	6.25	0.00	7.53
Bluewater Shopping Centre	2.58	1.00	5.24	10.13	5.72	0.47	25.13
West Malling	0.00	0.58	0.00	0.82	22.67	0.00	24.07
Other outside the Borough	8.37	11.23	39.20	43.96	28.81	38.62	170.19
Other Total	18.16	22.79	116.39	139.55	80.28	63.61	440.79
TOTAL	128.80	83.18	134.24	163.41	105.92	66.82	682.37

Source: Tables 3 and 4

Table 6 - Future 2022 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2022	137.36	88.32	142.96	173.30	112.62	70.30	724.85
Maidstone urban area	101.92	44.07	15.44	23.57	25.23	1.69	211.91
Other Maidstone Borough	16.07	20.05	3.57	1.73	2.03	1.69	45.14
Maidstone Borough Total	117.99	64.12	19.01	25.30	27.25	3.37	257.05
Outside Maidstone Borough	19.37	24.20	123.95	148.00	85.36	66.92	467.80
TOTAL	137.36	88.32	142.96	173.30	112.62	70.30	724.85

Source: Tables 3 and 4

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

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2027	153.12	98.22	159.05	191.71	125.12	76.95	804.16
Maidstone urban area	113.62	49.01	17.18	26.07	28.03	1.85	235.75
Other Maidstone Borough	17.92	22.29	3.98	1.92	2.25	1.85	50.20
Maidstone Borough Total	131.53	71.30	21.15	27.99	30.28	3.69	285.95
Outside Maidstone Borough	21.59	26.91	137.89	163.72	94.84	73.25	518.21
TOTAL	153.12	98.22	159.05	191.71	125.12	76.95	804.16

Source: Tables 3 and 4

Table 8 - Future 2032 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2032	168.91	107.96	175.19	210.48	137.62	83.68	883.85
Maidstone urban area	125.33	53.87	18.92	28.63	30.83	2.01	259.59
Other Maidstone Borough	19.76	24.51	4.38	2.10	2.48	2.01	55.24
Maidstone Borough Total	145.09	78.38	23.30	30.73	33.31	4.02	314.83
Outside Maidstone Borough	23.82	29.58	151.89	179.75	104.32	79.66	569.02
TOTAL	168.91	107.96	175.19	210.48	137.62	83.68	883.85

Source: Tables 3 and 4

Table 9 - Future 2037 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2037	185.35	118.11	192.33	230.27	150.65	90.68	967.39
Maidstone urban area	137.53	58.94	20.77	31.32	33.75	2.18	284.48
Other Maidstone Borough	21.69	26.81	4.81	2.30	2.71	2.18	60.50
Maidstone Borough Total	159.22	85.75	25.58	33.62	36.46	4.35	344.98
Outside Maidstone Borough	26.13	32.36	166.75	196.65	114.19	86.33	622.42
TOTAL	185.35	118.11	192.33	230.27	150.65	90.68	967.39

Source: Tables 3 and 4

Table 10 - Future 2042 food and beverage expenditure patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Expenditure 2042	216.58	137.59	224.56	268.03	175.60	104.59	1,126.95
Maidstone urban area	160.70	68.66	24.25	36.45	39.34	2.51	331.91
Other Maidstone Borough	25.34	31.23	5.61	2.68	3.16	2.51	70.54
Maidstone Borough Total	186.04	99.89	29.87	39.13	42.50	5.02	402.45
Outside Maidstone Borough	30.54	37.70	194.69	228.90	133.11	99.57	724.50
TOTAL	216.58	137.59	224.56	268.03	175.60	104.59	1,126.95

Source: Tables 3 and 4

Table 11 - Food and beverage facilities in main Maidstone settlements (number of outlets)

Area	Class A3	Class A4	Class A5	Total
Maidstone town centre	60	25	16	101
Other Maidstone urban area	14	19	12	45
Harrietsham	1	1	0	2
Headcorn	5	2	3	10
Lenham	3	2	1	6
Marden	0	2	2	4
Staplehurst	1	2	2	5
Boughton Monchelsea	0	2	0	2
Coxheath	2	0	4	6
Eyehorne Street	0	2	0	2
Sutton Valence	0	3	0	3
Yalding	2	2	0	4
TOTAL	88	62	40	190

Source: Maidstone Goad Plan Oct 2017 (updated Feb 2019) and Lichfields' site survey (Feb 2019)

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

Area	2019	2022	2027	2032	2037	2042
Available expenditure						
Maidstone urban area	199.13	211.91	235.75	259.59	284.48	331.91
Other Maidstone Borough	42.45	45.14	50.20	55.24	60.50	70.54
Total	241.58	257.05	285.95	314.83	344.98	402.45
Turnover of existing facilities (1)						
Maidstone urban area (2)	199.13	206.69	217.23	228.32	239.96	252.20
Other Maidstone Borough	42.45	43.74	45.97	48.31	50.78	53.37
Total	241.58	250.43	263.20	276.63	290.74	305.57

Source: Tables 5 to 10

(1) turnover density of existing floorspace increased at 1% per annum

(2) M&S store at Eclipse Park - café added at 2022 (297 sq.m at £5,152 - £1.53 million)

Table 13 - Food and Beverage Floorspace Capacity up to 2037

	2019	2022	2027	2032	2037	2042
Surplus/Deficit Expenditure (£m)						
Maidstone urban area	0.00	5.22	18.52	31.27	44.52	79.71
Other Maidstone Borough	0.00	1.40	4.23	6.93	9.72	17.17
TOTAL	0.00	6.62	22.75	38.20	54.24	96.88
Turnover Density New Floorspace (£ per sq.m) (1)	£5,000	£5,152	£5,414	£5,690	£5,981	£6,286
Floorspace Projection (sq.m gross)						
Maidstone urban area	0	1,014	3,420	5,495	7,444	12,681
Other Maidstone Borough	0	272	782	1,217	1,625	2,731
TOTAL	0	1,286	4,202	6,712	9,069	15,412

Source: Table 12

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

Appendix 5 Experian Data Guide

Data Guide

UK Regional Planning Service
September 2019



Our main subscription website:
<https://analyticsondemand.experian.co.uk/>



Data Guide

UK Regional Planning Service
September 2019

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Executive summary

This document outlines the current variable coverage in the September 2019 version of the UK Regional Planning Service, and the methodology behind the history and forecast.

[Appendix A](#) includes a glossary of terms.

[Appendix B](#) includes our definitions of the sectors.

[Appendix C](#) has the geography definitions.

[Appendix D](#) contains the most common Frequently Asked Questions

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1 Variable Coverage

To avoid implying spurious accuracy, we now round all county and local series to the nearest tenth of a unit. This means that people or job counts are now to the nearest 100 people or jobs and money counts are to the nearest £100,000, and rates are now to the nearest 0.1 percentage points. Forecasts for series with very small levels may appear to be very volatile when growth rates are considered. We, therefore, recommend viewing series with small values in levels not growth rates or considering growth rates over longer intervals than annually. Very small levels have been set to zero as they are essentially statistical artefacts.

Figure 1.1: Variable coverage in the RPS

- ✓ indicates that the variable is available in both the search query tool and the xls files.
- Xls indicates that the variable is available in the xls but not the search query tool.
- UK monthly forecast indicates that the variable is not produced as part of the RPS but can be found in the monthly UK macro forecast on our website.

Variable	UK	Region	County & Local Authority
PRODUCTION			
GDP	UK monthly forecast		
GDP by component of demand	UK monthly forecast		
Gross Value Added	✓	✓	✓
GVA by sectors	✓	✓	✓
LABOUR MARKET			
Employees by sector	✓	✓	✓
Self-employed by sector	✓	✓	✓
Government Trainees by sector	xls	xls	Upon request
Her Majesties Forces Total	xls	xls	Upon request
FTE Employment by sector	✓	✓	✓
Total ILO Employment – Residence based & Workplace based	✓	✓	✓
ILO Unemployment	✓	✓	✓
Unemployment rate	✓	✓	✓
Labour Force	xls	xls	Upon request
Activity Rate	xls	xls	Upon request
Inactivity Rate	xls	xls	Upon request
DEMOGRAPHICS			
Population: Total, Adult (16+)	✓	✓	✓
Age bands: 0-15, State Working age, State retirement 16-64, 65+	✓	✓	✓
Population by single or 5 year age band	Upon request	Upon request	Upon request
HOUSEHOLDS			
Nominal disposable Income	✓	✓	✓
Real disposable income	✓	✓	✓
Nominal income by component	xls	xls	Upon request
Nominal consumer spending	✓	✓	✓
Real consumer spending	✓	✓	✓
Consumer spending by COICOP category	Upon request	Upon request	
Cost of Living Index	✓	✓	
House price Index	✓	✓	Upon request
Hours worked	Upon request	Upon request	Upon request

Please note we are no longer publishing Claimant Count for Regional and Local Areas. This is due to the fact that complete data are no longer available due to the shift to Universal Credit.

2 Historical End-points

Figure 1.2: Last historic data point

Variable	UK*	Region	County & Local Authority
Gross Value Added	2019q2	2017q4	2017q4
GVA by sectors	2019q2	2017q4	2017q4
Labour market variables	2019q1	2019q1	2018q3
Income	2019q1	2017q4	2016q4
Consumer spending	2019q2	2018q4	2016q4

The historical end-point represents the last period in time for which we apply our processes to collect, calculate or derive data, details of which can be found in chapter 3: Methodology. All time-periods that are in the past but follow the historical end-point are Experian Economics' estimates.

We have not used any regional data published after July 2019 in producing this update of the RPS. It is possible that between this date and the release of the RPS some new history may have been released and/or revised.

Population

The population data provided are the Office for National Statistics (ONS) 2016 mid-year estimates for 1997-2016. For England, Scotland and Wales, the 2016-based national population projections are used while 2016-based sub-national population projections for England and Scotland have been used for the first time. Sub-national projections for Wales remain 2014-based. Further information on population changes is available in [section 4](#).

UK forecast

This forecast is consistent with an Experian Economics' August 2019 macroeconomic forecast which includes GVA for 2019q2. We explore this further in [section 4](#).

Geographic boundaries

As communicated in previous data guides, we publish data on post-2009 local authority boundaries.

With the ONS gradually phasing out the publication of data on the pre-2009 local authority boundaries, it had become increasingly less credible for Experian to publish up-to-date historical data on these definitions. The table below shows those local authorities which no longer exist as individual entities (2nd column) and the name of the new local authority that has been created by their merger.

Region	Disbanded local authorities	Merged to form:
<i>North East</i>	Chester-le-Street, Derwentside, Durham, Easington, Sedgefield, Teesdale, Wear Valley	County Durham
	Alnwick, Berwick-upon-Tweed, Blyth Valley, Castle Morpeth, Tynedale, Wansbeck	Northumberland
<i>North West</i>	Congleton, Crewe & Nantwich, Macclesfield	Cheshire East
	Chester, Ellesmere Port & Neston, Vale Royal	Cheshire West & Chester
<i>West Midlands</i>	Bridgnorth, North Shropshire, Oswestry, Shrewsbury & Atcham, South Shropshire	Shropshire
<i>East of England:</i>	Mid Bedfordshire, South Bedfordshire	Central Bedfordshire
<i>South West</i>	Caradon, Carrick, Kerrier North Cornwall, Penwith, Restormel	Cornwall
	Kennet, North Wiltshire, Salisbury, West Wiltshire	Wiltshire

3 Methodology

3.1 UK Methodology

The approach for the regional planning service takes the UK variables as exogenous, imposed from the monthly UK forecast.

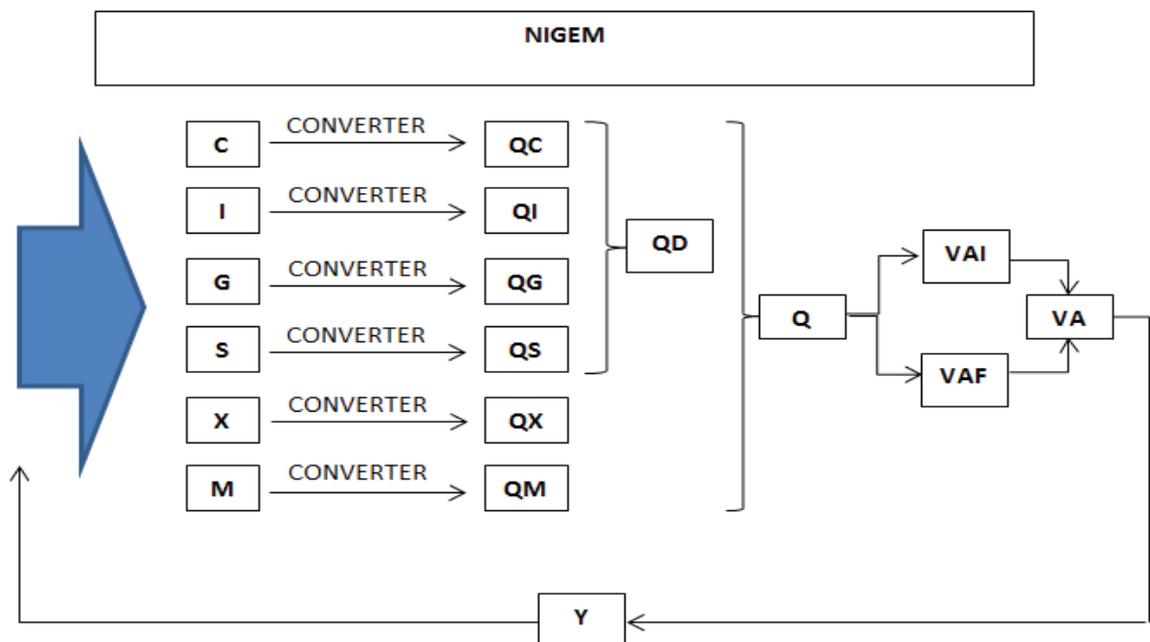
To produce the UK forecast we use a heavily customised version of the National Institute of Social & Economic Research's (NISER) model called NIGEM to provide our core macroeconomic forecast.

NIGEM is a general equilibrium model of the UK and World economy which forecasts, amongst other variables, aggregate GVA, expenditure, income and employment based on the UK National Accounts published by the Office of National Statistics.

To split this core forecast out into industries and sub-sectors we have a Sectoral Model which expands on the forecasts from the core NIGEM model.

We disaggregate total consumption (C), investment (I), government spending (G), stocks (S), exports (X) and imports (M) from NIGEM to a finer level of detail. This provides a highly detailed model of demand (Q) for industry GVA in the UK economy. Using converters derived from the ONS Supply and Use Tables, we convert demand into intermediate (VAI) and final (VAF) value added for each sector. This provides a comprehensive view of how value added is distributed across sectors. The growth rate of total value added (VA) for each industry determines its GVA (Y) growth rate. GVA is constrained in order to forecast total GVA from NIGEM. This Input-Output based model is iterative and captures intra-industry demand.

The industry GVA forecast is used together with wage forecasts to forecast employment by sector (E).



3.2 Regional methodology

3.2.1 History

All economic history used in the RPS is derived from official statistics published by the UK's Office for National Statistics (ONS). Our approach is to use existing statistics in the form they are published to the greatest extent possible. However, this is subject to the following exceptions:

- where there is a lag between an update of aggregate data and the corresponding disaggregation, the disaggregate data is constrained to match the latest aggregates;
- where ONS data is not published at quarterly frequency (for instance it is only annual data), we use a consistent methodology (described below) to construct quarterly data;
- where ONS data is not published at the geography required or in the detail required, we use a consistent methodology to add the necessary data, ensuring that it constrains to published data at a higher level of geography or detail;
- on occasion, where ONS data is internally inconsistent we apply techniques to remove these inconsistencies.

The most timely and reliable data at the regional level is the workforce jobs series, published on a quarterly frequency by the ONS. There have been revisions to estimates of Workforce Jobs going back several years caused by benchmarking to the latest estimates from the annual Business Register and Employment Survey (BRES), updating seasonal factors and taking on board late information.

Employee jobs, self-employed jobs and government trainees are published at the level of the SIC 2007 Section providing us with 22 sectors.¹ In order to disaggregate this Section-level data to 2-digit sectors from which we can construct the Experian 38 sectors we use official survey data:

- In the case of employee jobs, we use the Annual Business Inquiry (ABI) and Business Register & Employment Survey (BRES). These are annual surveys which are not updated after being published – further the methodology has changed over the lifetime of these surveys. We apply a principled set of rules to derive consistent employee job shares within the Sections from the surveys.
- The March 2019 RPS saw the inclusion of the 2017 BRES, which provides data up to 2017. Pre-2010 we have made a working-owners adjustment, based on an overlapping year published by NOMIS in February 2013, in line with their recommended techniques for dealing with discontinuities.
- In the case of self-employed jobs, we use data from the Labour Force Survey (LFS).

Workforce jobs is the sum of employee jobs, self-employed jobs, government trainees and Her Majesty's Forces (who are assigned at the sector level to Public Administration and Defence).

To estimate full-time equivalent employment (FTE), we use data on hours worked in each sector and region derived from the Annual Survey of Hours and Earnings (ASHE). ASHE is also used to derive wage data for each region and sector.² We also use, for this purpose, compensation of employee data from the regional accounts.

GVA measured on the income basis is published in the regional accounts at an annual frequency in current prices. Total GVA and GVA by industry lag the latest complete year by 12 months. With the

¹ The ONS has ceased publishing official 2-digit employee jobs data for the regions. The approach we have taken is consistent with the approach recommended by the ONS to derive 2-digit estimates.

² We do not routinely publish sector level wage forecasts; however, it is available on request.

exception of manufacturing, the industry detail is only at the section level. Beginning with the December 2013 Regional Accounts (which were first incorporated in the March 2014 RPS), manufacturing GVA is available at the sub-section level. To construct the Chain Volume Measure data we follow these steps:

- the data is disaggregated and made quarterly using workforce jobs data;
- the data is deflated at the industry level using the UK deflators for the industries;
- the data is aggregated to produce a regional total – this implicitly creates a regional deflator by taking into account the different weightings of industries within a region.

Income is published in the regional accounts on an annual basis with a full breakdown of income sources and deductions. Previously official sources included income from Non-Profit Institutions Serving Households (NPISH) in the household income data due to lack of credible information to split these. But more recently, the ONS has improved their data accuracy by providing income data that is 'households' only, which we have used, thereby excluding NPISH from our income estimates, in the March 2019 vintage.

Income sources are:

- compensation of employees: wages and salaries *plus* employers' social contributions
- self-employment income
- Net Property Income: made up of property income received *less* income paid
- transfers from the State (i.e. benefits and pensions)
- other Transfers

Income deductions are:

- taxes
- social contributions
- transfers to others

The sum of income sources *less* income deductions constitutes disposable income. To convert this annual data to quarterly jobs we use (depending on the component) employee jobs, self-employee jobs or the UK quarterly pattern. We constrain these quarterly series to the official UK published data. Real disposable income is obtained by deflating disposable income by the consumer price deflator.

Household spending is derived by sharing out UK nominal expenditure using regional shares of expenditure reported in the Living Costs and Food Survey by type of expenditure. Nominal regional spending is deflated by published UK deflators and then aggregated to produce a regional total. This again implicitly creates a regional cost of living measure which we also publish.

Sub-national population projections are obtained from the ONS, based on the 2016 sub-national projections for England and Scotland while Wales remains 2014-based. These are spliced onto the 2016 mid-year estimates and constrained to the latest national 2016-based projections.

Our working-age definition incorporates all announced future changes in the state pension age:

- The state pension age for women is rising from 60 to 65, equal with males. Both will then rise, in step, to 67 in our current forecast period.
- Female state retirement age began to increase from 60 in April 2012, reaching 65 by 2018q4.
- From April 2019, both men and women will see their state retirement age rise from 65 to 66, with men reaching 66 by April 2020, and women a few months later in October 2020.
- The move from 66 to 67 is scheduled from April 2026 until April 2028 for both men and women.

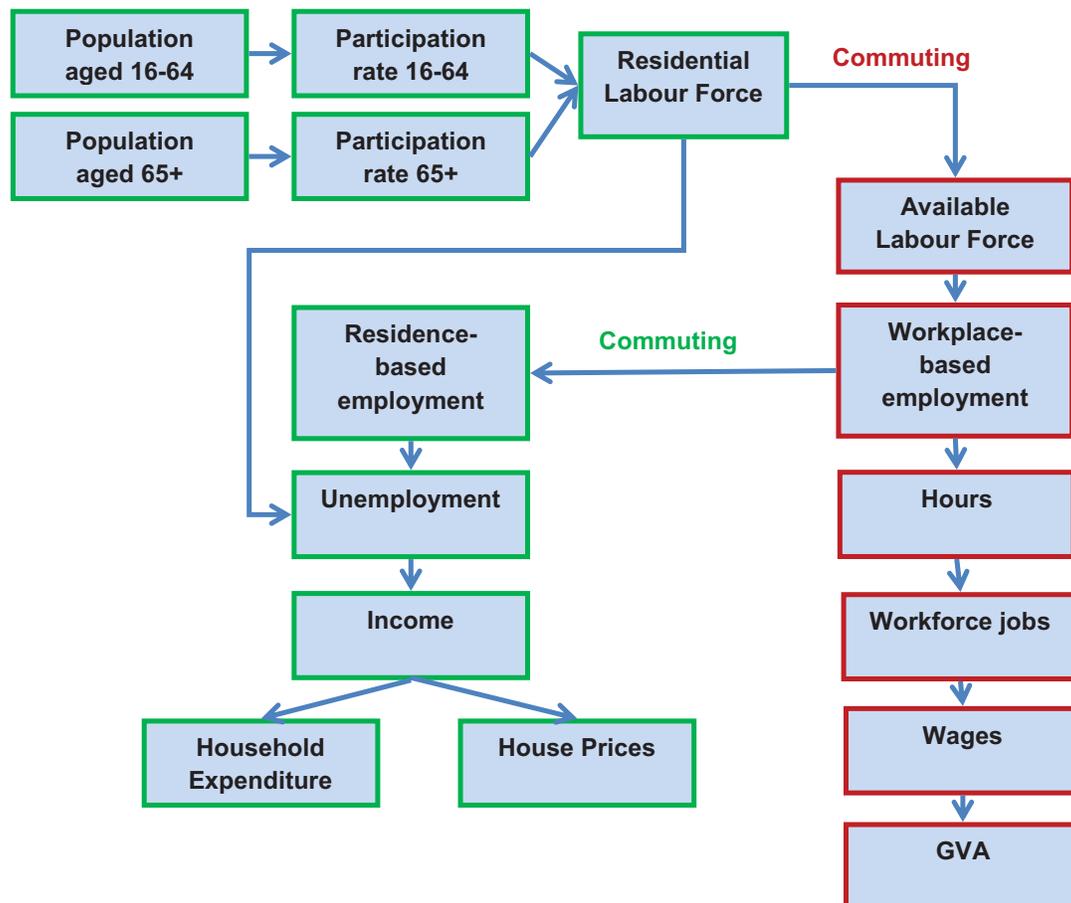
The 2013 Autumn Statement stated that the rise in state pension age to 68 would be moved forward from 2046 to the mid-2030's. However, with no firm date, we have not yet incorporated this into our working age and state retirement age definitions.

Under the current law, the State Pension age is due to increase to 68 between 2044 and 2046. Following a recent review, however, the government announced plans to bring this timetable forward. The State Pension age is now set to increase to 68 between 2037 and 2039. The policy change was announced as of July 2017

We publish the following breakdown of population: school age (ages 0-15), state working age, state retirement age, adult population (16 and over) and total. Beginning in the March 2015 RPS, we also publish both the population aged 16-64 and 65 and over. Although their respective participation rates are not published, they can be derived. Our overall participation rate is based on a ratio of the total labour force to the entire adult population (not only the working age population).

3.2.2 Forecast

The regional model is sequential. Each variable is dependent only on variables earlier in the sequence and not variables later in the sequence. Variables are either workplace-based (red outlined boxes) or residence-based (green-outlined boxes.) Workplace-based and residence-based variables are linked by commuting relationships derived from the 2011 Census.



The population – split into two age ranges – is taken from the National and Sub-National Population Projections. We forecast participation rates for these age bands separately as they are subject to different trends. The total residential labour force is the sum of the labour force aged 16-64 and 65-plus. The aggregate participation rate is determined by two factors:

- The participation rate of the two age bands; and
- The share of each of the two age bands in the adult population.

The participation rate for those aged 16-64 is expected to remain relatively stable throughout the forecasting period. However, the rate for those aged 65 and over will grow strongly due to factors such as increasing life expectancy and rising state pension ages.

At the UK level, the share of the adult population aged 65 and over is projected to rise sharply over the next twenty years. There is, however, considerable variation at the regional level. Greater London – the youngest region in the UK – is projected to have a stable share.

These factors combine to produce substantial variation in the labour force forecasts for different regions.

Commuting flows are used to derive the available labour force for a region. This is:

Workers Resident in the Region – Workers Commuting Out + Workers Commuting In

In the case of Greater London, the South East and the East of England, these flows lead to a substantial difference between the residential labour force and the available labour force. The effect is still present but less pronounced in other regions.

The available labour force is one of the drivers in forecasting workplace-based employment. The other drivers include the industry mix and the performance of industries at the UK level. If industries with a high share in the region are performing well at the UK level, this will benefit the region.

The workplace-based employment is converted back into residence-based employment. This is:

Workplace-based Employment – Workers Living Elsewhere + Residents Working Elsewhere

From this point, residence and workplace-based variables are solved in parallel with residence-based variables dependent on residence-based employment and workplace-based variables dependent on workplace-based employment.

The residential labour force and residence-based employment are used to calculate unemployment. Residential income is driven by employment; and itself drives house price and household expenditure forecasts.

Workplace-based employment drives aggregate hours worked, wages and GVA. These aggregate variables feed into the detailed part of the model, which produces forecasts for each industry:



In each case, we forecast shares of the region within the UK industry. We then share out the UK industry data subject to the constraint of the total that has already been determined and the UK total.

3.3 Local methodology

3.3.1 History

As at the regional level, all local economic history used in the RPS is derived from official statistics published by the ONS. Our approach to using this data is identical to that given above at 3.2.1. However, data at the local level is more likely to be incomplete¹ or inconsistent² than is the case at the regional level. For this reason, there is greater call for the application of techniques to construct missing data and to remove inconsistencies than is the case at the regional level.

In all cases, local area data in a particular region is constrained to match the regional total for the same variable. This has two particular advantages:

- Local data is made consistent with regional data of the same vintage.
- Where local data has been estimated or constructed, the regional data ensure that the estimates together are consistent with more reliable data.

The ONS do not publish a workforce jobs series at the local level. Accordingly, we construct workforce jobs series for each local area using BRES/ABI in the same way that BRES is used at the regional level to disaggregate section estimates. The BRES share for a particular industry of a local area in its parent region is used to disaggregate the regional workforce jobs series for that industry. As BRES is a survey, the figures over time for a particular local area industry combination can be volatile³. Further, certain years' results may be withheld to prevent disclosure of confidential data. Accordingly, to obtain sensible data it is necessary for us to smooth out this volatility and to interpolate over the gaps.

At the local level, the most timely and comprehensive data are Annual Population Survey (APS) for residence and workplace-based employment and unemployment data⁴. These data are obtained directly from NOMIS and then constrained to the national numbers.

In September 2015, we re-visited the relationship between local workforce jobs and workplace-based employment. The local workforce jobs (which make use of BRES shares) was benchmarked to the ILO

¹ For some local areas, publication of certain data by the ONS is restricted because to do so would effectively disclose individual responses to ONS data-collection surveys (e.g. if there are only one or two firms in a certain industry in a particular locality.)

² In some cases, sample sizes in ONS data-collection surveys at the local level are very small. This leads to data of comparatively poor quality and relatively high volatility.

³ The volatility represents sampling variability rather than actual volatility in the population data.

⁴ In line with ONS guidelines, we use the official model-based estimates of local unemployment that are more accurate than survey data which suffers from volatility.

workplace-based employment which itself has first been benchmarked to the Census 2011 point with the pattern in years either side preserved.

Regional accounts data is provided at sub-regional level for both GVA and income as it is at the regional level. The same methods are used at the local level as at the regional level to process these data. However, sub-regional data is only published for NUTS2 and NUTS3. Since not all local authorities constitute a NUTS3, it is necessary to disaggregate these data to local level. Further, the data provided at NUTS3 are less comprehensive than those provided at NUTS2¹. We make use of this NUTS2 data by constraining our disaggregated NUTS3 estimates to their parent NUTS2. We then disaggregate these constrained NUTS3 data to local data³.

In the case of GVA, the data provided at NUTS2 is at the section level with sub-sectional data for manufacturing. For NUTS3, several sections are aggregated. In particular, there is less detail in the service sectors. Disaggregation (of industrial data and from NUTS3 to local data) takes place using workforce jobs data at the industry level. Please note that in the latest December 2018 release of regional accounts, the boundary definitions were revised for Scotland, at NUTS2 level for GVA, which also led to changes in the NUTS3 groupings that add to NUTS2. This re-grouping in the official statistics led to revisions in the GVA estimates for the local authorities in Scotland in the March 2019 vintage.

In the case of Income (which is now households only²), the data provided at NUTS2 has the same level of detail as at the regional level. For NUTS3, the ONS has previously only released data at the primary and secondary level. They have now produced the full breakdown of income, which we have included since our September 2015 RPS. Disaggregation from NUTS3 to local level takes place using employee jobs, self-employed jobs, unemployment or population.

No estimates of household spending are provided at the local level. Household spending is, therefore, derived by using the share of local disposable income in regional disposable income.

Since June 2016, we have applied a moving average procedure to smooth the Annual Population Survey data which has resulted in revisions to our historical data.

We have not used any local data published after June 2019 in producing this update of the RPS. It is possible that between this date and the release of the RPS some new history may have been released and/or revised.

3.3.2 Forecast

The local authority model is run separately for the local authorities in each region and takes the regional forecast as given. Accordingly, as with local history, local forecasts are constrained to the regional forecasts of the parent region.

Our local model is based on the resolution of demand and supply for labour and it takes into account commuting between local areas within a region and across the regional boundary. The properties of the model are these:

- When unemployment is low, labour supply growth is the key determinant of growth.
- When unemployment is high, growth in demand for labour is the key determinant of growth.
- As unemployment decreases,

¹ NUTS2 is provided at the same level of detail as NUTS1 (i.e. regional) level.

² i.e. excludes NPISH in the March 2019 vintage as ONS now provides more accurate income data by 'households only at regional and local level

- Labour supply growth becomes relatively more important
- Growth in demand for labour becomes relatively less important
- An area's workplace employment growth depends on labour supply not only in the area but also
 - Labour supply growth in other local areas in the region from which it has historically drawn inward commuters.
 - Its historic share of incoming workers across the regional boundary.
- An area's residence based employment growth depends on demand for labour not only in the area but also
 - Growth in demand for labour in other local areas in the region to which it has historically supplied commuters.
 - Its historic share of outgoing workers commuting across the regional boundary.
- Workplace based employment drives GVA growth.
- Residence based employment drives Income and, accordingly, spending growth.

The starting point is an estimate of the growth in the participation rate of those aged 16-64 and 65-plus in a local area. These are used to derive labour force growth.

In parallel, demand for labour is estimated. This is done at the industry level by linking job growth¹ in a local area to growth in the same industry at the regional level and then constraining demand for jobs by industry to demand for jobs for the same industry at the regional level. The effect of this is:

- Demand for jobs at the local level is fastest in those industries which are performing best at the regional level.
- Total demand for jobs at the local level depends on its industrial structure. Those local areas which have a more than proportionate share of the best performing industries will perform best overall.

The supply and demand for labour is then resolved in the following way:

- Total demand² for jobs for each local area is converted into demand for workers according to the historic ratio between jobs and workers into that local area.
- The inflow and outflow of workers across the regional boundary is shared out between local areas according to their historic commuting patterns leading to an adjustment in
 - The remaining demand for labour for a local area (*inflow*)
 - The remaining available labour for a local area (*outflow*)
- Workplace demands for workers are converted into residence-based demands according to historic commuting patterns.
 - If unemployment is sufficiently high, these demands are satisfied out of the growth in the labour supply and the pool of available (unemployed) workers.
 - If unemployment is sufficiently low, these demands can only be satisfied out of the growth in the labour supply.
 - If unemployment is above its lower bound but not too high, a proportion of demands are satisfied out of the pool of available workers and the rest are satisfied out of the growth in the labour supply.
 - The model makes short-term adjustments in the labour supply in response to demand conditions to reflect the economic reality that
 - When demand is high, the participation rate rises as potential workers are drawn into the labour force by the relatively buoyant conditions;
 - When demand is low, the participation rate declines as disillusioned workers leave the labour force because of the poor job market conditions;

¹ Separately for employee jobs, self-employee jobs, government trainee jobs and Her Majesty's Forces.

² i.e. all industries and job types aggregated.

- The unemployment rate, accordingly, behaves as expected.
- The satisfied residence supply for labour is converted back into workplace demands and workplace-based employment is calculated for each local area. This is then converted back into jobs and used to produce final workforce jobs estimates for each local area.

The consequence of this is that:

- Local areas with high demand may not see all of that demand satisfied if there is insufficient available labour supply to meet those needs. Jobs growth will, accordingly, be slower.
- Local areas with high labour supply may not see higher growth in residence employment if there is insufficient demand for labour to use it up.

GVA growth is then forecast based on growth in workplace-based employment according to equations, which link GVA growth to workplace-based employment. Income is forecast by component based on residence-based employment (in the case of compensation for employees or self-employment), unemployment (in the case of benefits) and population in any other case. Spending depends on income by component.

4 Key changes since June 2019 RPS

4.1 UK forecast

The September RPS forecast is consistent with the August 2019 UK macro forecast.

The initial Brexit departure date of March 29 came and went, and the UK remains in the EU. The EU has granted the UK an extension to the deadline, out to October 31. The prevailing balance of sentiment in Parliament had diminished the chances of a no-deal Brexit, but no-deal is now firmly back on the table. Prime minister Johnson has explicitly committed himself to a no-deal Brexit should a deal not be ready by Halloween. In the meantime, deteriorating business investment, and negative consumer confidence are stifling output growth.

Our central case sees GDP grow by 1.1% this year, a slight downgrade compared to the June RPS forecast. Economic activity slowed more than expected in the second quarter, declining by 0.2% (q-on-q). The biggest drag on overall growth came from declining output in the production sector, which fell by 1.4%. This was driven by a sharp contraction in manufacturing output, signalling continued volatility throughout the first half of this year. In contrast, private consumption and government consumption both continued to contribute positively to GDP growth, adding 0.3% and 0.1% respectively. Strengthening consumer spending coincides with a recovery in real incomes, though the outlook remains challenging. Inflation has dropped markedly over the past year, but rose slightly in July to 2.1%. Furthermore, consumer credit growth continues to slow and the scope to erode savings further is minimal.

Brexit related uncertainty is hurting the UK economy, with output growth anticipated to average 1.5% per year in the 2019-2022 period. Weaker growth is attributable both to a deterioration in business investment, and consumer confidence. If the UK crashes out of the EU with a no-deal, the slowdown is anticipated to be much more marked. A renewed depreciation in sterling, rising inflation and uptick in the unemployment rate would likely act as a substantial drag on output growth.

September 2019 RPS forecast. Previous forecast (May 2019 macro = June 2019 RPS) in brackets.

UK	2017	2018	2019	2020	2020-2026	2027-2038
GDP growth	1.8% (1.8%)	1.4% (1.4%)	1.1% (1.5%)	1.2% (1.4%)	1.8% (1.7%)	1.7% (1.7%)
Workforce growth	Jobs 1.0% (1%)	0.6% (0.6%)	1.3% (1%)	0.5% (0.6%)	0.6% (0.6%)	0.5% (0.5%)
Unemployment rate	4.4% (4.4%)	4.1% (4.1%)	3.9% (3.9%)	4.0% (4.1%)	3.8% (3.9%)	3.9% (4%)
Real Income growth	0.5% (0.5%)	2.2% (2.2%)	1.9% (1.6%)	0.6% (0.7%)	1.6% (1.6%)	1.9% (1.9%)
Spending Volumes growth	2.1% (2.1%)	1.7% (1.7%)	1.7% (1.6%)	1.4% (1.5%)	1.8% (1.8%)	1.8% (1.8%)
House price growth	4.6% (4.6%)	3.5% (3.5%)	2.2% (2.2%)	3.0% (3%)	3.8% (3.8%)	4.0% (4%)

UK Outlook

The following was the outlook in August, consistent with the regional forecast. Our UK macro view is updated monthly and can be found on our website:

<https://analyticsondemand.experian.co.uk/discover/economics/uk-economic-forecasts/>

The latest figures released by the Office for National Statistics (ONS) showed that UK GDP declined by an estimated 0.2% (q on q) in the second quarter of 2019, having grown by 0.5% in the first quarter of the year. When compared with the same quarter a year ago, UK GDP increased by 1.2% in Quarter 2 2019; down from 1.8% in 2019Q1.

The dominant services sector output provided the only positive contribution to GDP growth, albeit with expansion slowing to 0.1% in 2019Q2. This largely stemmed from information and communication activity (contributing 0.14%), with a marked slowdown in wholesale and retail trade (contributing 0.03%) compared with the previous quarter. Business investment component posted its first rise in four quarters, at a revised 0.4%.

Consumer spending growth accelerated to 0.3%, up from 0.7% in 2019q1, with retail sales volumes increasing by 0.5 %, underpinned by stronger than expected online sales.

Job creation in the UK picked up notably in the three months to June 2019. The employment rate was estimated at 76.1%, higher than a year earlier but fractionally down on the preceding quarter. The unemployment rate edged back up, following six consecutive periods of contraction. Although declining for a sixth consecutive period, job vacancies remain high compared to their historic average, at 820,000. Comparing April 2019 June 2019 with a year earlier, pay for employees in Great Britain increased by 3.7% including bonuses and 3.9% excluding bonuses.

The latest release for retail sales by the Office for National Statistics (ONS) showed that volumes for July increased by 0.2% month on month, following a 1% rise in June. Bolstered by favourable labour market conditions, consumer confidence continues to show some resilience in the face of mounting uncertainty, albeit at a notably slowing rate.

Key risks

EU and global trade expansion has faltered in recent months. If the outlook weakens the UK will be unable to capitalise fully on what remains an historically weak exchange rate. Renewed tensions in the trade war between China and the USA are particularly concerning. Chinese annual output growth eased to 6.2% in 2019Q2, the slowest pace since records began, in 1992, prompting fears of a global economic slowdown.

Real household incomes have recovered markedly over the past year. However, the favourable movements in inflation and pay growth have flattened out in recent months. If the most recent move downwards in income growth persists, consumer confidence and spending will suffer, renewing the strain on output gains in the consumer facing services industries.

A renewed depreciation of sterling, and an associated rise in import costs represents a key downside risk to real income growth, particularly given the impact of Brexit uncertainty on the exchange rate.

In the mid to long term, the UK's economic fortunes will largely be shaped by the final terms of the Brexit deal. The impact on external trade, foreign direct investment and migration flows are of particular importance as these influence the UK's long-term economic growth potential via labour supply and

productivity. There will be a trade-off between market access and control over EU migration, so there is a real risk that the UK will have to accept significantly less favourable terms of access, which could undermine prospects for trade and investment. No adjustments have been made to the underlying population projections in our base case, but downside risks clearly exist on this front from a potential slowdown in EU migration.

4.2 Regional Forecast

We have not used any regional data published after July 16th, 2019 in producing this update of the RPS. It is possible that between this date and the release of the RPS, some new history may have been released and/or revised. In addition to changes to the UK history to which our regional data is constrained, changes to the regional history can be traced back to the following new quarterly data (June 2019 RPS endpoint in brackets):

- Regional Workforce Jobs 2019q1 (previously 2018q3)
- ILO data for 2019q1 (previously 2018q3)

September 2019 RPS forecast. Previous forecast (June 2019 RPS) in brackets.

Regional forecast 2019-39 ave. growth	SW	SE	GL	ET	EM	WM	NW	NE	YH	SC	WA	NI
GVA growth	1.6% (1.6%)	1.9% (1.8%)	2.1% (2%)	1.8% (1.7%)	1.5% (1.5%)	1.4% (1.4%)	1.4% (1.4%)	1.2% (1.2%)	1.4% (1.4%)	1.3% (1.3%)	1.3% (1.3%)	1.2% (1.2%)
Workforce Jobs growth	0.6% (0.6%)	0.7% (0.7%)	0.8% (0.8%)	0.6% (0.6%)	0.5% (0.4%)	0.4% (0.4%)	0.5% (0.4%)	0.1% (0.2%)	0.4% (0.4%)	0.2% (0.2%)	0.3% (0.3%)	0.3% (0.2%)
Unemployment rate	3.2% (3.3%)	2.8% (2.9%)	5.0% (5.1%)	3.4% (3.5%)	3.9% (4%)	4.7% (5.1%)	4.1% (3.7%)	4.9% (5%)	4.2% (4.2%)	3.6% (3.7%)	3.8% (4%)	3.6% (3.6%)
Real income growth	1.7% (1.8%)	2.0% (2%)	1.9% (1.9%)	1.9% (1.9%)	1.7% (1.7%)	1.5% (1.5%)	1.6% (1.6%)	1.4% (1.4%)	1.6% (1.6%)	1.4% (1.4%)	1.4% (1.4%)	1.5% (1.6%)
Spending volumes growth	1.7% (1.7%)	2.0% (2%)	2.3% (2.3%)	1.8% (1.8%)	1.6% (1.6%)	1.6% (1.6%)	1.6% (1.6%)	1.4% (1.4%)	1.6% (1.6%)	1.4% (1.4%)	1.4% (1.3%)	1.6% (1.6%)
House price growth	3.7% (3.7%)	4.1% (4.1%)	4.0% (4%)	3.8% (3.8%)	3.6% (3.6%)	3.7% (3.7%)	3.8% (3.8%)	3.3% (3.3%)	3.0% (3%)	3.6% (3.6%)	3.4% (3.4%)	3.4% (3.4%)

4.3 Local Forecast

Changes to the local history are due to revisions at the regional level to which our local data is ultimately constrained.

For more information about how the history is constructed refer to [section 3.2.1](#) for regions and [section 3.3.1](#) for local authorities.

4.4 Population

There have been historical revisions for areas within England and Wales for mid-2012 to mid-2016 due to “improved methods for international emigration at the local authority, previously unavailable data for

international immigration at the local authority level and improvements to accounting of the dependents of foreign armed forces personnel”.

We also include the 2016-based sub-national population projections for England and Scotland and as of the March 2019 RPS, we have accounted for revisions to the population projections. The key points highlighted in the release are:

- The populations of all regions in England are projected to grow by mid-2026; regions in the north of England are projected to grow at a slower rate than those in the south.
- London is projected to be the fastest growing region; the North East is projected to have the slowest rate of growth.
- Nearly all local authorities are projected to grow by mid-2026; the populations of just 15 local authorities are projected to fall.
- Tower Hamlets is projected to be the fastest growing local authority in England; its population is projected to grow by 17.8% between mid-2016 and mid-2026.
- The number of people in older age groups is projected to grow faster than those in younger age groups in all but five local authorities; by mid-2026, a total of 97 local authorities are projected to have a population where at least one-quarter of the population is aged 65 and over.
- Over the 10 years to mid-2026, London is the region with the fastest increase in population of those aged 65 and over; however, it remains the region with the lowest old age dependency ratio.

5 A note from the ONS on volatility

A change in methodology behind Office for National Statistics (ONS) employment surveys has produced widespread volatility in the historical data, particularly from 2010.

The following is an explanation directly from the ONS, please see [section 3](#) for more information on how we deal with volatility in the official data:

“A fundamental redevelopment of Workforce Jobs sources, classifications, methods and systems was recently undertaken and is explained clearly in the article ‘Revisions to Workforce Jobs’ (Barford 2010). One of the key changes highlighted in this article was the replacement of a matched-pairs estimator with a point-in-time ratio estimator, ONS’s standard method. This change was aimed at removing the bias caused by the matched-pairs method. A matched-pairs method tends to underestimate change over time, as it excludes the births and deaths of businesses in the sample. In essence, only those businesses sampled in two consecutive periods are used to produce estimates of change. This bias used to cause large revisions when the short-term employment surveys series were benchmarked retrospectively to Business Register Employment Survey (BRES) estimates. BRES is an annual survey which selects a larger sample and also uses a point-in-time ratio estimator. The point-in-time estimator includes all sampled businesses in each and every period, which reduces the bias over-time. The trade-off is an increase in volatility caused by the inclusion of the rotated part of the sample for small and medium sized businesses. Sample rotation spreads the administrative burden; ensuring businesses are selected for a limited number of periods.

Unfortunately, the volatility of regional estimates at an industry level has been far greater than anyone anticipated and in general has been met unfavourably by users, particularly those that are interested in regional data. There are a number of instances, for example,

whereby businesses have been 'rotated in' to a particular region and served to distort the level of jobs for a particular industry, usually for a period of 5 quarters, which is the time a rotated business remains in the sample of the STES."

Regional employment is the most timely and only source of quarterly data at this level of geography and is used to derive the quarterly profile of other variables in our regional models. Therefore this volatility is reflected in output as well as employment. Please see [section 3](#) for more information on how we deal with volatility in the official data.

Appendix A....Glossary of terms

Glossary of terms

Gross Domestic Product (GDP) Total work done in an economy in a period measured in one of three ways:

- Output Measure: Output of all goods and services less inputs
- Income Measure: Income earned by all parts of the economy
- Demand Measure: Demand for goods and services comprised of
 - Expenditure by Households, NPISH and Government
 - Investment (Gross Fixed Capital Formation) by business and Government
 - Changes in Inventories and Acquisitions less disposals of valuables
 - Exports less imports

GDP is measured in market prices: this means that the prices used to convert output of goods and services into money include taxes and subsidies by the government. Distributors' margins are credited to the industry producing the goods and services not to the distribution industry.

Gross Value Added (GVA) GVA is identical to GDP except that it is measured in basic prices. These prices do not include taxes and subsidies imposed by the government. Distributors' margins are credited to the distribution industry. GVA for an industry is described by either of the following identities:

- GVA is identical to output of the industry less inputs of the industry
- GVA is identical to the sum of
 - Compensation of Employees in the industry
 - Gross Operating Surplus (i.e. profit) earned by capital in the industry

When looking at GVA for an industry, it is important to realise that it only includes the output of that industry (i.e. the value added by that industry.) For example retailing GVA only includes the value added by retailers (e.g. customer service etc).

GVA in the RPS is measured by the place where the work is done (workplace based) and not where the worker resides.

Current Price / Chain Volume Measure (CVM) Data where the unit of measurement is money are available either in Current Price (or Nominal) terms or CVM (or Real) terms. The distinction is important because the buying power of money changes over time. For current price data, no adjustment is made for this fact. CVM data adjusts all figures in a time series to be consistent with the buying power of money in a given year (the reference year). Current Price data, thus, measures values while CVM data measures volumes. For example, Current Price GDP is the money value of production in a given period while CVM GDP is the amount of production. For years before the reference year, CVM data is not additive (thus the sum of GVA for all sectors will not equal total GVA.) In all other years, CVM data is additive.

Productivity A measure of efficiency calculated by estimating output per unit of input

Workforce Jobs A count of the total number of jobs in the UK, a region or industry. It is comprised of

- Employee Jobs: The number of jobs where the occupant is an employee.
- Self-employee Jobs: The number of jobs where the occupant is self-employed
- Government-Sponsored Trainees: The number of jobs where the occupant is on a government training scheme.
- Her Majesty's Forces: The number of jobs in the armed forces (part of Public Administration & Defence).

Workforce jobs and all its components count jobs and not people. This means that where a person has two or more jobs they are counted once for each job that they have. This can be contrasted with the ILO employment measures. Another consequence of counting jobs is that Workforce Jobs is based on the place of work not the residence of the worker

Full Time Equivalent Employment: Our definition is based on total hours worked and is as follows:

FTE = (HOURS) divided by (37.8*13)

Here a constant yard-stick of full-time employment for all industries, regions and industry-region based on thirteen working weeks in a quarter at 37.8 hours a week. 37.8 hours is the average hours worked by a full-time worker in the UK between 1990 and 2009.

ILO Employment The International Labour Organisation (ILO) provides an international standard method of measuring employment. In the UK this is implemented by means of a survey known as the Labour Force Survey (LFS) or Annual Population Survey (APS). It is a people count based on the main job that a person has. Employment comprises:

- Employees: People whose main job is as an employee.
- Self-employed: People whose main job is as a self-employed person.
- Government-Sponsored Trainees: People whose main job is on a government training scheme.
- Unpaid Family Workers: People whose main job is as an unpaid worker in a business owned by their own family.

There are two measures:

- Residence based, which depends on the place of residence of the worker (irrespective of where they work.)
- Workplace based, which depends on the place of work of the worker (irrespective of where they reside.)

The ILO Employment reported is based on the entire population in work ages 16+.

ILO Unemployment The International Labour Organisation (ILO) definition of unemployment covers people who are: out of work, want a job, have actively sought work in the previous four weeks and are available to start work within the next fortnight; or out of work and have accepted a job that they are waiting to start in the next fortnight.

ILO unemployment is only available on a place of residence basis and is based on the entire unemployed population ages 16+.

Labour Force / Economically Active The sum of ILO Unemployment and ILO Employment. That is all people who are in work or who are looking for a work. A person who is in the labour force is said to be Economically Active.

The Labour Force includes the entire Economically Active population ages 16+.

Economically Inactive A person who is not economically active. The principle categories are retirees, students, children, long-term sick or disabled, homemakers and carers. This does not include school-aged people.

Claimant Count Unemployment Measures the number of people who are claiming Jobseekers' Allowance (JSA). This is always less than ILO Unemployment because not everyone who is ILO unemployed is eligible to claim JSA and not all who are eligible claim. Particular important cases are:

- People whose partners work more than 16 hours a week – they cannot claim JSA but may be ILO unemployed.
- People who are past state retirement age – they cannot claim JSA but may be ILO unemployed.

Extra Regio In addition to the 9 English regions and the nations of Scotland, Wales and Northern Ireland, the UK's economic boundary includes the continental shelf and UK government operations abroad (i.e. embassies and HMF abroad). The ONS does not assign income or GVA attributable to these sources to any region or nation. Therefore, the sum of regional Income or GVA does not equal the UK. This also impacts on two industries Extraction & Mining and Public Administration & Defence.

School Age Population Population aged 0-15.

Working Age Population Population above the age of 15 but below the current state retirement age for their gender.

Retirement Age Population The population above state retirement age. The precise retirement date depends on date of birth and, for those born before 6th November 1953, on gender. At present, there is a phased equalisation in progress. After 6th November 2018, both men and women will retire at 65. This will rise to 66 between 6th March 2019 and 6th September 2020 and 67 between 6th April 2026 and 6th March 2027. Our forecasts take account of these changes to retirement legislation.

Adult (16+) Population Number of all people aged 16 and above.

Household Consumer Spending The accounts relate to consumption expenditure by UK resident households, either in the UK or the rest of the world. Spending by non-residents in the UK is excluded from the total

Household consumption includes goods and services received by households as income in kind, in lieu of cash, imputed rent for the provision of owner-occupied housing services and consumption of own production

For national accounting purposes, households are individuals or groups of people sharing living accommodation

Household Disposable Income Household disposable income is the total payment to households (from wages, interest, property income and dividends) less taxes, social security, council payments and interest

Cost of living index Regional consumer spending deflator. Gives an indication of how the value of consumer spending has grown in comparison to the volume.

NUTS (Nomenclature des Unités Territoriales Statistiques – Nomenclature of Territorial Units for Statistics) A European Union standard for classifying the subdivisions of member states. In the case of the UK, the English regions and the three nations are classified as NUTS1. The next level – NUTS2 – typically consists of aggregations of local authorities in the same region. The level below that, NUTS3 consists either of single local authorities or a small aggregation of local authorities in the same NUTS2. In Scotland, some local authorities are divided between NUTS3. NUTS4 and NUTS5 also exist but are not used in the RPS.

Appendix B...Sector definitions

Sector definitions

Experian 38-sector	SIC-2007 division	Falls within Experian 12-sector
Agriculture, Forestry & Fishing	01 Crop and animal production, hunting and related service activities	Agriculture, Forestry & Fishing
	02 Forestry and logging	
	03 Fishing and aquaculture	
Extraction & Mining	06 Extraction of crude petroleum and natural gas	Extraction & Mining
	05 Mining of coal and lignite	
	07 Mining of metal ores	
	08 Other mining and quarrying	
	09 Mining support service activities	
Food, Drink & Tobacco	10 Manufacture of food products	Manufacturing
	11 Manufacture of beverages	
	12 Manufacture of tobacco products	
Textiles & Clothing	13 Manufacture of textiles	
	14 Manufacture of wearing apparel	
	15 Manufacture of leather and related products	
Wood & Paper	16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials	
	17 Manufacture of paper and paper products	
Printing and Reproduction of Recorded Media	18 Printing and reproduction of recorded media	
Fuel Refining	19 Manufacture of coke and refined petroleum products	
Chemicals	20 Manufacture of chemicals and chemical products	
Pharmaceuticals	21 Manufacture of basic pharmaceutical products and pharmaceutical preparations	
Rubber, Plastic and Other Non-Metallic Mineral Products	22 Manufacture of rubber and plastic products	
	23 Manufacture of other non-metallic mineral products	
Metal Products	24 Manufacture of basic metals	
	25 Manufacture of fabricated metal products, except machinery and equipment	
Computer & Electronic Products	26 Manufacture of computer, electronic and optical products	

	27 Manufacture of electrical equipment	
Machinery & Equipment	28 Manufacture of machinery and equipment n.e.c.	
Machinery & Equipment	29 Manufacture of motor vehicles, trailers and semi-trailers	
	30 Manufacture of other transport equipment	
Other Manufacturing	31 Manufacture of furniture	
	32 Other manufacturing	
	33 Repair and installation of machinery and equipment	
Utilities	35 Electricity, gas, steam and air conditioning supply	Utilities
	36 Water collection, treatment and supply	
	37 Sewerage	
	38 Waste collection, treatment and disposal activities; materials recovery	
	39 Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the cleanup of contaminated buildings and sites, soil, surface or ground water.	
Construction of Buildings	41 Construction of buildings	Construction
Civil Engineering	42 Civil engineering	
Specialised Construction Activities	43 Specialised construction activities	
Wholesale	45 Wholesale and retail trade and repair of motor vehicles and motorcycles	Wholesale & Retail
	46 Wholesale trade, except of motor vehicles and motorcycles	
Retail	47 Retail trade, except of motor vehicles and motorcycles	
Land Transport, Storage & Post	49 Land transport and transport via pipelines	Transport & Storage
	52 Warehousing and support activities for transportation	
	53 Postal and courier activities	
Air & Water Transport	50 Water transport	
	51 Air transport	
Accommodation & Food Services	55 Accommodation	Accommodation, Food Services & Recreation
	56 Food and beverage service activities	
Recreation	90 Creative, arts and entertainment activities	
	91 Libraries, archives, museums and other cultural activities	
	92 Gambling and betting activities	
	93 Sports activities and amusement and	

	recreation activities	
Media Activities	58 Publishing activities	Information & communication
	59 Motion picture, video and television programme production, sound recording and music publishing activities	
	60 Programming and broadcasting activities	
Telecoms	61 Telecommunications	
Computing & Information Services	62 Computer programming, consultancy and related activities	
	63 Information service activities	
Finance	64 Financial service activities, except insurance and pension funding	Finance & Insurance
	66 Activities auxiliary to financial services and insurance activities	
Insurance & Pensions	65 Insurance, reinsurance and pension funding, except compulsory social security	
Real Estate	68 Real estate activities	Professional & Other Private Services
Professional Services	69 Legal and accounting activities	
	70 Activities of head offices; management consultancy activities	
	71 Architectural and engineering activities; technical testing and analysis	
	72 Scientific research and development	
	73 Advertising and market research	
	74 Other professional, scientific and technical activities	
	75 Veterinary activities	
Administrative & Supportive Activities	77 Rental and leasing activities	
	78 Employment activities	
	79 Travel agency, tour operator and other reservation service and related activities	
	80 Security and investigation activities	
	81 Services to buildings and landscape activities	
	82 Office administrative, office support and other business support activities	
Other Private Services	94 Activities of membership organisations	
	95 Repair of computers and personal and household goods	
	96 Other personal service activities	
	97 Activities of households as employers of domestic personnel	
	98 Undifferentiated goods- and services-producing activities of private households for	

own use	
Public Administration & Defence	84 Public administration and defence; Public Services compulsory social security
	99 Activities of extraterritorial organisations and bodies
Education	85 Education
Health	86 Human health activities
Residential Care & Social Work	87 Residential care activities
	88 Social work activities without accommodation

Appendix C...Geography definitions

We forecast at the following geographic breakdowns:

- UK
- Regions (12)
- Counties (64)
- Local authorities...post-2009 boundaries (347+33 London boroughs)

A full lookup in excel form can be found [here](#)

Appendix D...FAQ's

- Why does Experian's history for variable x differ from another source / raw survey data?
 - There are several possible reasons.
 - The first is a vintage mismatch. The ONS frequently revises its economic data in order to take account of new information or improved methodology. The date at which Experian has taken data for the current RPS is given in the body of this guide. Another source may have used earlier or later data.
 - The second relates to data processing. As explained in the body of this guide, it is sometimes necessary at the regional level and (particularly) at the local level to process or construct data. Our approach to doing this is explained in the body of this guide. We apply consistent methodologies to process the data. Other sources may carry this out in different ways. When compared against the raw source, our data may differ because, for example:
 - It has been constrained to other sources.
 - It has been converted into CVM data or quarterly data.
 - It has been made consistent with other data or a later vintage of data.
 - The third relates to raw survey data. Raw survey data is often volatile and does not take into account information outside the survey. Official statistics and our data are constructed from the raw survey data to take into account volatility, sampling issues and all available data sources.
- Why does Experian's job history differ from the *ABI* or *BRES*?
 - The *ABI/BRES* are surveys taken from a particular year; they are not updated.
 - *ABI/BRES* is a source for ONS' workforce jobs but it is not the only source.
 - *BRES* does not include government supported trainees, HM forces jobs and every self-employed small business. As a result, *BRES*'s employment numbers (mainly consisting of total employees and working owners e.g sole traders) would be lower than the ONS's workforce jobs.
 - Experian's workforce job history is designed to be consistent with the latest available ONS workforce jobs estimates, which includes a broad range of jobs (i.e. employee jobs, self-employment jobs, government supported trainees and HM forces).
 - Raw survey is often incomplete and suffers from sampling variability, which does not represent true volatility in the underlying population data. This must be removed to ensure high quality data.
- How often are data updated?
 - We always use the latest available data at the cut-off date for history.
 - New GVA data is available from the ONS
 - At the UK Level, three times a quarter.
 - At the Regional and Local level, annually (normally in December.)
 - New Expenditure data is available from the ONS at the UK level twice a quarter.
 - New LFS Employment data is available from the ONS once a quarter.
 - New Workforce Jobs data is available from the ONS once a quarter.
 - New *BRES* is published once a year (normally in December.)
 - New Income data is available from the ONS
 - At the UK level, once a quarter.
 - At the Regional and Local level, once a year (normally in April.)
 - Population projections are published once every two years.
 - New mid-year population estimates are published annually.
 - New LCFS is published annually.
- How do revisions to historical data affect your history and forecasts?
 - As explained above, we always take into account the latest historical data.
 - The monthly UK macro forecast is updated after each ONS revision of GDP for a quarter.
 - The RPS is based on a particular UK macro forecast and includes the latest available regional and local data.

- Forecasts are updated to be consistent with the latest historical data. While this will typically only affect the short-to-medium term, there are times when the long-run is necessarily affected. This will usually be when there has been a substantial revision to history.
- How are past growth trends captured in the forecasts?
 - All our models are econometric models.
 - An econometric model is a model estimated on historical data.
 - The coefficients (i.e. interactions) in the model embed historical relationships between variables and historical growth rates in a variable.
 - Where we believe that the forecast relationships may differ from history, we make appropriate adjustments to the forecast. This may be the case, for example, where an area has been substantially redeveloped in recent years.
- How are industry/regional/local developments and policies reflected in forecasts?
 - If past developments and policies are reflected in model inputs (for example population) or in history then they will be automatically captured by the model.
 - Our forecasts are policy-neutral in the sense that in our baseline assumes that sufficient projects, infrastructure, jobs etc. will be provided in order to meet the needs of the population in the long term. Thus although the project may not be explicitly included, an assumption that a project of its nature may have been included in the baseline.
 - It is important to realise that many developments or policies may not be sufficiently large enough to affect growth rates or may be implicitly included in the forecast from a higher level of aggregation.
 - We are able to make appropriate adjustments to the forecast to take into account certain large projects.
 - At the industry level we can take into account announced developments in that industry which are large enough to affect the growth in the industry at the national, regional or local level (as the case may be).
 - At the regional and local, we taken into account announced developments or policies which are large enough to affect growth at the regional or local level. The local model, in particular, has the facility to take into account the impact of additional population or jobs in a particular area.
 - The final forecast will show the net effect of the adjustment, after the effects of population constraints, job cannibalisation, commuting patterns etc.
- How does population relate to the employment forecasts?
 - This is discussed in detail in the methodology section above for the regions and the locals.
 - It is important to remember that employment is forecast on both a residence and workplace basis.
 - Residence based employment depends on local population (labour supply) growth but also on demand for work throughout the region and across the regional boundary.
 - Workplace based employment depends on labour supply throughout the region and across the regional boundary.
- What is working age?
 - The definition of working age used based on the state pension age.
 - As the state pension age for men and women changes in line with announced policy, the working age population will change to take this into account.
 - The key changes to the state pension age that have been announced are:
 - A gradual equality in state pension age for men and women.
 - A gradual rise in state pension age for both men and women to 67 (and 68 after the forecast horizon.)
- What is the participation rate / economic activity rate?
 - The participation rate or economic activity rate is the proportion of the population who are either employed or seeking employment (i.e. unemployed.)
 - The participation rate used in our models is based on the entire adult population (16+). This differs from earlier versions of our models which used only the working age population.
 - The participation rate is an endogenous variable in all our models. It is not a fixed assumption.
- What assumptions have been made regarding commuting in the local model?
 - Commuting in the local model is based on estimates given by the ONS.

- These are based on the Census 2011.
- Commuting assumptions are fixed over the forecast.
- However, the outcome for commuting may differ from the assumption because (for example) there is insufficient demand or supply for labour to provide as many workers across a particular commuting relationship.
- How is Full-Time Equivalent employment derived?
 - This is based on the total hours worked (please see the glossary.)
 - The relationship between FTEs and hours is fixed by definition.
 - In different industries, the hours worked per job will differ.
 - Historical data for this is taken from ASHE (please see the body of the guide.)
 - The forecast takes into account changing trends in hours per job. This will necessarily alter the relationship between Full-Time Equivalent employment and jobs.
- How does the weighting of different factors change over the forecast period?
 - There is no fixed rule about the changes in this time.
 - The coefficients of the econometric equations are fixed over time
 - However, at the local level population growth becomes more important as unemployment decreases.

Appendix E...About us



Our economic forecasting expertise

Experian's team of 18 economists is a leading provider of global, national, regional and local economic forecasts and analysis to the commercial and public sectors. Our foresight helps organisations predict the future of their markets, identify new business opportunities, quantify risk and make informed decisions.

Experian's economics team is part of a 140-strong analytics division, which provides an understanding of consumers, markets and economies in the UK and around the world, past, present and future. As part of the Experian group, the analytics division has access to a wealth of research data and innovative software solutions. Its statisticians, econometricians, sociologists, geographers, market researchers and economists carry out extensive research into the underlying drivers of social, economic and market change.

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Experian

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Appendix 6 Business Survey Questions

Maidstone Borough Business Survey

1.

Maidstone Borough Council is working with planning and economics consultancy Lichfields to undertake a survey to explore future needs for business and employment-generating development in the Borough to help to plan for a good supply of land and premises for businesses.

As a local business, we would be interested to hear your views on the overall area, local infrastructure and existing commercial premises as well as how the choice of premises could be improved to better meet the needs of local businesses.

We would be grateful if you could take 10 minutes to complete this short survey to provide your feedback and views by 25th September 2019. If you have any queries about this survey or would like more information, please contact Helen Smith at Maidstone Borough Council on 01622 602065 or via HelenSmith@Maidstone.gov.uk.

Disclaimer: Nathaniel Lichfield & Partners Limited ('Lichfields') is registered with the Information Commissioners Office (registration number Z6193122). Your responses will be analysed by Lichfields on behalf of our client: Maidstone Borough Council. It is not envisaged that any personal data will be supplied by virtue of completion of the survey, but in the event that any personal data is supplied, it will be disregarded and deleted without undue delay. Responses to this consultation may be made publicly available.

Please fill in the following details about your company:

Company name	<input type="text"/>
Type of company	<input type="text"/>
Current location	<input type="text"/>
Postcode	<input type="text"/>
Approximate number of employees	<input type="text"/>
Length of time trading in the Borough of Maidstone	<input type="text"/>

1. What types of premises do you currently occupy? Please select all that apply:

- Office
- Factory/workshop
- Warehouse

- Shop unit
- Home office
- Other (please specify):

2. Is your premises/site?

- Freehold
- Leasehold
- Managed workspace
- Other (please specify):

3. Please indicate how important each of the following factors is for locating your business in this area:

	Very important	Quite important	Not important	n/a
Availability of skilled labour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordability of premises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Road accessibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public transport accessibility/links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proximity to customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proximity to supply chain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proximity to other businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accessibility to training providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify):

4. How satisfied are you with your current business premises?

- Very Satisfied
- Quite Satisfied
- Not Satisfied

Comments:

5. How well do your current premises meet the space needs of your business?

- Not enough space
- About right
- Room to grow

6. Have you previously experienced any difficulties in finding suitable business premises or sites to expand, upgrade or relocate to within the local area (i.e. within Maidstone Borough)?

- Yes
- No
- n/a

If yes, please explain:

7. Have you previously experienced any difficulties in finding suitable business premises or sites to downsize or consolidate within the local area (i.e. within Maidstone Borough)?

- Yes
- No
- n/a

If yes, please explain:

8. If you answered 'yes' to either Question 6 or Question 7, please explain whether there is anything that you think could be done to help businesses like yours to overcome these barriers in the future?

9. Do you expect to expand or relocate your premises in the next 5 years (if 'no' please go to Question 12)?

- Yes
- No
- Possibly

10. If yes or possibly, are you most likely to (please select one only)?

- Expand on existing site
- Relocate to another site in the same location/nearby
- Relocate to another site in Maidstone Borough
- Relocate outside of the Borough
- Other
- Don't know

Comments:

11. What would you be looking for from new premises? Please select all that apply:

- Larger
- Smaller
- Higher spec – more prestigious
- Lower spec – less prestigious
- More affordable
- Freehold ownership
- Better access to main routes (e.g. M20/A229)
- Access to superfast broadband
- Better mobile phone reliability
- Better access to public transport routes
- Other (please specify):

12. Are there any factors that could prevent your business from staying in the area, or make you consider relocating? Please explain:

13. Any other comments?

Appendix 7 Employment Site Plans

Key

- Maldstone Local Authority Boundary
- Employment Site

Current Local Plan Employment Site Allocations:

1. West of Barradale Farm, Maidstone Road, Headcorn
2. South of Chygate, Paterden Lane, Marden
3. Woodcut Farm, Ashford Road, Pillesden
4. Woodcut Farm, Ashford Road, Bearsted
5. Newham Park, Maidstone
6. Maidstone East and former Royal Mail Sorting Office
7. Former Syngenta Works, Hempstead Lane, Yalding
8. Paver Road, Milling and Batts, Wharf, Maidstone
9. Mill Road, Maidstone

Current Local Plan Economic Development Site Allocations:

10. Lordswood Industrial Estate, Walderslade
11. Aylesford Industrial Estate
12. Aylesford Industrial Estate
13. Parkwood Industrial Estate, Maidstone
14. Toyl Green Business Park/Burial Ground Lane
15. Station Road/Lodge Road/Honeycreek Industrial Park, Staplehurst
16. Paterden Lane, Marden
17. Leimbak Storage
18. Leimbak Storage
19. Marley Works, Lenham
20. Barradale Farm
21. Station Road, Harrietsham
22. Viewpoint, Bowles Park, Lenham
23. Viewpoint, Bowles Park, Lenham
24. Tenace Court/Rebeck Business Park, Harrietsham
25. Hart Street Commercial Centre, Maidstone
26. Hermitage Mills, Maidstone
27. Beasted Green Business Centre (The Old Forge)
28. Beasted Green Business Centre (The Old Forge)
29. Headcorn South, Headcorn
30. Woodfalls Industrial Estate, Luddingford
31. Wurmlike Industrial Estate
32. Bredhurst Business Park, Walderslade
33. Bredhurst Business Park, Walderslade
34. Breakley Wood, Speldhurst Road, Maidstone
35. South Park Business Village, Maidstone
36. Turkey Mill Court, Maidstone
37. Eclipse Park, Maidstone
38. County Gate, Maidstone
39. County Gate, Maidstone
40. 23/29 Alison Place, Maidstone
41. Victoria Court, Ashford Road, Maidstone
42. Gail House, Link House, Kestrel House and Chaucer House



LICHFIELDS

Project	Maidstone EDNS
Title	Employment Sites
Client	Maidstone Borough Council
Date	28.08.2019
Scale	1:70,000 @ A3
Drawn by	MAR
Dwg. No	GS/LA/60172/01-04

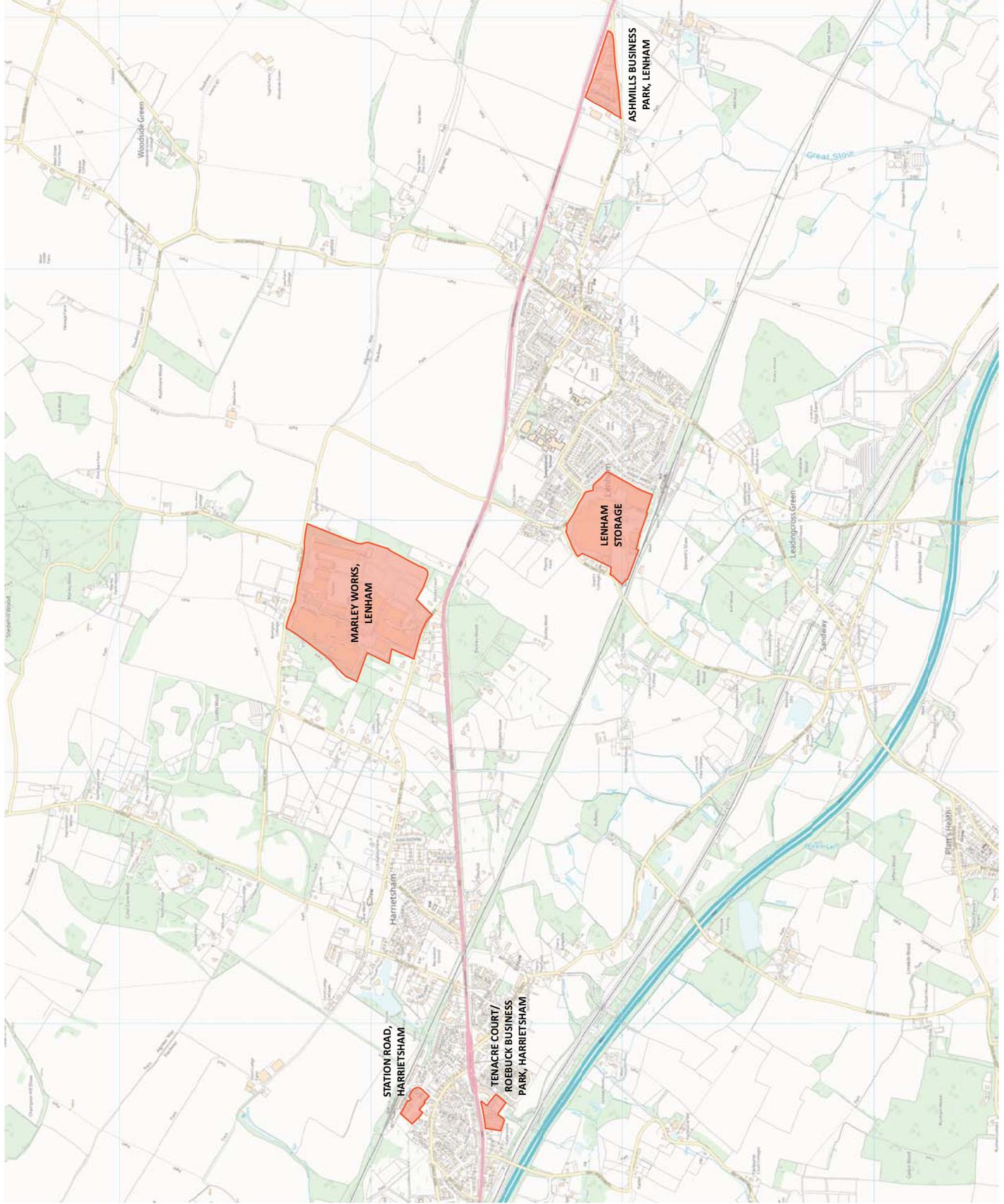
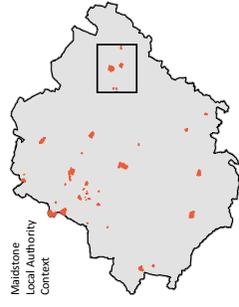
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Key



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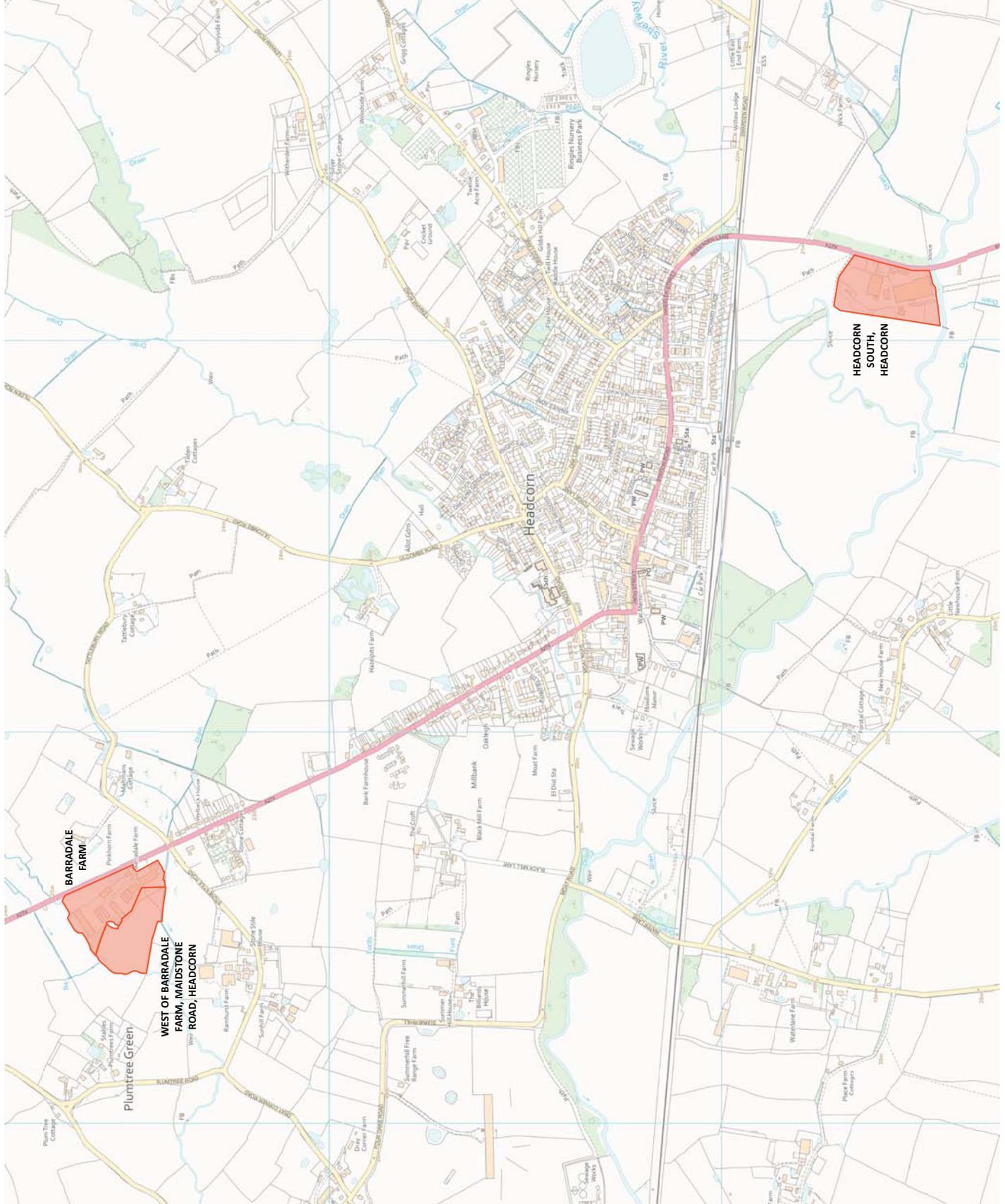
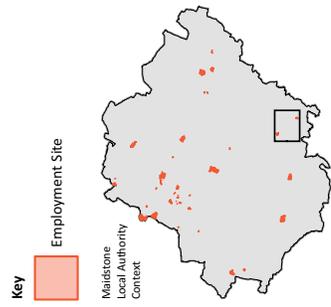
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Local Authority
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Client	Maldstone Borough Council
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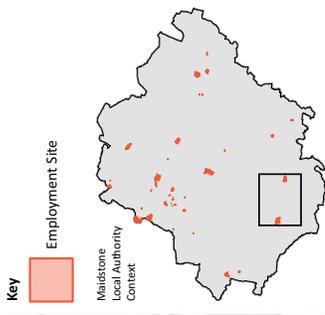
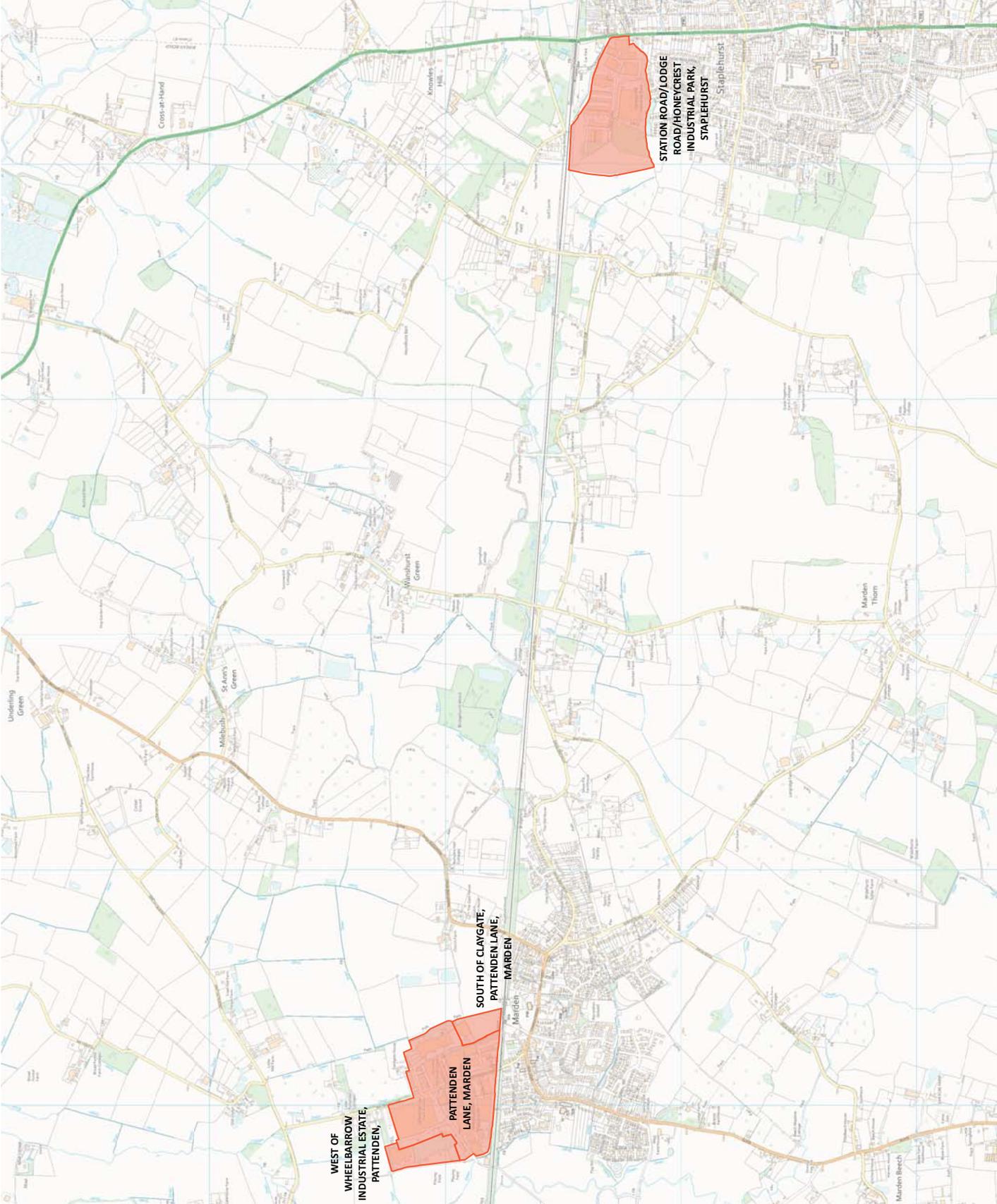


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Client	Maidstone Borough Council
Date	11.09.2019
Scale	1:15,000 @ A3
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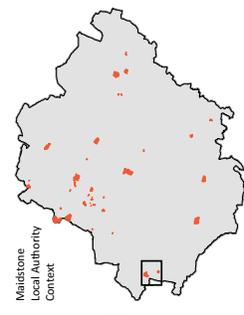
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Employment Site

Maldstone Local Authority

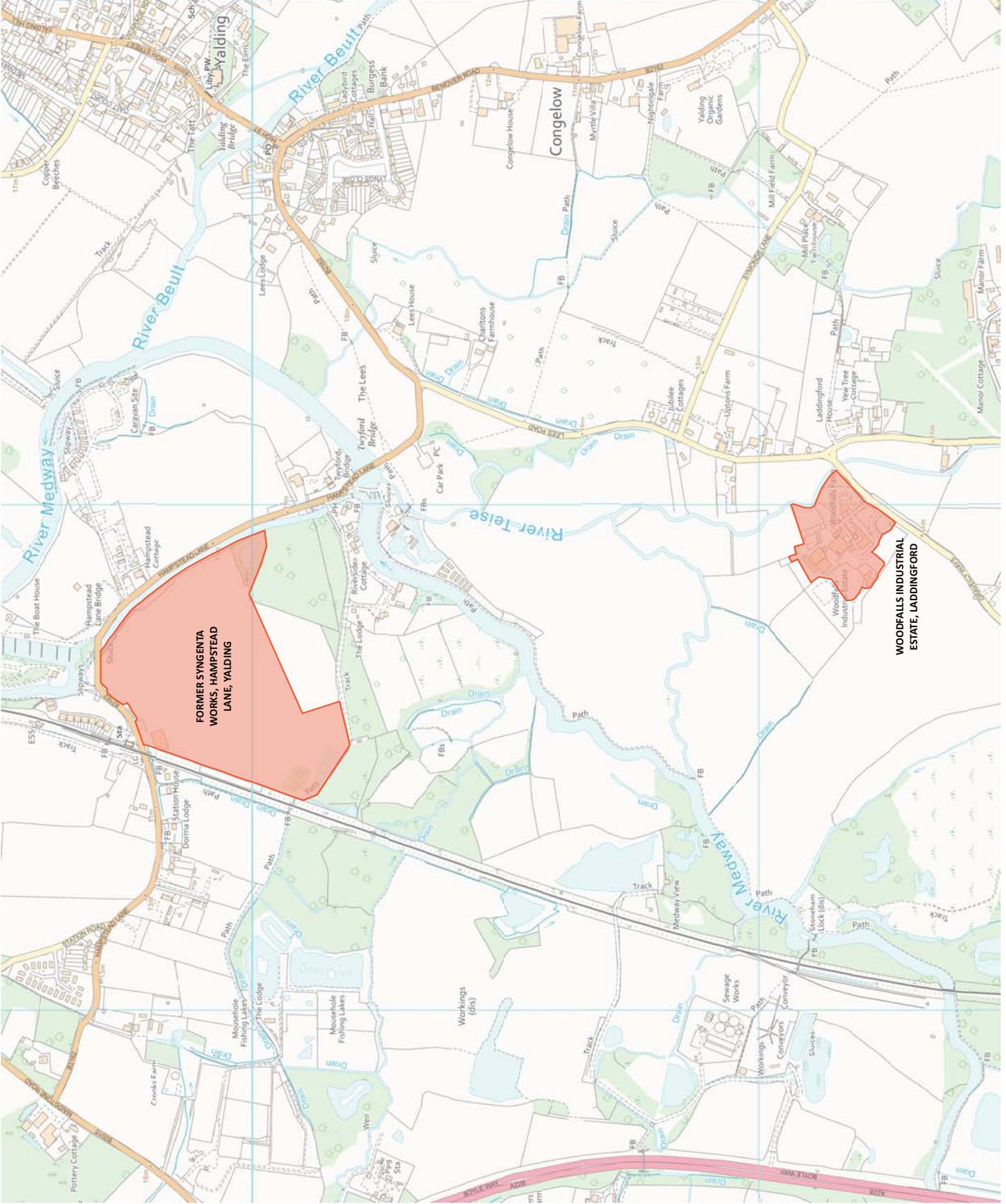
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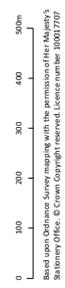
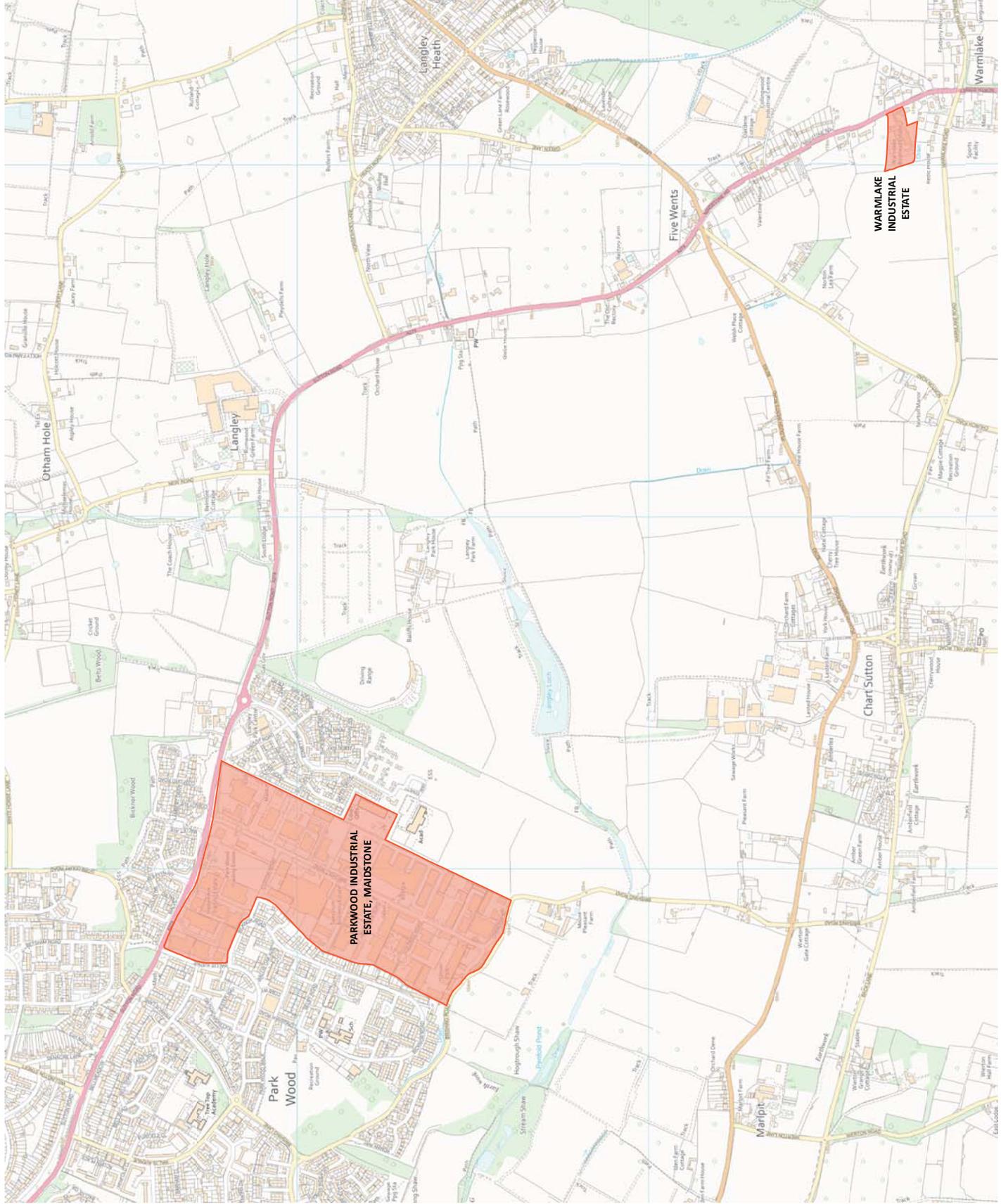
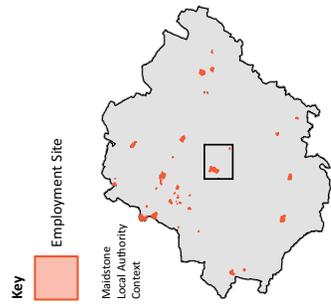


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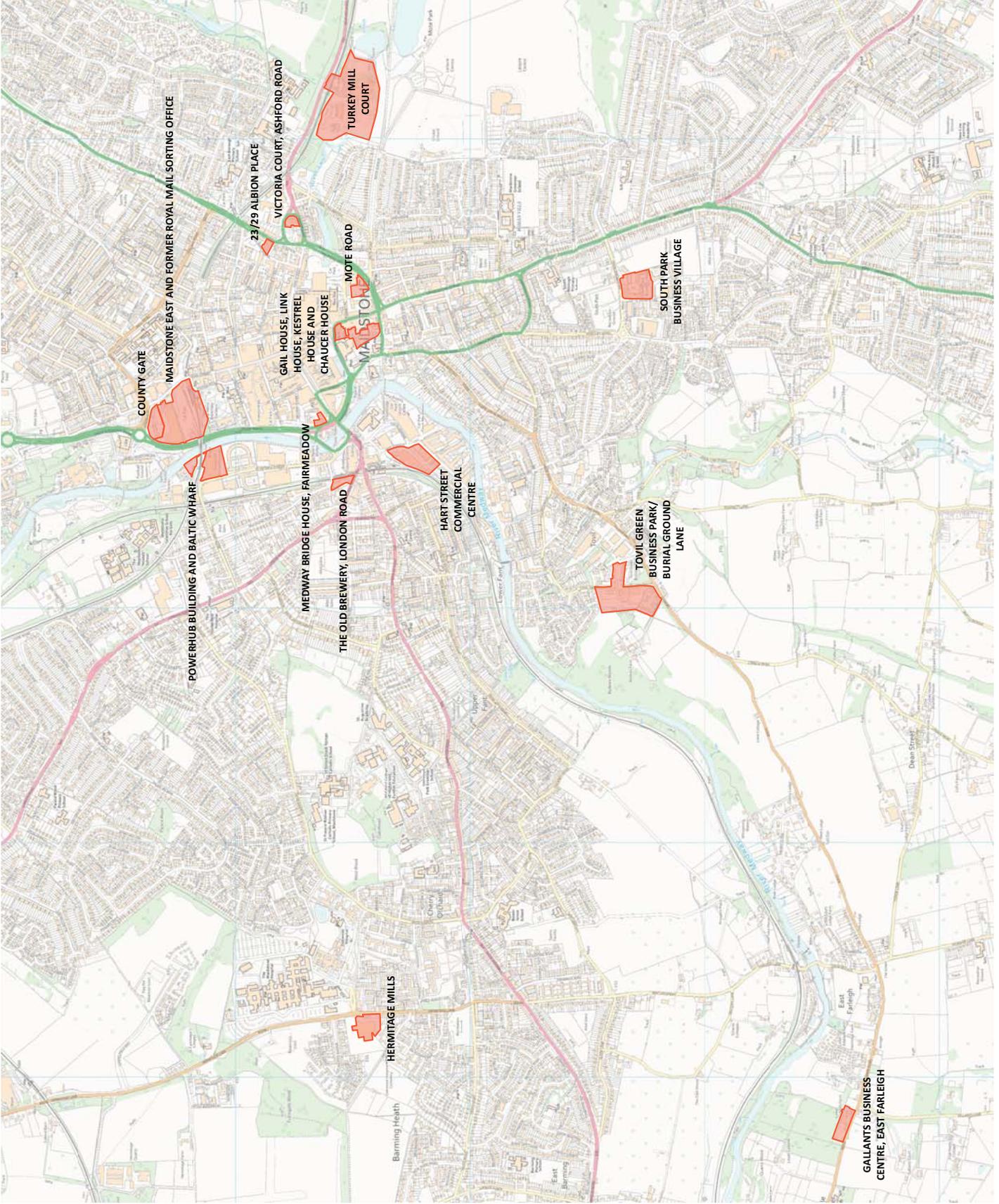
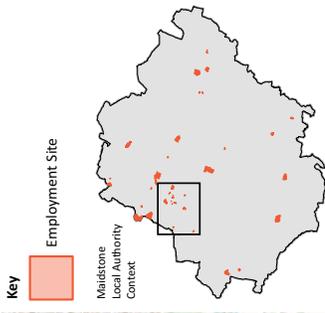




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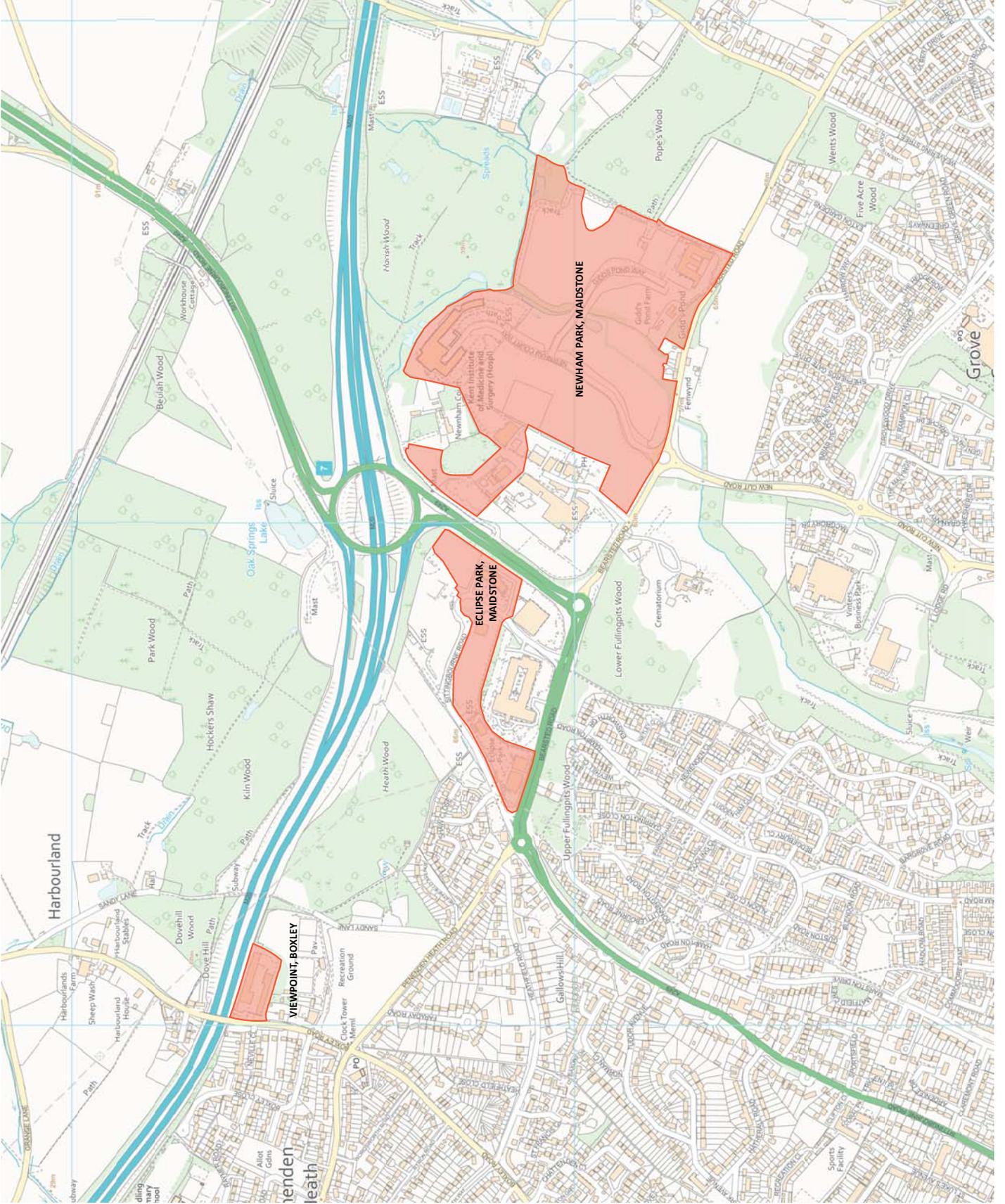
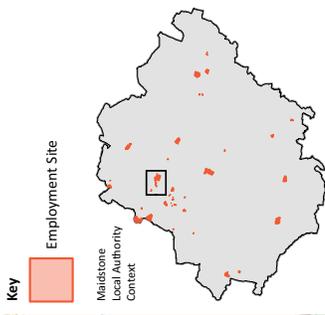
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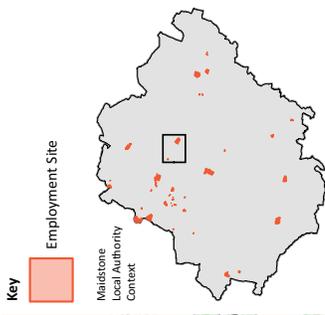
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Project	Maidstone EDMS
Title	Employment Sites
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Date	11.09.2019
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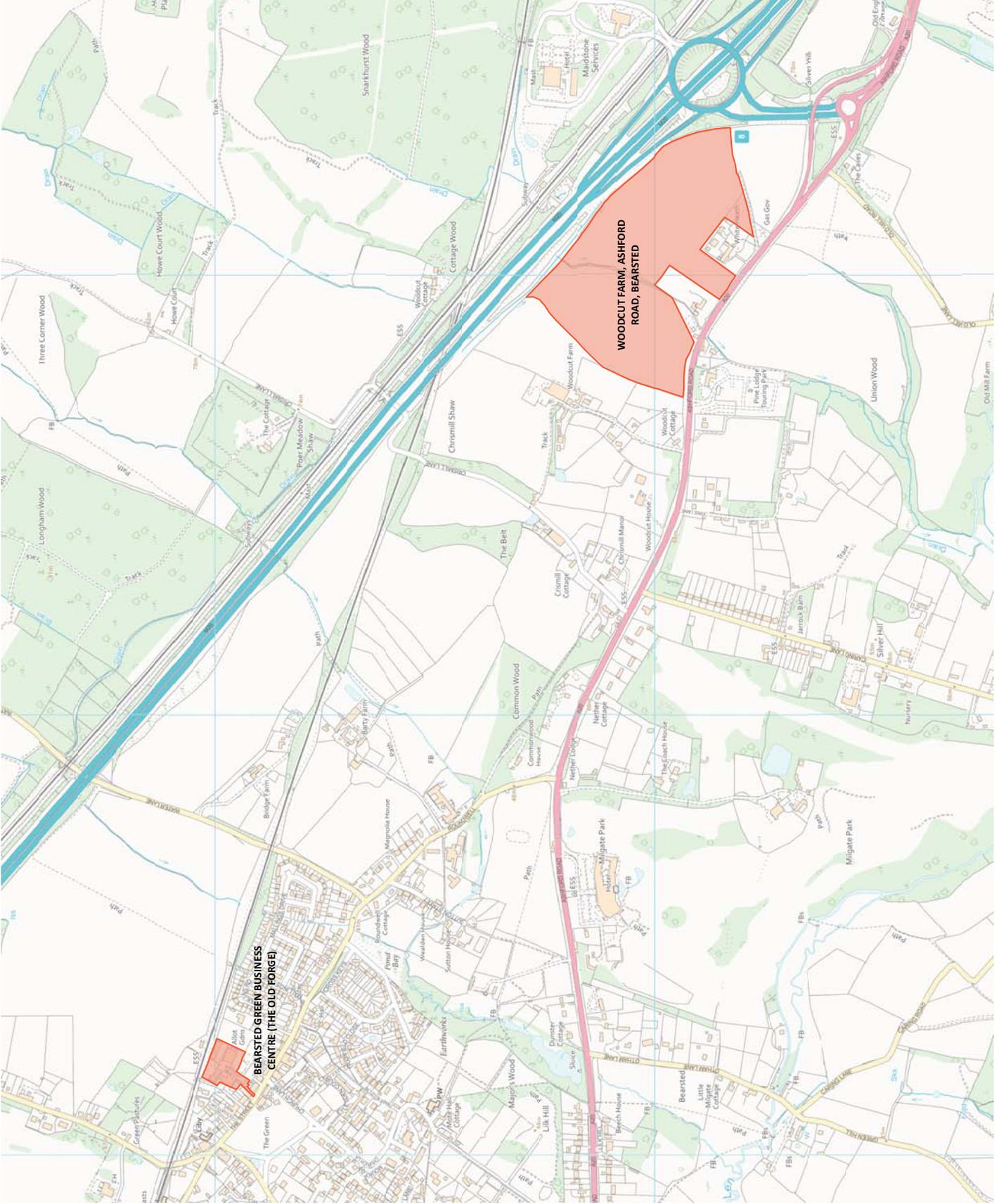
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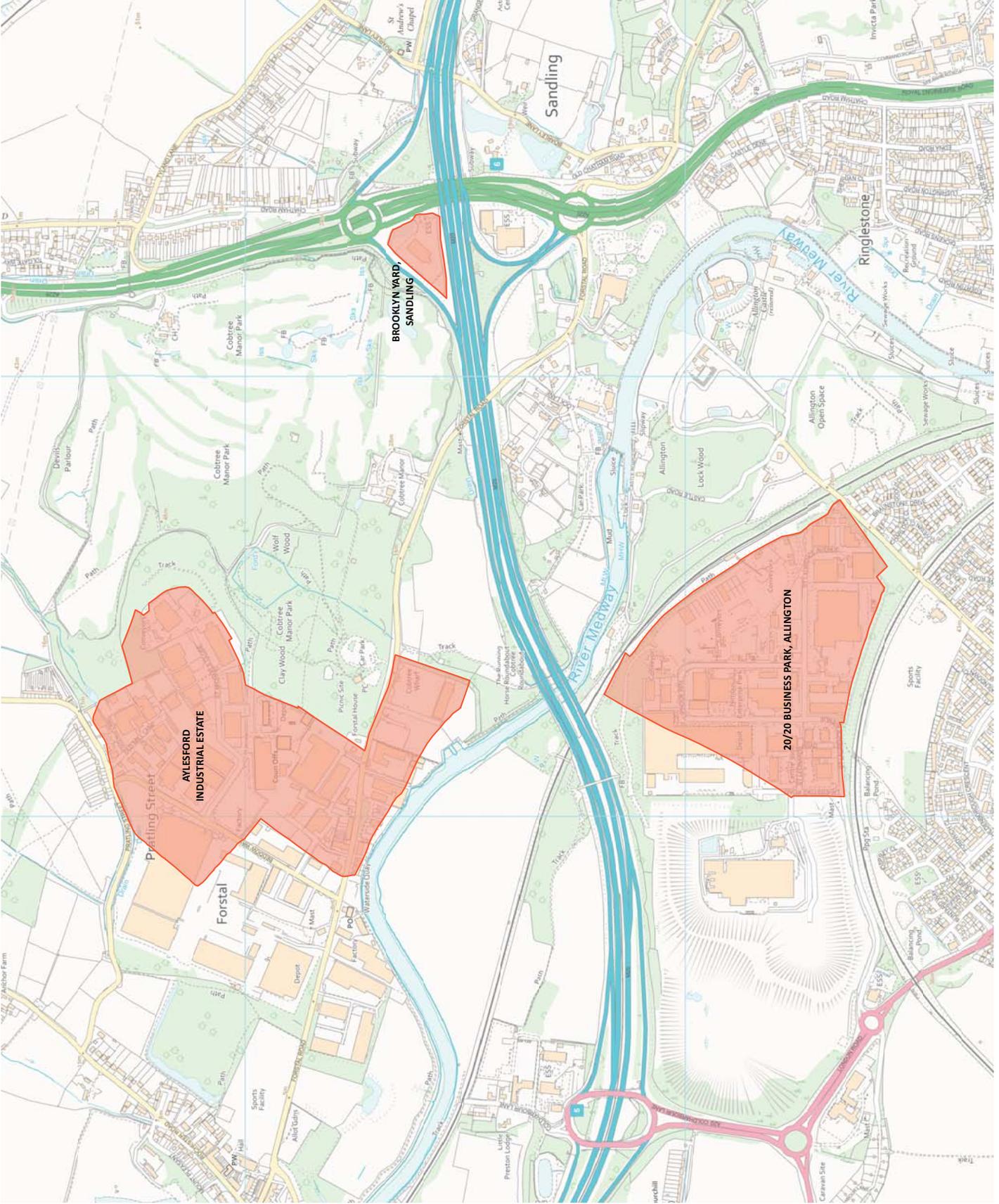
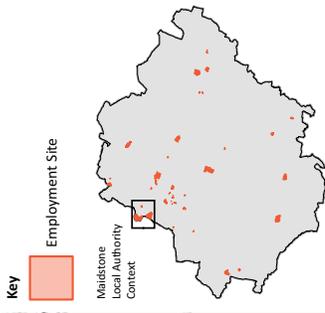
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Date	11.09.2019
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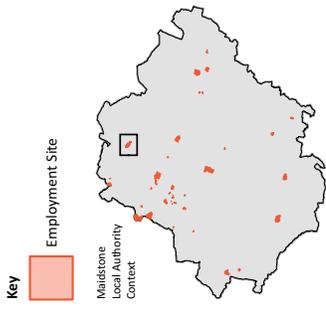


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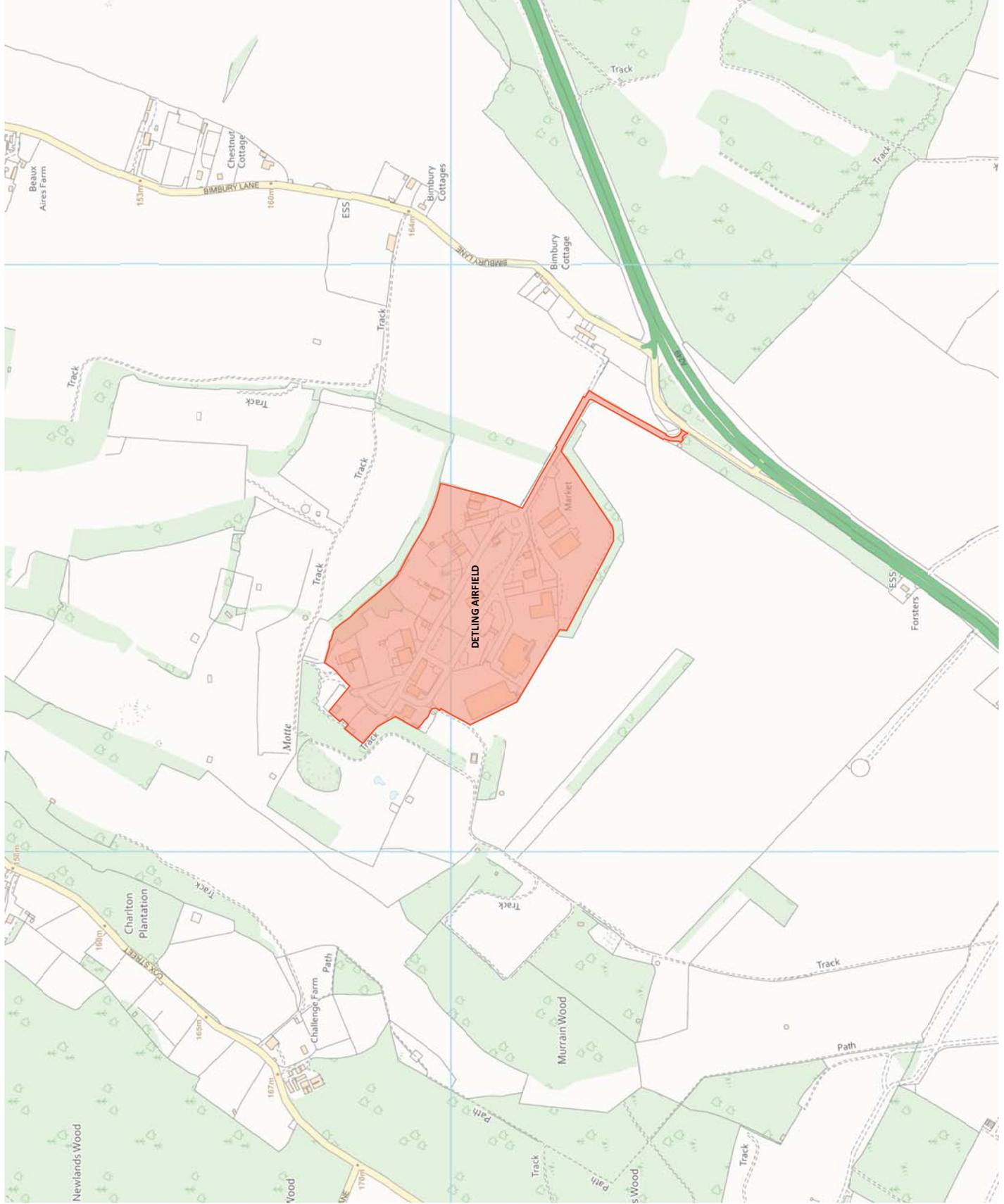


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Client	Maldstone Borough Council
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Appendix 8 Employment Site Assessment Criteria

The criteria for assessing the quality/condition of allocated and other existing sites are set out below. These criteria mainly relate to the inherent value of a site rather than current conditions on it, although such characteristics would also be noted. Additional criteria would apply to undeveloped allocated/development sites although ownership and availability information may not be possible to obtain in many cases and a judgement may need to be made on these.

Each site is given a score of between 1 and 5 against each criterion (1 = poor, 5 = very good). No individual weightings are attached to different criteria.

Scorings can reflect a combination of different factors applying to the same criteria and a balanced judgment has to be made on an appropriate overall score.

Strategic road access

5 = Very good: within 2 Km of strategic road junction/ via good unconstrained roads

1 = Poor: over 5 Km from strategic road junction/access, and/or through constrained/local roads, and/or through town centre or residential areas etc.

NB: Strategic road is typically defined as a motorway or A class trunk road

Local accessibility

5 = Very good local access: via free moving good roads avoiding residential areas/difficult junctions; unconstrained vehicle access to the site with good visibility/lack of queuing; close access to range of town centre public transport services

1 = Poor: difficult/narrow road access, via residential roads, difficult site access junction, congested local roads; low level/limited range/infrequent public transport services nearby

Proximity to urban areas and access to labour and services

5 = Very good: near centre of urban area with wide range of services nearby; proximity to sizeable residential areas providing local labour supply

1 = Poor: remote isolated site, no local services or residential areas nearby

Site characteristics and development constraints

5 = Very good: generally level site, regular shape, over 3 ha in size; low flood risk (Zone 1); no conservation or landscape constraints on scale of development; no adverse ground conditions or abnormal development costs; no other significant constraints on new development

1 = Poor: sloping/uneven site; under 0.5 ha, irregular/narrow shape, other severe constraints; within flood risk Zone 3; conservation or landscape constraints on scale of development; adverse ground conditions or abnormal development costs

Proximity to incompatible uses

5 = Within larger employment area/no incompatible surrounding land use

3-4 = B1 use adjoining residential/other sensitive uses

1 = B2/B8 adjoining residential/other sensitive uses

Market attractiveness

5 = Very good: high profile/high quality appearance, managed site; good environment and quality of occupiers; under 10% vacant; viewed as attractive by agents/occupiers; recent investment/development activity, strong demand, units rarely available

1 = Poor: run-down unattractive appearance/location; attracts lower end users and over 25% vacant space/buildings; vacant units not marketed; no recent investment; units remain vacant for lengthy period

Barriers to delivery

Identify any factors that would constrain development of the site for employment uses e.g. site occupied, need for infrastructure

Development potential

Identify any planning designations or policy constraints that could affect development of the site for employment use, as well as planning applications/consents

Appendix 9 Employment Site Assessment Matrix

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to Urban Areas & Access to Services & Networks		Proximity to Incompatible Uses		Site Constraints & Development Constraints		Market attractiveness	Total Working Foot (of 30)	Barriers to delivery	Vacant sites & Occupancy	Development Potential		
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment					Local Plan Allocation	Planning Application/ Permissions	
5	Newham Park 23.20	RMX(1)	Current Local Plan employment site allocation	5	The site has easy access to the A20 briefly via the A249	3	It is easily accessible by car and by foot. However there is a lack of immediate access to the main road. There is a bus stop further down the main road, however, there is no public transport access to the site and not near a train station	4	Site is located on outskirts of Maidstone town, there are shops and services on the road with more being built such as a large M&S.	5	There are new care facilities and a new hospital already on site, but they do not have any incompatible uses	3	The site is large at 23.20 ha and is spread out. Hilly topography in places, mainly fields.	5	High profile site near A20 and maintained with the M&S hospital already on site and in hospital recently opened with work still being completed to the site. Additionally there is a new care facility being built to open in 2020.	25	None obvious, although care facilities are being built out on part of the site.	Largely undeveloped but with some very modern care facilities	100,000sqm of medical uses, of which 25,000sqm is residential offices	13/11/18 approved outline application for medical campus up to 58,000sqm. Includes additional hospital facilities, clinics, rehabilitation centre (CDO), education and training facilities with residential accommodation for nurses and doctors (C3); premises for B&I ancillary services (B1) and up to 138 class (A1, A2 and A3) and up to 138 class C2 neuro-rehabilitation accommodation units - reviewed by 18/07/2021/OUT.
6	Maidstone East and former Royal Mail Sorting Office	RMX(2)	Current Local Plan employment site allocation	4	Located on the A20, this road leads up to the A20. However, the roundabout at the end of the road is heavily congested.	4	Adjacent to Maidstone East railway station. The site is near a number of main roads, which are heavily congested but have good access by car.	3	Easy access to Maidstone town centre, within walking distance to residential areas. The site is near the train station boundaries and in close proximity to bus stops.	5	The site is surrounded by a main road, train line, but no incompatible uses.	1	Small but regular site, however it is situated on a hill and is split across two main sites. Presence of train station and main roads provide constraints to future development.	4	High profile, prominent site in Maidstone town centre, near railway station and main roads. Scope for redevelopment to significantly enhance market attractiveness of site.	25	The site has an old train station already on the site with associated train tracks.	4,000sqm of B1A	Temporary permission for 3 years under 65/02/08/011 for min use B1 (973sqm gain of B1), B1 (1345sqm gain with 2713sqm loss) and A1 (400sqm gain) completed in previous year	
7	Ferret Works	RMX(4)	Current Local Plan employment site allocation	2	Access to A20 but along the A22B	3	The site is on the side of the site is very narrow, the site is not to value, there is no bus access.	2	Site is rather isolated from any major residential areas as well as from bus routes.	4	New residential build opposite the site.	4	The site is 13.94 ha and is mainly empty and run down building.	1	Run down and derelict premises on site. Relatively low profile site.	16	Apart from the adjacent train tracks there appears to be minimal barriers to future development.	Vacant/derelict	B class floorspace not specified. Proposals for raising Enterprise Park (public consultation on the 26th of Sept)	Site is allocated for around 8,600sqm of employment floorspace and approximately 200 dwellings
8	Power Hub Building and B&I Wharf	RMX(5)	Current Local Plan employment site allocation	3	Close to A20, but the Royal Engineers road that leads out of site is very busy and congested	4	Footpath dissects the site that leads to the river and Maidstone town. Close proximity to Maidstone Barracks train station. However, no accessible bus stop.	4	Located near to residential areas and the centre of Maidstone.	2	Adjoining residential uses to the site are indicated to the north.	2	Small site area (1.3 ha), split with the train track penetration through the site.	3	Site currently appears vacant/run down, in use by former B&I building. High profile given its location adjoining river and railway line.	18	Site is dissected with a train track, and adjoining power hub building, a heritage street and a listed building.	Existing buildings largely vacant/derelict.	B class floorspace not specified	13/02/21 granted permission for food store (240sqm) and ancillary unit (now expanded)

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to urban areas & services		Proximity to incongruous uses		Site characteristics & development constraints		Market attractiveness		Total Ranking (of 30)	Barriers to delivery	Vacant sites & Occupancy	Development Potential		
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Local Plan Allocation	Planning Applications/ Permissions	
9	Mede Road	RM01(6)	Current Local Plan employment site allocation	3	Situated on the A249, but on a very busy and congested section of the road in the town centre	3	Adjoining road is very busy and congested. There are a number of bus stops at the front.	5	Good proximity due to location within Maidstone town centre	5	It is part of a wider employment area within the town centre	4	None identified, apart from relatively small site size (0.39 ha)	5	High profile location within Maidstone town centre.	25	None obvious	Occupied by car park	Minimum of 2,000sqm B1a floorpace	NA	No current planning application
10	Lordswood Industrial Estate	SP22(1)(i)	Current Local Plan Economic Development Site Area	5	Very close access to the M20, via roads that are uncongested	3	Easy access by car, although no real obvious public transport nearby, it is situated within walking distance of the town centre.	4	Situated within Lordswood urban area with residential dwellings situated around the site and a number of services within walking distance including Tesco/pharmacy/ca etc.	3	Residential uses located to east of site.	4	Good site pH, slightly sloping.	4	Site appears to be well occupied and in demand amongst business occupiers.	23	None obvious	The site is mainly occupied, although there are some premises for rent or vacant	NA	NA	NA
11	Aylesford Industrial Estate	SP22(1)(i)	Current Local Plan Economic Development Site Area	5	Very close proximity to the M20, however the road that dissects the site is rather busy/congested.	4	Easy access by car, there is also a bus stop on the dissecting road. No public transport nearby, the nearest station is Aylesford about a mile away.	3	Close to a number of towns including Aylesford and Allington	4	There are a few residential dwellings sporadically around the site boundary.	4	Presence of the South East Water Plant facility that is on site.	4	Site appears to be popular and well used by business occupiers. Quality varies significantly from low value industrial units to distribution centre and Royal Mail depot.	24	None obvious	The site is mainly occupied, the water plant is vacant and the associated buildings are up for let.	NA	NA	NA
12	RD20 Business Park	SP22(1)(ii)	Current Local Plan Economic Development Site Area	5	Next to the M20 with easy access.	3	Easy access by car, the site is only a few minutes walk away, the nearest train station is Barming which is a 10 minute walk away	4	Near to Allington and Barming, a number of bus routes. Although access by foot from the residential area is poor, there are shops, services and shops near or close, the pub/hotel is the only service nearby	4	Residential uses located to south of site.	4	Large site area with good site pH. There is a large concrete making facility which is situated on uneven ground with heavy industry.	4	Well maintained and high profile area, well occupied, there are some vacant units (e.g. recycling centre)	24	None obvious	The site is mainly occupied, around 30% of the site is however vacant (some of vacant/defunct site)	NA	NA	NA
13	Parkwood Industrial Estate	SP22(1)(iv)	Current Local Plan Economic Development Site Area	3	Next to the M20, access to the M20 is via small and congested roads	3	Easy access by foot and by car, however not in close proximity to a train station, no noticeable bus stops.	3	Close proximity to large residential areas and some services	1	The site adjoins residential uses to the east and west	5	Site is flat and relatively well kept.	5	The site is well occupied, and is home to a number of high profile companies such as Ferran, Trans Systems and Regardale.	20	New residential dwellings being built adjoining site, so limited scope for expansion.	Occupied	NA	NA	NA

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to urban areas & services		Likelihood to be incompatible with		Site constraints & development constraints		Market attractiveness		Total Ranking (out of 30)	Barriers to delivery	Vacant sites & Occupancy	Development Potential	
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Rank (out of 5)	Comment
14	3.26	SP22(1)(v)	Current Local Plan Economic Development Site Area	3	Site is situated on the opposite side of Maidstone to the A20, via a small and congested road.	3	Bus stop nearby but site is not near a train station. The site is also accessible by road although the road is congested.	4	Located on the edge of Maidstone. There are a number of shops/facilities within walking distance.	3	Residential uses to north of site.	3	Sloping topography. The site is constrained at the top by a cemetery.	1	The site appears to be run down with a number of derelict and vacant buildings. A recent aerial photo of the site appears to be poor quality.	17	None obvious	Mainly occupied, but with some vacant looking buildings, scope for intensification on site.	NA	NA
15	53.3	SP22(1)(vi)	Current Local Plan Economic Development Site Area	2	The site is located near the A235, however it is a 30 minute drive to the M20	3	Site is easily accessed by car and adjacent to Staplehurst train station. There are no obvious bus stops at the end of the site	3	Located on the edge of Staplehurst which is a small used town. There are no obvious bus stops within walking distance of the site.	3	The site borders the train station and train tracks as well as residential and a field at the back.	4	Sloping topography in places.	3	The site has obvious vacant, derelict and run down buildings. Also high profile occupiers in the Amethyst Group Building	20	None obvious	Occupied	NA	NA
16	18.71	SP22(1)(vi)	Current Local Plan Economic Development Site Area	2	Relatively close to the A235 which has direct access to the A20, but still 30 minute drive to M20	4	Site is easily accessed by car and also located very close to Maidstone South-eastern station which has no obvious bus stops. However there are no obvious bus stops on the road that runs through the site.	3	Adjacent to the edge of Maidstone, also relatively near Staplehurst which is the next stop on the train.	5	Residential uses to north of site of railway line to the site.	4	Relatively large and regular on site. However the farm track on one side.	4	Generally well occupied and high quality. However the farm track location within Maidstone Borough context.	22	None obvious	Occupied	NA	NA
17	11.70	SP22(1)(vi)	Current Local Plan Economic Development Site Area	4	Isolated mid-way between M2 and M20	2	The site is isolated, no transport or access to the town centre. Although the site is easily accessible by car, it is not easily accessible by foot. There are also no services within walking distance.	2	No urban areas in proximity but site is isolated relatively near to Maidstone town.	5	No incompatible uses adjoining the site.	4	The site is a good size and the site is generally flat however in places the ground is unstable and not levelled over.	2	Mixed quality accommodation but the site is well located due to its isolated location.	19	None obvious	Occupied	NA	NA
18	8.99	SP22(1)(vi)	Current Local Plan Economic Development Site Area	4	Good access to the A20.	4	Located near to the M20 and there are bus stops nearby. It is easily accessible by car although the road is congested.	3	Located on the edge of Maidstone town which has some services on offer.	1	Residential uses adjoining 2 sides of site.	5	No obvious constraints.	4	The site is very busy and is located in a prime location for the main employment site in the town.	21	None obvious	The site is 100% occupied by Latham Storage	NA	NA

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to urban area & access to buses & services		Proximity to incompatible uses		Site constraints & development constraints		Market attractiveness		Total weighting (of 30)	Barriers to delivery	Vacant sites & occupancy	Development potential	
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Rank (out of 5)	Comment
19	2.75	SP22(1)(c)	Current Local Plan Economic Development Site Area	4	The site is just off the A26, which provides quick access onto the M20.	3	There is a bus stop at the end of the road that provides services into the town. The road that surrounds the site is very narrow and congested.	3	Site is situated on the edge of the small town of Maidstone, which has good local amenities.	3	Some scattered residential uses surrounding the site.	4	Good size site (22.75ha), relatively compact and regular shape, with some residential uses. Some residential uses sporadically distributed along the boundary of the site.	5	Site fully occupied by single employer (Minsky Plumbing & Drains)	22	None obvious	100% Occupied	NA	NA
20	2.66	SP22(1)(c)	Current Local Plan Economic Development Site Area	2	Relatively near the M20, but the access road is narrow. Also near the A229	2	The connecting road is narrow, no direct public transport, it is relatively near to the main train station.	2	Relatively remote, although down the road from Headcorn, and not far from the main bus stops.	5	No major towns, small amount of residential next to the site and some farms. But is mainly surrounded by fields	4	Small site size (2.66ha) but flat and a regular shape	3	The site is well maintained and the warehouses appear to be in good condition. Relatively peripheral/secondary market location.	18	None obvious	100% occupied	NA	NA
21	0.84	SP22(1)(c)	Current Local Plan Economic Development Site Area	4	Although the site is located near to the M20, the access road is narrow and is around a 10 minute drive away	4	Located adjacent to mainline train station, accessible by both car and foot. There are bus stops near by on the main road.	3	Adjacent to town of Maidstone, but with some small local shops and minimal services.	1	Surrounded by housing and some fields and scattered train tracks.	2	Small site size (0.84 ha) with sloping topography. It is surrounded by a number of roads that link the site to the rest of the town	2	The site appears rather old and run down, it is occupied by low quality buildings. It is surrounded by a number of roads that link the site to the rest of the town. The main road is marked with "no left" signs outside.	16	None obvious	Around 70% occupied, the largest premises appears to be vacant	NA	NA
22	0.93	SP22(1)(c)	Current Local Plan Economic Development Site Area	4	Although the site is located directly next to the A26, the access road and junction is a short drive away.	3	Easy access by car and by foot but the site is not directly adjacent to any strong public transport links	4	Located at the edge of Maidstone, but with some small local shops, labour and services	3	Some residential uses located across the road from the site	3	Small site size (0.93ha), relatively narrow and elongated.	3	Site appears to be well occupied, comprising of a number of small units. Not a very high profile site.	20	None obvious	Occupied	NA	NA
23	2.69	SP22(1)(c)	Current Local Plan Economic Development Site Area	4	Site is located on the A20 which provides quick access to the M20 in around 10 minutes.	2	Limited public transport, bus stops around 10 minute walk away and there are no local train stations near by. The site is easily accessible by car.	2	Located just outside of town which has a few services.	5	No incompatible uses adjoining the site	2	The site is triangular in shape and is surrounded on both sides by roads.	2	The site has some noticeable vacant premises in location and low profile site.	17	None obvious	Around 70% occupied, some scope for reindustrialisation on site.	NA	NA

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to urban areas & access to buses & services		Proximity to incompatible uses		Site constraints & development constraints		Market attractiveness		Total Ranking (out of 30)	Barriers to delivery	Vacant sites & occupancy	Development Potential	
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Local Plan Allocation	Planning Applications/ Permissions
24	0.88	SP22(1)(vi)	Current Local Plan Economic Development Site Area	4	Although this site is located near to the M20, access to junction 8 is around a 10 minute drive away.	4	Easy access by both car and by foot. Hammersham train station and bus stops are located nearby.	3	Adjacent to town of Hammersham which offers a good labour force and retail services.	1	Residential uses adjoining two sides of site.	4	Relatively small site size (0.88ha).	3	The site is relatively well presented and houses the Kent Local Medical Committee as well as B&M Nuttall.	15	None obvious	Occupied	NA	NA
25	1.50	SP22(1)(vi)	Current Local Plan Economic Development Site Area	3	The site is situated near the A229/A249 and the A20 which lead to the M20. However, to do so you need to travel through a heavily congested and residential area.	3	Although there is good access by car, the junction that the site is situated near is very busy, and therefore difficult to navigate.	5	Located in Maidstone town centre to labour and local services.	1	Residential uses surround 2 sides of site.	3	The site is 1.5ha in size, and is flat and regular shaped. However the potential for further development outside of the site boundary is limited.	4	The site is well maintained and occupied. Mainly consists of showrooms and large warehouses & self storage facilities.	15	None obvious	Occupied	NA	NA
26	0.98	SP22(1)(vi)	Current Local Plan Economic Development Site Area	4	Around 5 minute drive onto the M20, accessed along E2466 then the A20.	4	Easily accessible by car and foot although adjacent road is narrow. Main train station is a short walk down the road.	4	Situated on outskirts of Maidstone, there is a mix of residential being built next to the site. Services nearby with a Tesco opposite the site and a hospital down the road.	1	Adjacent to residential uses (both new build and existing housing stock).	3	Site is relatively small, just 0.98ha, also has a slight incline.	3	All occupied but site did not appear to be very busy. Secondary market location.	15	None obvious	All occupied	NA	NA
27	0.74	SP22(1)(vi)	Current Local Plan Economic Development Site Area	4	Located near the M20, although the roads to reach it are very narrow and congested.	3	Located within walking distance from Bearsted train station. Bus stop situated at the bottom of the drive to the site. However, the local roads are narrow and congested. The drive up to the site is narrow and therefore restricts larger vehicles.	4	Situated in the centre of Bearsted, but also close to the town of Bearsted offers basic services with a few shops.	1	Residential uses surround 2 sides of the site.	3	Small site size (0.74ha), adjoining railway line and residential uses.	2	Mixed quality of accommodation on site and some vacant buildings. Located in secondary market location.	17	None obvious	All occupied	NA	NA
28	0.70	SP22(1)(vi)	Current Local Plan Economic Development Site Area	3	The M20 is around 15 minute drive away.	2	Relatively easy access by car. Bus stop located nearby. Difficult to access by foot.	2	Relatively isolated, although near some residential.	4	Nearby residential uses but not adjoining.	4	Small site that is relatively flat and regular in shape.	2	Seems mainly occupied, with some small sites available to let. Located near Bearsted by M20 and an events company.	17	None obvious	Mainly occupied	NA	NA

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to Urban Areas & Access to Services		Likelihood of Incompatible Uses		Site Constraints & Development Constraints		Market Attractiveness		Total Ranking (out of 30)	Barriers to Delivery	Vacant Sites & Occupancy	Development Potential		
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Rank (out of 5)	Comment	Local Plan Allocation
29	Headcorn South	3.37	SP221(xvi)	Current Local Plan Economic Development Site Area	2	Relatively far from main/strategic roads, the nearest main road is the A229 which is a 20 minute drive away.	2	The site is easily accessed by car, although public transport access is poor (train station 15 minutes walk away (no footpath)).	3	The site is situated just outside small town of Headcorn which is a mix of shops and cafes plus surrounding residential housing.	5	No incompatible uses adjoining the site but there is some residential use on part of site.	4	Small site that is relatively flat and regular in shape.	4	This site is occupied, appears to be busy and accommodating high quality stock. Secondary market location.	20	None obvious	Fully occupied	NA	NA
30	Woodlith Industrial Estate	3.01	SP221(xvi)	Current Local Plan Economic Development Site Area	2	Site is close to A229 which leads up to the M20	3	Easy access to site by car, driving/yielding train stations nearby, although no bus access	2	Relatively remote site, near to a few small villages/villages services nearby.	2	No incompatible uses adjoining the site but there is some residential use on part of site.	4	Relatively flat regular shape. No obvious constraints.	3	Site accommodates a mix of brick offices and warehousing/storage. Appears to be well occupied but secondary market location.	16	None obvious	Occupied	NA	NA
31	Weymouth Industrial Estate	1.17	SP221(xvi)	Current Local Plan Economic Development Site Area	4	Reasonably close proximity to the M20 via B2163	2	Equally accessible by car, however no bus stop or train station nearby.	2	Next to the small settlement of Weymouth, but limited access to services/amenities nearby.	2	Residential use to one side of site.	4	Relatively flat regular shape. No obvious constraints.	3	Mixed quality of stock uses the site, including shops and architects. Appears to be well occupied but relatively secondary market location.	17	None obvious	Occupied	NA	NA
32	Bredhurst Business Park	0.71	SP221(xviii)	Current Local Plan Economic Development Site Area	3	Site situated very close to the strategic road, via narrow and congested road.	2	Site not accessible by car, although access is relatively easy by car.	2	Limited access to services/amenities although close to residential area of Luttwood.	3	Residential use to one side of site.	4	Relatively flat regular shape. No obvious constraints.	2	Business accommodation (mostly of relatively secondary warehousing/workshop premises. Site appears to be congested with insufficient parking. Year of site includes some vacant units/strays. Low profile site.	16	None obvious	Occupied	NA	NA
33	The Old Brewery	0.29	SP221(xviii)	Current Local Plan Economic Development Site Area	3	The site is located near the A229 via a very congested junction leading to the M20.	4	Relatively good local access although road out front is very busy and congested. Near to bus stop and train station.	3	Situated in Maidstone town centre so good access to labour and services.	5	Surrounded by other commercial uses.	2	Site is well served by an adjoining railway line and roads.	3	Site appears to be well occupied and has a particularly high profile.	22	None obvious	Occupied	NA	NA
34	Brooklyn Yard	1.44	SP221(xviii)	Current Local Plan Economic Development Site Area	5	Excellent strategic road access, located at the junction of A229 and M20	3	Very good access by car, public transport access is poor with no bus or train services nearby.	3	The site is located just outside Maidstone town, and although it is not directly accessible for the population of Maidstone by car, limited services nearby.	5	No incompatible uses adjoining site.	3	Irregular (triangular) shaped site surrounded by main roads.	5	The site has a modern appearance and looks well maintained. All occupied by Scania with heavy storage on site.	24	None obvious	Occupied	NA	NA

Maidstone Economic Development Needs Study: Appendix 9 Employment Site Assessment Matrix

Site Ref	Site Size (ha)	Policy Status	Local Plan Allocation	Strategic Road Access		Local Accessibility		Proximity to urban area & access to buses & services		Proximity to incompatible uses		Site constraints & development constraints		Market attractiveness		Total Ranking (out of 30)	Barriers to delivery	Vacant sites & occupancy	Development potential		
				Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment	Rank (out of 5)	Comment				Rank (out of 5)	Comment	Local Plan Allocation
35	South Park Business Village	1.44	SP22(2)(i)	Current Local Plan Economic Development Site Area	3	Situated just a few miles from M20 however access is via the A227 which is very congested and slow.	3	Early accessible by car and foot, however the site is 3.5 miles away from the bus stop and is not located near a train station.	4	Situated within Maidstone town to close to labour (limited services nearby).	3	Residential use defines two sides of site.	4	Small site that is relatively flat and regular in shape.	3	Office site appears to be well maintained and generally occupied although a number of units are vacant. Secondary market location on fringe of town.	20	None obvious	Approximately 70% occupied	NA	NA
36	Turkey Mill Court	6.77	SP22(2)(ii)	Current Local Plan Economic Development Site Area	3	Despite being situated on the A20, the route to the M20 via the A20 is heavily congested.	3	Site is not situated near a train station (reasonable walk to bus stop). There are bus stops at the top of the site. Easy access by car, however, large parking area may be restricted due to the turns/narrow way access off the A20 for both car and by foot with a variety of bus stops on the main road nearby. No train station nearby.	4	Located within Maidstone town to close to labour (services nearby).	4	Some residential uses nearby.	4	Reasonable sized site of good shape but some sloping ground. There are a number of ponds on site that could hinder further development.	5	This site is well maintained and attractive, relatively quiet but well occupied. On site there are a number of units with management company and a nursery as well as having the "Orangery" wedding venue on site.	23	None obvious	All occupied	NA	NA
37	Edgemoor Park	4.05	SP22(2)(ii)	Current Local Plan Economic Development Site Area	5	Situated on the A20, directly next to the M20 with very easy access.	4	Easy access off the A20 for both car and by foot with a variety of bus stops on the main road nearby. No train station nearby.	4	Situated on the edge of Maidstone, to good access to labour and services.	3	Some residential uses nearby but mainly surrounded by commercial uses.	4	Reasonably sized and shaped site with no obvious development constraints.	5	Commercial premises on site look well presented, modern and occupied. Primary employment site in railway location to Maidstone.	25	None obvious, apart from non B class uses being developed on site.	What is currently built is occupied	There is a large amount of development ongoing, with a large M&S food hall being developed on the corner of the site. Residential dwellings also being built.	NA
38	County Gate	0.68	SP22(2)(iv)	Current Local Plan Economic Development Site Area	4	Very busy and congested roundabout that leads up to junction 6 of the M20.	5	Easy access via local roads by car and bus. Many public transport services nearby including Maidstone East train station and bus stop.	5	Situated in Maidstone town centre so very good access to labour and services.	5	No incompatible uses adjoining site.	4	Small site but no obvious development constraints.	4	High profile, prominent site in Maidstone town centre, close to railway station and main roads.	27	None obvious	Occupied	NA	NA
39	Medway Bridge House	0.17	SP22(2)(iv)	Current Local Plan Economic Development Site Area	4	Situated on the A229 which leads up to the M20. Site is located on a busy and congested junction.	5	Early accessible by car and foot with bus stop nearby. Maidstone East train station just a short walk away. The site is also situated close to the town centre.	5	Situated in Maidstone town centre so very good access to labour and services.	5	No incompatible uses adjoining site.	2	Small site constrained by main building and surrounding employment sites. There is a raised car park at the back of the building.	4	The site is relatively well presented and appears to be occupied. The developer is a local business (Kent & Medway Partnership) that are aware, with 'to let' signs. High profile town centre site.	25	None obvious	Around 50% occupied	NA	NA
40	23/29 Albion Place	0.17	SP22(2)(vi)	Current Local Plan Economic Development Site Area	3	Site is located on the junction 7 on the M20 but access is through congested roads.	3	Good access by foot and via public transport. However by car it is congested and difficult roundabout. Site also provides little to no parking.	5	Situated in Maidstone town centre so very good access to labour and services.	3	Some residential uses nearby.	2	Small site which is relatively constrained by adjoining uses.	4	Site is well presented, occupied by boots and the NHS (Kent & Medway Partnership). Relatively high profile town centre site.	21	None obvious	100% occupied	NA	NA
41	Victoria Court	0.22	SP22(2)(vi)	Current Local Plan Economic Development Site Area	4	Site is located on the junction 7 on the M20 but access is through congested roads.	3	Good access by foot and via public transport. However by car it is congested and difficult roundabout. Site also provides little to no parking.	5	Situated in Maidstone town centre so very good access to labour and services.	3	No incompatible uses adjoining site.	2	Small site which is relatively constrained by adjoining uses.	4	Well presented, and fully occupied. High profile town centre site.	23	None obvious	100% occupied	NA	NA
42	Gall House, Link House, Kestrel House and Chancer House	1.00	SP22(2)(viii)	Current Local Plan Economic Development Site Area	4	Situated on the A20, but on a very busy and congested section of the road in the town centre.	3	Access is constrained due to busy adjoining roads, and limited bus service. Number of bus stops in front of site.	5	Situated in Maidstone town centre so very good access to labour and services.	3	Some residential uses nearby.	2	Small site which is relatively constrained by adjoining uses.	3	Mixed quality business accommodation and some vacancy evident. Relatively high profile town centre site.	20	None obvious	Some vacancy	NA	NA

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