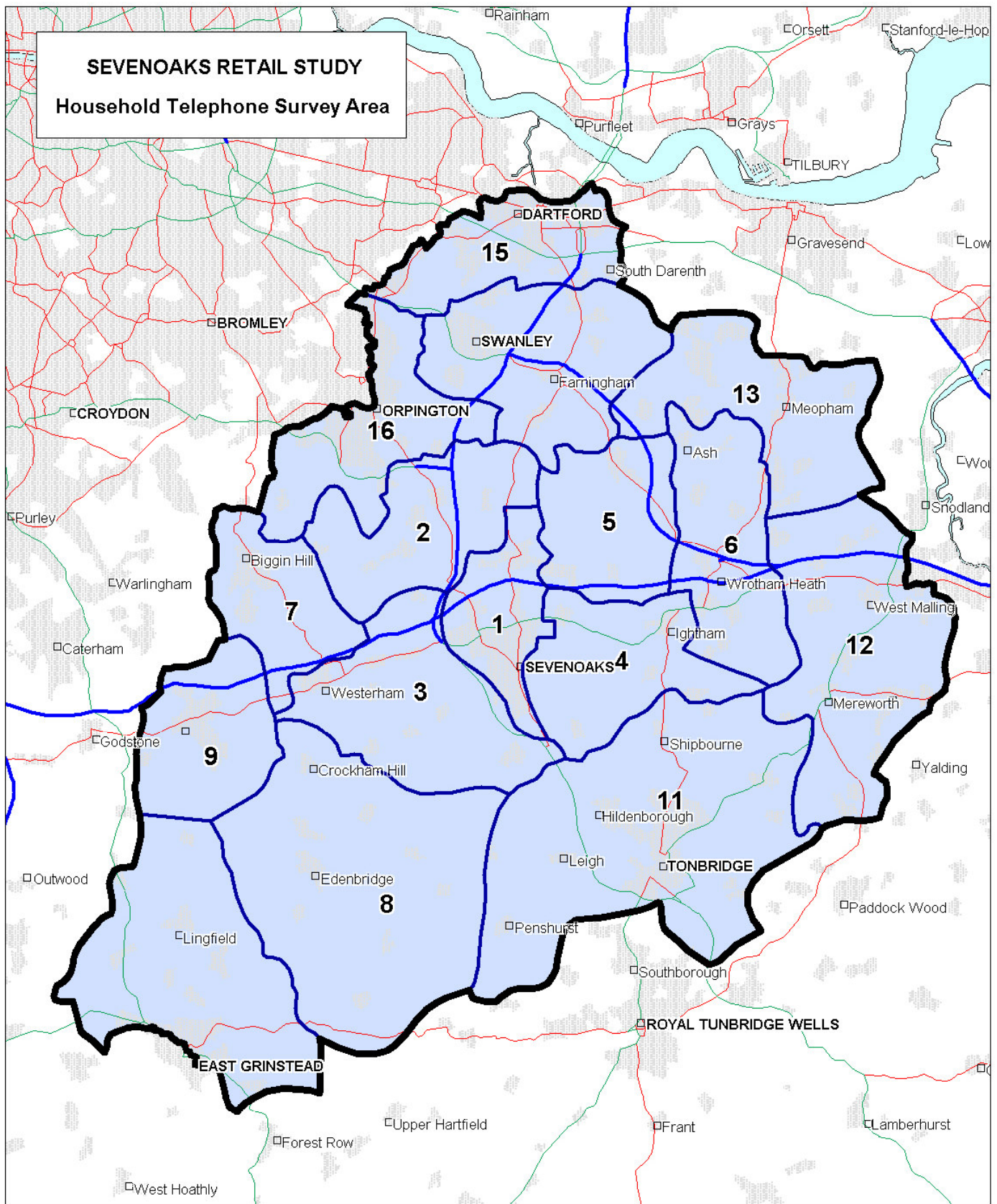

PLAN 1




HOUSEHOLD TELEPHONE SURVEY AREA

SEVENOAKS RETAIL STUDY

Household Telephone Survey Area



KEY

-  Study Area Boundary
-  Survey Zone
-  Urban Area

Zone	Postal Sectors
1	TN13 1/2/3, TN14 5
2	TN14 7
3	TN14 6, TN16 1
4	TN15 0/9
5	TN15 6
6	TN15 7/8
7	TN16 2/3

Zone	Postal Sectors
8	TN8 5/6/7
9	RH8 0/9
10	RH7 6, RH19 2/3
11	TN9 1/2, TN10 3/4, TN11 0/8/9
12	ME18 5, ME19 4/5/6, TN12 5
13	DA3 7/8, DA13 0
14	BR8 7/8, DA4 0/9

Zone	Postal Sectors
15	DA1 1/2/3, DA2 6/7, DA5 2, DA14 5
16	BR5 3/4, BR6 6/7/9

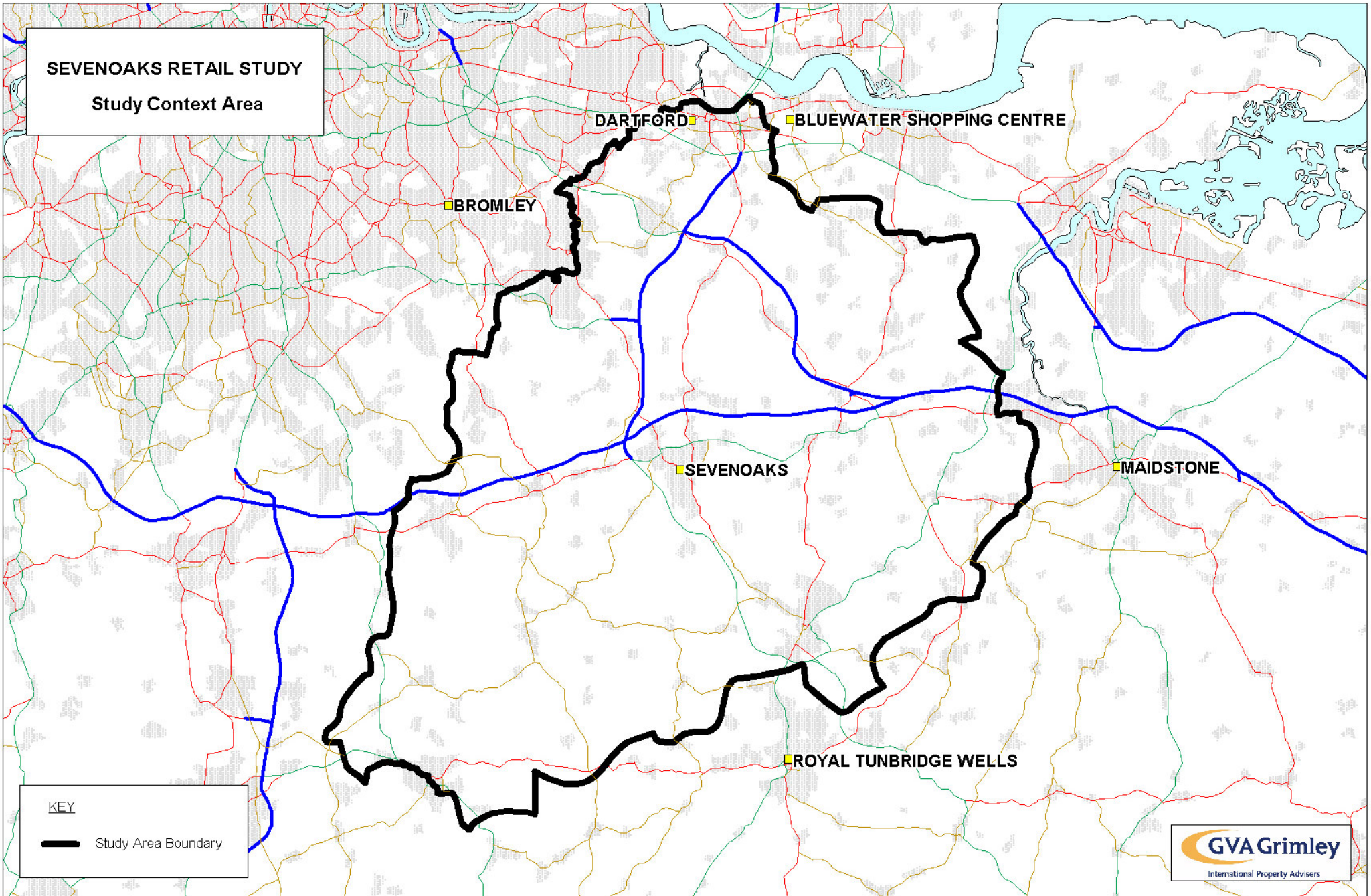


PLAN 2

SEVENOAKS RETAIL STUDY: STUDY CONTEXT AREA

SEVENOAKS RETAIL STUDY

Study Context Area



KEY

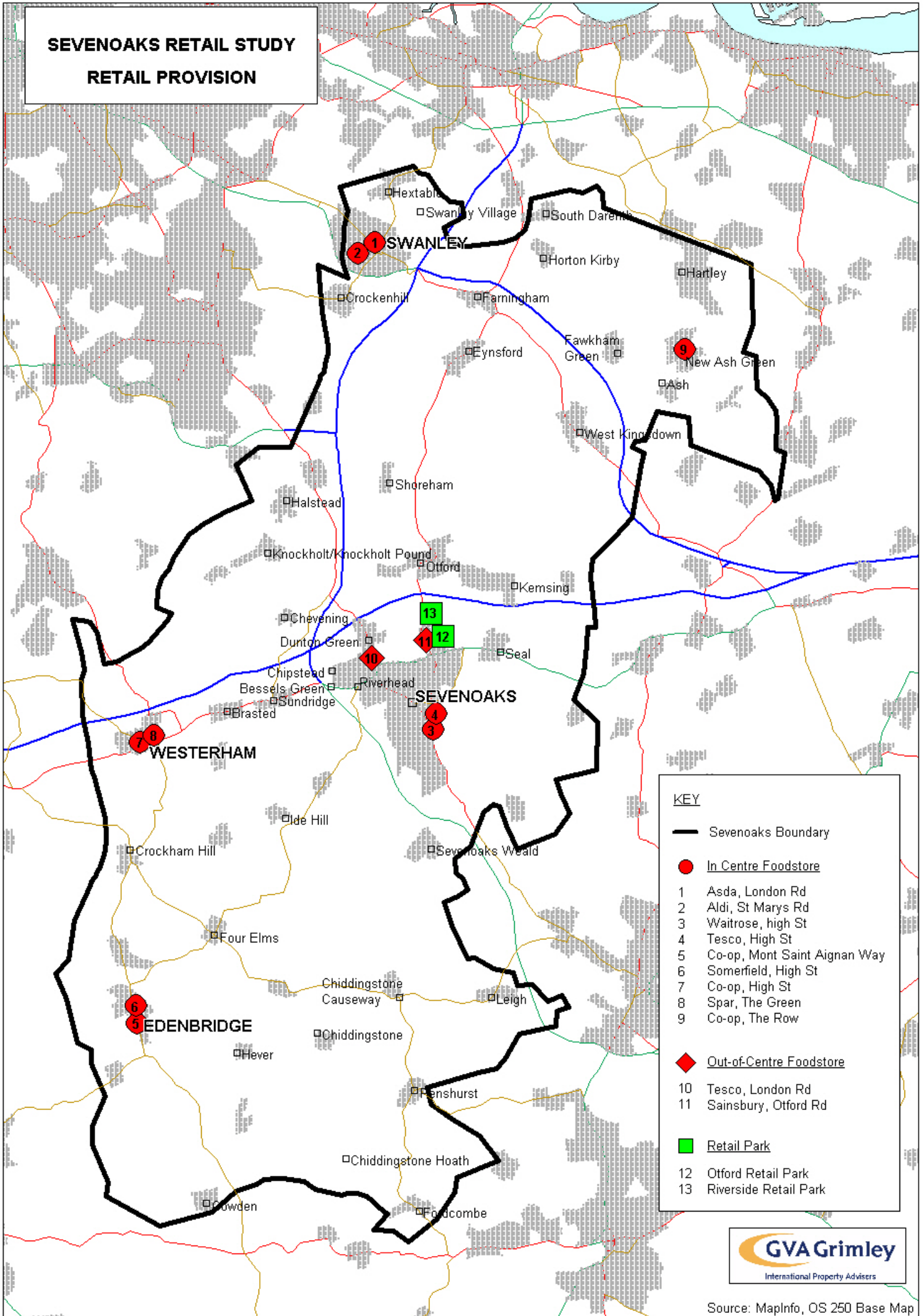
— Study Area Boundary



PLAN 3

EXISTING RETAIL PROVISION: FOODSTORES & RETAIL PARKS

**SEVENOAKS RETAIL STUDY
RETAIL PROVISION**



KEY

- Sevenoaks Boundary
- In Centre Foodstore
 - 1 Asda, London Rd
 - 2 Aldi, St Marys Rd
 - 3 Waitrose, high St
 - 4 Tesco, High St
 - 5 Co-op, Mont Saint Aignan Way
 - 6 Somerfield, High St
 - 7 Co-op, High St
 - 8 Spar, The Green
 - 9 Co-op, The Row
- Out-of-Centre Foodstore
 - 10 Tesco, London Rd
 - 11 Sainsbury, Otford Rd
- Retail Park
 - 12 Otford Retail Park
 - 13 Riverside Retail Park



APPENDIX 1

CONVENIENCE MODELLING

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 1
SURVEY AREA POPULATION FORECASTS

Survey Zone	Postcode Sector Groupings	POPULATION				
		2009	2011	2016	2021	2026
1	TN13 1/2/3 TN14 5	28,967	29,112	29,135	29,542	30,192
2	TN14 7	4,863	4,876	4,825	4,816	4,845
3	TN14 6 TN16 1	7,872	7,913	7,844	7,950	8,058
4	TN15 0/9	5,728	5,784	5,804	5,872	5,962
5	TN15 6	9,103	9,140	9,089	9,169	9,241
6	TN15 7/8	8,485	8,501	8,565	8,668	8,842
7	TN16 2/3	14,466	14,696	15,201	15,706	16,296
8	TN8 5/6/7	11,905	11,977	11,967	12,144	12,343
9	RH8 0/9	15,137	15,304	15,430	15,611	16,025
10	RH7 6 RH19 2/3	25,717	26,017	26,528	27,120	27,895
11	TN11 9 TN9 1/2 TN10 3/4 TN11 8/0	46,013	46,373	47,214	48,190	49,643
12	ME19 4/5/6 ME18 5 TN12 5	26,471	26,812	27,642	28,353	29,338
13	DA13 0 DA3 7/8	26,160	26,612	27,205	27,921	28,194
14	DA4 9/0 BR8 7/8	31,661	32,037	32,312	33,056	33,901
15	DA2 7 DA5 2 DA14 5 DA1 1/2/3 DA2 6	59,787	61,607	64,829	68,097	69,532
16	BR5 3/4 BR6 6/7/9	50,078	50,557	51,664	52,736	54,203
TOTAL		372,413	377,318	385,254	394,951	404,510

SOURCE: Experian Business Solutions

TABLE 1A
POPULATION GROWTH RATES

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
0.5	0.6	2.0	4.2
0.3	-0.8	-1.0	-0.4
0.5	-0.4	1.0	2.4
1.0	1.3	2.5	4.1
0.4	-0.2	0.7	1.5
0.2	0.9	2.2	4.2
1.6	5.1	8.6	12.7
0.6	0.5	2.0	3.7
1.1	1.9	3.1	5.9
1.2	3.2	5.5	8.5
0.8	2.6	4.7	7.9
1.3	4.4	7.1	10.8
1.7	4.0	6.7	7.8
1.2	2.1	4.4	7.1
3.0	8.4	13.9	16.3
1.0	3.2	5.3	8.2
1.3	3.4	6.1	8.6

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

2007		2009		2011		2016		2021		2026		
		Minus SFT at 3.0%		Minus SFT at 3.5%		Minus SFT at 4.0%		Minus SFT at 4.0%		Minus SFT at 4.0%		
ZONE												
1	1,944	1,899	1,952	1,893	1,956	1,887	2,035	1,954	2,128	2,043	2,226	2,137
2	2,016	1,969	2,024	1,963	2,028	1,957	2,110	2,026	2,207	2,119	2,308	2,216
3	1,877	1,833	1,884	1,828	1,888	1,822	1,965	1,886	2,065	1,973	2,149	2,063
4	2,069	2,021	2,077	2,015	2,081	2,009	2,166	2,079	2,265	2,175	2,369	2,274
5	1,844	1,801	1,851	1,796	1,855	1,790	1,930	1,853	2,019	1,938	2,111	2,027
6	1,859	1,816	1,866	1,810	1,870	1,805	1,946	1,868	2,035	1,954	2,129	2,043
7	1,898	1,854	1,906	1,848	1,909	1,843	1,987	1,907	2,078	1,995	2,173	2,086
8	1,813	1,771	1,820	1,766	1,824	1,760	1,898	1,822	1,985	1,906	2,076	1,993
9	1,933	1,888	1,941	1,882	1,945	1,876	2,024	1,943	2,116	2,032	2,213	2,125
10	1,811	1,769	1,818	1,764	1,822	1,758	1,896	1,820	1,983	1,903	2,074	1,991
11	1,740	1,699	1,747	1,694	1,750	1,689	1,822	1,749	1,905	1,829	1,992	1,913
12	1,818	1,776	1,825	1,770	1,829	1,765	1,903	1,827	1,990	1,911	2,082	1,998
13	1,877	1,833	1,884	1,828	1,888	1,822	1,965	1,886	2,065	1,973	2,149	2,063
14	1,719	1,679	1,726	1,674	1,729	1,669	1,800	1,728	1,882	1,807	1,968	1,890
15	1,701	1,661	1,708	1,656	1,711	1,651	1,781	1,709	1,862	1,788	1,948	1,870
16	1,846	1,803	1,853	1,798	1,857	1,792	1,933	1,855	2,021	1,940	2,114	2,029

Source: Experian

TABLE 3
SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

2009		2011		2016		2021		2026	
		£000		£000		£000		£000	
ZONE									
1	54,839	54,939	56,921	60,361	64,515				
2	9,547	9,543	9,776	10,205	10,736				
3	14,389	14,419	14,797	15,684	16,625				
4	11,541	11,617	12,068	12,769	13,559				
5	16,347	16,361	16,844	17,771	18,731				
6	15,361	15,341	16,002	16,936	18,068				
7	26,738	27,078	28,995	31,331	33,998				
8	21,019	21,080	21,804	23,141	24,598				
9	28,494	28,718	29,975	31,716	34,049				
10	45,355	45,739	48,282	51,621	55,529				
11	77,968	78,330	82,562	88,130	94,947				
12	46,865	47,319	50,504	54,176	58,627				
13	47,818	48,491	51,319	55,082	58,169				
14	53,001	53,462	55,821	59,723	64,056				
15	99,037	101,730	110,824	121,745	130,006				
16	90,025	90,600	95,848	102,319	109,984				
TOTAL	658,344	664,767	702,342	752,709	806,196				

Source: Tables 1 & 2

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

CONVENIENCE GOODS - IN-CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	WAITROSE, HIGH STREET					TESCO, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE STORES					TOTAL				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	17	17	17	17	17	8	8	8	8	8	6	6	6	6	6	32	32	32	32	32
2	5	5	5	5	5	2	2	2	2	2	4	4	4	4	4	12	12	12	12	12
3	8	8	8	8	8	6	6	6	6	6	4	4	4	4	4	17	17	17	17	17
4	24	24	24	24	24	8	8	8	8	8	3	3	3	3	3	35	35	35	35	35
5	1	1	1	1	1	3	3	3	3	3	3	3	3	3	3	8	8	8	8	8
6	3	3	3	3	3	2	2	2	2	2	2	2	2	2	2	7	7	7	7	7
7	2	2	2	2	2	2	2	2	2	2	1	1	1	1	1	4	4	4	4	4
8	2	2	2	2	2	1	1	1	1	1	0	0	0	0	0	3	3	3	3	3
9	2	2	2	2	2	2	2	2	2	2	0	0	0	0	0	3	3	3	3	3
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	2	2	2	2	2	1	1	1	1	1	0	0	0	0	0	3	3	3	3	3

SOURCE: Sevenoaks Household Survey, November 2004
Note: "Other" includes the M&S store and smaller convenience provision in the town centre

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	WAITROSE, HIGH STREET					TESCO, HIGH STREET					OTHER TOWN CENTRE CONVENIENCE STORES					TOTAL TOWN CENTRE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	9,569	9,587	9,933	10,533	11,258	4,497	4,505	4,668	4,950	5,290	3,373	3,379	3,501	3,712	3,968	17,439	17,471	18,101	19,195	20,516
2	523	522	535	559	588	193	193	198	207	217	396	396	406	423	446	1,112	1,112	1,139	1,189	1,251
3	1,126	1,128	1,158	1,227	1,301	853	854	877	929	985	525	526	540	572	607	2,504	2,509	2,575	2,729	2,893
4	2,793	2,811	2,921	3,090	3,281	889	895	929	983	1,044	372	375	389	412	437	4,054	4,081	4,239	4,485	4,763
5	229	229	236	249	262	490	491	505	533	562	531	532	547	578	609	1,251	1,252	1,289	1,359	1,433
6	461	460	480	508	542	230	230	240	254	271	342	341	356	377	402	1,033	1,032	1,076	1,139	1,215
7	401	406	435	470	510	401	406	435	470	510	154	156	167	180	195	956	968	1,037	1,120	1,215
8	357	358	371	393	418	205	206	213	226	240	0	0	0	0	0	562	564	583	619	658
9	427	431	450	476	511	427	431	450	476	511	0	0	0	0	0	855	862	899	951	1,021
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,350	1,359	1,438	1,535	1,650	1,103	1,110	1,174	1,253	1,347	0	0	0	0	0	2,453	2,469	2,612	2,788	2,997
TOTALS	17,237	17,293	17,955	19,040	20,321	9,288	9,320	9,688	10,281	10,977	5,693	5,705	5,906	6,254	6,664	32,218	32,317	33,549	35,575	37,962

SOURCE: Tables 2 & 3
Note: "Other" includes the M&S store and smaller convenience provision in the town centre

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

CONVENIENCE GOODS - OUT OF CENTRE

Table 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	J SAINSBURY, OTFORD					TESCO, RIVERHEAD					TOTAL				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	24	24	24	24	24	41	41	41	41	41	65	65	65	65	65
2	25	25	25	25	25	33	33	33	33	33	58	58	58	58	58
3	15	15	15	15	15	34	34	34	34	34	49	49	49	49	49
4	25	25	25	25	25	21	21	21	21	21	46	46	46	46	46
5	24	24	24	24	24	18	18	18	18	18	42	42	42	42	42
6	7	7	7	7	7	10	10	10	10	10	17	17	17	17	17
7	5	5	5	5	5	13	13	13	13	13	18	18	18	18	18
8	4	4	4	4	4	11	11	11	11	11	15	15	15	15	15
9	3	3	3	3	3	4	4	4	4	4	7	7	7	7	7
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	5	5	5	5	5	1	1	1	1	1	6	6	6	6	6
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	4	4	4	4	4	7	7	7	7	7	10	10	10	10	10

SOURCE: Sevenoaks Household Survey, November 2004

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	J SAINSBURY, OTFORD					TESCO, RIVERHEAD					TOTAL OUT OF CENTRE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	13,326	13,350	13,832	14,668	15,677	22,338	22,379	23,186	24,587	26,279	35,663	35,729	37,018	39,255	41,956
2	2,411	2,410	2,468	2,577	2,711	3,132	3,130	3,206	3,347	3,522	5,542	5,540	5,675	5,924	6,232
3	2,148	2,152	2,208	2,341	2,481	4,955	4,965	5,095	5,400	5,725	7,102	7,117	7,303	7,741	8,206
4	2,940	2,959	3,074	3,253	3,454	2,412	2,428	2,522	2,669	2,834	5,352	5,388	5,597	5,922	6,288
5	3,944	3,947	4,064	4,287	4,519	2,893	2,896	2,981	3,145	3,315	6,837	6,843	7,045	7,433	7,834
6	1,141	1,139	1,188	1,258	1,342	1,536	1,534	1,600	1,694	1,807	2,677	2,673	2,788	2,951	3,148
7	1,357	1,374	1,472	1,590	1,725	3,414	3,457	3,702	4,000	4,340	4,771	4,831	5,173	5,590	6,066
8	836	838	867	920	978	2,249	2,256	2,333	2,476	2,632	3,085	3,093	3,200	3,396	3,610
9	855	862	899	951	1,021	1,140	1,149	1,199	1,269	1,362	1,995	2,010	2,098	2,220	2,383
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	1,559	1,567	1,651	1,763	1,899	1,559	1,567	1,651	1,763	1,899
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	2,663	2,686	2,805	3,001	3,219	689	695	726	776	833	3,352	3,381	3,531	3,777	4,052
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	3,241	3,262	3,451	3,683	3,959	6,122	6,161	6,518	6,958	7,479	9,363	9,422	9,968	10,641	11,438
TOTALS	34,860	34,979	36,328	38,529	41,087	52,438	52,615	54,719	58,084	62,026	87,298	87,594	91,047	96,612	103,113

SOURCE: Table 2 & 7

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

CONVENIENCE GOODS - DISTRICT CENTRES

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	SWANLEY					WESTERHAM					EDENBRIDGE				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	3	3	3	3	3	0	0	0	0	0	0	0	0	0	0
3	1	1	1	1	1	14	14	14	14	14	2	2	2	2	2
4	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0
5	25	25	25	25	25	0	0	0	0	0	0	0	0	0	0
6	6	6	6	6	6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	2	2	2	2	2	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0	48	48	48	48	48
9	0	0	0	0	0	0	0	0	0	0	6	6	6	6	6
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
12	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0
13	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0
14	61	61	61	61	61	0	0	0	0	0	0	0	0	0	0
15	12	12	12	12	12	0	0	0	0	0	0	0	0	0	0
16	10	10	10	10	10	0	0	0	0	0	0	0	0	0	0

SOURCE: Sevenoaks Household Survey, November 2004

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	SWANLEY					WESTERHAM					EDENBRIDGE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0	0	0	192	192	199	211	226
2	294	293	301	314	330	45	45	46	48	51	0	0	0	0	0
3	140	141	144	153	162	1,964	1,968	2,020	2,141	2,269	345	346	355	376	399
4	113	113	118	124	132	0	0	0	0	0	0	0	0	0	0
5	4,115	4,119	4,240	4,474	4,715	0	0	0	0	0	69	70	72	76	80
6	922	920	960	1,016	1,084	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	461	467	500	540	586	0	0	0	0	0
8	268	269	278	295	314	0	0	0	0	0	10,136	10,166	10,515	11,160	11,862
9	0	0	0	0	0	0	0	0	0	0	1,660	1,673	1,746	1,847	1,983
10	295	297	314	336	361	0	0	0	0	0	295	297	314	336	361
11	0	0	0	0	0	0	0	0	0	0	448	450	475	507	546
12	269	272	290	312	337	0	0	0	0	0	0	0	0	0	0
13	717	727	770	826	873	0	0	0	0	0	0	0	0	0	0
14	32,132	32,411	33,842	36,207	38,834	0	0	0	0	0	0	0	0	0	0
15	12,206	12,538	13,659	15,005	16,023	0	0	0	0	0	0	0	0	0	0
16	8,642	8,698	9,201	9,823	10,558	0	0	0	0	0	0	0	0	0	0
TOTALS	60,114	60,799	64,117	68,884	73,724	2,471	2,481	2,566	2,730	2,907	13,146	13,194	13,676	14,513	15,457

SOURCE: Table 2 & 5

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 10

SEVENOAKS TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
Tesco, High Street	1,808	90%	1,627	12,894	20,981
Waitrose, High Street	1,235	90%	1,112	11,601	12,895
Marks and Spencer	294	100%	294	11,800	3,469
Other	155	100%	155	3,000	466
TOTAL	3,492		3,188	11,860	37,811

TABLE 11

SEVENOAKS OUT OF CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
J Sainsbury, Otford	4,412	3,750	9,744	36,540
Tesco, Riverhead	3,043	2,739	12,894	35,317
TOTAL	7,455	6,489	11,074	71,857

TABLE 12

TOTAL CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	10,947	9,677	11,333	109,667

TABLE 13

DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
Asda, Swanley	5,344	70%	3,741	14,352	53,688
Other stores, Swanley	1,625	100%	1,625	3,000	4,874
TOTAL SWANLEY	6,969		5,365	10,915	58,562
TOTAL WESTERHAM	630	100%	630	3,000	1,890
Co-op, Edenbridge	1,115	95%	1,059	6,722	7,120
Other stores, Edenbridge	702	100%	702	3,000	2,106
TOTAL EDENBRIDGE	1,817		1,761	5,238	9,226

Note: Other stores Swanley includes Aldi

SEVENOAKS DISTRICT COUNCIL
 RETAIL STUDY UPDATE 2009

TABLE 14
SEVENOAKS RETAIL COMMITMENTS - CONVENIENCE GOODS

Commitment	Net Floorspace (sqm)	Net Convenience (sqm)	Company Average Sales (£ per sq m net)	Average Turnover 2009 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Tesco, Riverhead Extension	1,118	227	12,894	2,927	2,927	2,956	3,031	3,108

Source: Sevenoaks District Council

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 15
FUTURE SHOP FLOORSPACE CAPACITY IN SEVENOAKS

	CONVENIENCE GOODS				
	2009	2011	2016	2021	2026
Residents Spending (£000)	119,516	119,912	124,596	132,187	141,075
Existing Shop Floorspace (sq m net)	9,677	9,677	9,677	9,677	9,677
Sales per sq m net £	12,351	11,333	11,447	11,736	12,032
Sales from Existing Floorspace (£000)	119,516	109,667	110,768	113,566	116,433
Sales from Committed Floorspace (£000)	0	2,927	2,956	3,031	3,108
Residual Spending to Support new shops (£000)	0	7,317	10,871	15,591	21,534
Sales per sq m net in new shops (£) Based on large store format (see note 1)	12,041	12,041	12,162	12,469	12,784
Capacity for new floorspace (sq m net)	0	608	894	1,250	1,684

Note 1 - Average Sales Density from largest foodstore formats - Tesco, Sainsbury, Asda & Morrosos = £12,041 per sqm net

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 16
FUTURE SHOP FLOORSPACE CAPACITY IN EDENBRIDGE

	CONVENIENCE GOODS				
	2009	2011	2016	2021	2026
Residents Spending (£000)	13,146	13,194	13,676	14,513	15,457
Existing Shop Floorspace (sq m net)	1,761	1,761	1,761	1,761	1,761
Sales per sq m net £	7,464	5,238	5,291	5,425	5,562
Sales from Existing Floorspace (£000)	13,146	9,226	9,319	9,554	9,795
Sales from Proposed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	3,968	4,357	4,958	5,661
Sales per sq m net in new shops (£) Based on large store format (see note 1)	12,041	12,041	12,162	12,469	12,784
Capacity for new floorspace (sq m net)	0	330	358	398	443

Note 1 - Average Sales Density from largest foodstore formats - Tesco, Sainsbury, Asda & Morrosons = £12,041 per sqm net

CAPACITY PROJECTIONS: CONVENIENCE GOODS

**TABLE 17
FUTURE SHOP FLOORSPACE CAPACITY IN SWANLEY**

	CONVENIENCE GOODS				
	2009	2011	2016	2021	2026
Residents Spending (£000)	60,114	60,799	64,117	68,884	73,724
Existing Shop Floorspace (sq m net)	5,365	5,365	5,365	5,365	5,365
Sales per sq m net £	11,204	10,915	11,024	11,303	11,588
Sales from Existing Floorspace (£000)	60,114	58,562	59,150	60,643	62,175
Sales from Proposed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	2,237	4,967	8,241	11,549
Sales per sq m net in new shops (£) Based on large store format (see note 1)	12,041	12,041	12,162	12,469	12,784
Capacity for new floorspace (sq m net)	0	186	408	661	903

Note 1 - Average Sales Density from largest foodstore formats - Tesco, Sainsbury, Asda & Morrosons = £12,041 per sqm net

APPENDIX 2

COMPARISON MODELLING

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 1
SURVEY AREA POPULATION FORECASTS

Survey Zone	Postcode Sector Groupings	POPULATION				
		2009	2011	2016	2021	2026
1	TN13 1/2/3 TN14 5	28,967	29,112	29,135	29,542	30,192
2	TN14 7	4,863	4,876	4,825	4,816	4,845
3	TN14 6 TN16 1	7,872	7,913	7,844	7,950	8,058
4	TN15 0/9	5,728	5,784	5,804	5,872	5,962
5	TN15 6	9,103	9,140	9,089	9,169	9,241
6	TN15 7/8	8,485	8,501	8,565	8,668	8,842
7	TN16 2/3	14,466	14,696	15,201	15,706	16,296
8	TN8 5/6/7	11,905	11,977	11,967	12,144	12,343
9	RH8 0/9	15,137	15,304	15,430	15,611	16,025
10	RH7 6 RH19 2/3	25,717	26,017	26,528	27,120	27,895
11	TN11 9 TN9 1/2 TN10 3/4 TN11 8/0	46,013	46,373	47,214	48,190	49,643
12	ME19 4/5/6 ME18 5 TN12 5	26,471	26,812	27,642	28,353	29,338
13	DA13 0 DA3 7/8	26,160	26,612	27,205	27,921	28,194
14	DA4 9/0 BR8 7/8	31,661	32,037	32,312	33,056	33,901
15	DA2 7 DA5 2 DA14 5 DA1 1/2/3 DA2 6	59,787	61,607	64,829	68,097	69,532
16	BR5 3/4 BR6 6/7/9	50,078	50,557	51,664	52,736	54,203
TOTAL		372,413	377,318	385,254	394,951	404,510

SOURCE: Experian Business Solutions

TABLE 1A
POPULATION GROWTH RATES

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
0.5	0.6	2.0	4.2
0.3	-0.8	-1.0	-0.4
0.5	-0.4	1.0	2.4
1.0	1.3	2.5	4.1
0.4	-0.2	0.7	1.5
0.2	0.9	2.2	4.2
1.6	5.1	8.6	12.7
0.6	0.5	2.0	3.7
1.1	1.9	3.1	5.9
1.2	3.2	5.5	8.5
0.8	2.6	4.7	7.9
1.3	4.4	7.1	10.8
1.7	4.0	6.7	7.8
1.2	2.1	4.4	7.1
3.0	8.4	13.9	16.3
1.0	3.2	5.3	8.2
1.3	3.4	6.1	8.6

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2005 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE												
2007 3.7% pa												
2008-2011 -0.9% pa												
2011-2016 2.5% pa												
2016 Onwards 2.8% pa												
ZONE	2007		2009		2011		2016		2021		2026	
	Minus SFT at 8.0%		Minus SFT at 10.0%		Minus SFT at 11.3%		Minus SFT at 12.5%		Minus SFT at 12.5%		Minus SFT at 12.5%	
1	3,611	3,322	3,643	3,278	3,655	3,243	4,135	3,618	4,748	4,154	5,450	4,769
2	3,833	3,526	3,867	3,480	3,880	3,443	4,389	3,841	5,039	4,409	5,786	5,062
3	3,556	3,272	3,587	3,229	3,599	3,194	4,072	3,563	4,675	4,091	5,367	4,697
4	3,866	3,557	3,900	3,510	3,913	3,472	4,427	3,874	5,083	4,447	5,835	5,106
5	3,486	3,207	3,517	3,165	3,528	3,131	3,992	3,493	4,583	4,010	5,262	4,604
6	3,444	3,168	3,474	3,127	3,486	3,093	3,944	3,451	4,528	3,962	5,198	4,549
7	3,388	3,117	3,418	3,076	3,429	3,043	3,880	3,395	4,454	3,898	5,114	4,475
8	3,307	3,042	3,336	3,002	3,347	2,970	3,787	3,314	4,348	3,804	4,992	4,368
9	3,585	3,298	3,617	3,255	3,629	3,220	4,105	3,592	4,713	4,124	5,411	4,735
10	3,384	3,113	3,414	3,072	3,425	3,040	3,875	3,391	4,449	3,893	5,108	4,469
11	3,154	2,902	3,182	2,864	3,192	2,833	3,612	3,160	4,147	3,628	4,761	4,166
12	3,382	3,111	3,412	3,071	3,423	3,038	3,873	3,389	4,446	3,891	5,105	4,467
13	3,556	3,272	3,587	3,229	3,599	3,194	4,072	3,563	4,675	4,091	5,367	4,697
14	3,045	2,801	3,072	2,765	3,082	2,735	3,487	3,051	4,003	3,503	4,596	4,022
15	3,017	2,776	3,044	2,739	3,054	2,710	3,455	3,023	3,967	3,471	4,554	3,985
16	3,095	2,847	3,122	2,810	3,133	2,780	3,544	3,101	4,069	3,560	4,672	4,088

Source: Experian

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

GROWTH IN PER CAPITA RETAIL EXPENDITURE:					
Comparison Goods					
2007 3.7% pa					
2008-2011 -0.9% pa					
2011-2016 2.5% pa					
2016 Onwards 2.8% pa					
ZONE	2009	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	94,968	94,422	105,420	122,720	143,990
2	16,924	16,787	18,532	21,236	24,527
3	25,415	25,274	27,950	32,522	37,844
4	20,105	20,085	22,484	26,115	30,442
5	28,811	28,619	31,749	36,770	42,546
6	26,532	26,297	29,558	34,342	40,219
7	44,498	44,721	51,606	61,215	72,918
8	35,745	35,576	39,655	46,200	53,910
9	49,269	49,280	55,429	64,382	75,675
10	79,013	79,079	89,953	105,577	124,672
11	131,762	131,371	149,216	174,850	206,791
12	81,281	81,447	93,675	110,311	131,044
13	84,459	84,999	96,938	114,219	132,413
14	87,531	87,622	98,590	115,794	136,337
15	163,768	166,947	195,987	236,347	277,059
16	140,720	140,545	160,225	187,765	221,563
TOTAL	1,110,801	1,113,071	1,266,965	1,490,366	1,752,151

Source: Tables 1 & 2

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

COMPARISON GOODS - SEVENOAKS TOWN CENTRE

TABLE 4
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	SEVENOAKS TOWN CENTRE				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	33	33	33	33	33
2	16	16	16	16	16
3	22	22	22	22	22
4	27	27	27	27	27
5	15	15	15	15	15
6	7	7	7	7	7
7	7	7	7	7	7
8	1	1	1	1	1
9	0	0	0	0	0
10	0	0	0	0	0
11	1	1	1	1	1
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	2	2	2	2	2

SOURCE: Sevenoaks Household Survey, November 2004

TABLE 5
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	SEVENOAKS TOWN CENTRE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	31,136	30,957	34,563	40,235	47,209
2	2,655	2,634	2,907	3,332	3,848
3	5,520	5,489	6,070	7,063	8,219
4	5,496	5,490	6,146	7,139	8,322
5	4,332	4,303	4,773	5,528	6,397
6	1,810	1,794	2,016	2,343	2,744
7	3,163	3,179	3,669	4,352	5,184
8	444	442	493	574	670
9	0	0	0	0	0
10	0	0	0	0	0
11	927	924	1,050	1,230	1,455
12	0	0	0	0	0
13	403	405	462	544	631
14	397	398	448	526	619
15	0	0	0	0	0
16	2,465	2,462	2,807	3,289	3,882
Total	58,749	58,478	65,405	76,155	89,178

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

COMPARISON GOODS - OUT OF CENTRE

TABLE 6

COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	SEVENOAKS OUT OF CENTRE				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	18	18	18	18	18
2	9	9	9	9	9
3	13	13	13	13	13
4	17	17	17	17	17
5	13	13	13	13	13
6	2	2	2	2	2
7	7	7	7	7	7
8	2	2	2	2	2
9	2	2	2	2	2
10	0	0	0	0	0
11	0	0	0	0	0
12	1	1	1	1	1
13	1	1	1	1	1
14	3	3	3	3	3
15	1	1	1	1	1
16	1	1	1	1	1

SOURCE: Sevenoaks Household Survey, November 2004

TABLE 7

COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	SEVENOAKS OUT OF CENTRE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	17,545	17,444	19,476	22,672	26,602
2	1,517	1,505	1,661	1,904	2,199
3	3,208	3,191	3,528	4,106	4,778
4	3,333	3,330	3,728	4,330	5,047
5	3,617	3,593	3,986	4,616	5,341
6	527	522	587	682	798
7	3,131	3,146	3,631	4,307	5,130
8	840	836	932	1,086	1,267
9	1,002	1,002	1,127	1,309	1,543
10	249	249	283	332	392
11	0	0	0	0	0
12	448	448	516	607	722
13	1,240	1,248	1,423	1,677	1,944
14	2,707	2,710	3,049	3,582	4,217
15	1,589	1,620	1,901	2,293	2,688
16	1,770	1,768	2,016	2,362	2,788
TOTALS	42,723	42,612	47,844	55,864	65,455

SOURCE: Tables 2 & 5

SEVENOAKS DISTRICT COUNCIL

RETAIL STUDY UPDATE 2009

TABLE 8
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	SWANLEY TOWN CENTRE				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	2	2	2	2	2
6	1	1	1	1	1
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	1	1	1	1	1
13	0	0	0	0	0
14	3	3	3	3	3
15	0	0	0	0	0
16	1	1	1	1	1

SOURCE: Sevenoaks Household Survey, November 2004

TABLE 9
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	SWANLEY TOWN CENTRE				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	334	332	371	432	507
2	60	60	66	76	88
3	0	0	0	0	0
4	0	0	0	0	0
5	565	561	623	721	834
6	139	138	155	180	211
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	426	427	491	578	687
13	0	0	0	0	0
14	2,971	2,974	3,346	3,930	4,628
15	0	0	0	0	0
16	704	703	802	940	1,109
Total	5,200	5,196	5,854	6,857	8,063

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 10
SEVENOAKS TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2009 £000s
Sevenoaks Town Centre	8,974	5,500	49,356
TOTAL	8,974	5,500	49,356

Source: Experian Goad, Sevenoaks May 2008

TABLE 11
RETAIL WAREHOUSE FLOORSPACE

	Net Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s) 2009
Oxford Road Retail Park			
Wickes	2,300	2,403	5,527
Currys	750	7,234	5,426
Carpentryright	500	1,341	671
SUB TOTAL	3,550	3,274	11,623
Riverside Retail Park			
Pets at Home	127	2,494	317
Halfords	190	2,452	466
Homebase	2,960	1,429	4,230
SUB TOTAL	3,277	1,530	5,012
TOTAL	6,827	2,437	16,635

TABLE 11 A
OUT OF CENTRE COMPARISON FLOORSPACE IN SUPERMARKETS

	Net Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s) 2009
Tesco Riverhead	304	5,000	1,520
Sainsbury's, Oxford Road	662	5,000	3,310
TOTAL	966	5,000	4,830

TABLE 12
SWANLEY TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2009 £000's
Swanley Town Centre	4,443	2,500	11,108
TOTAL	4,443		11,108

Source: Experian Goad, Sevenoaks March 2004

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 13
SEVENOAKS RETAIL COMMITMENTS - COMPARISON GOODS

Commitment/Proposal	Net Flsp (sqm)	Net Comparison (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2009 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Tesco, Riverhead Extension	1,118	891	5,000	4,455	4,500	4,729	5,221	5,765
TOTAL	1,118		3,985	4,455	4,500	4,729	5,221	5,765

Source: Sevenoaks District Council

SEVENOAKS DISTRICT COUNCIL
RETAIL STUDY UPDATE 2009

TABLE 14
FUTURE SHOP FLOORSPACE CAPACITY IN SEVENOAKS

GROWTH IN SALES PER SQ M	COMPARISON GOODS				
	SALES DENSITY INCREASE		2009-2011	2011-2016	2016-2026
			0.5% pa	1% pa	2% pa
	COMPARISON GOODS				
	2009	2011	2016	2021	2026
Total Available Expenditure (£000)	1,110,801	1,113,071	1,266,965	1,490,366	1,752,151
Market Share from Survey Area	9	9	9	9	9
Survey Area Residents Spending (£000)	101,472	101,090	113,249	132,019	154,633
Existing Shop Floorspace (sq m net)	16,767	16,767	16,767	16,767	16,767
Sales per sq m net £	6,052	6,113	6,488	7,163	7,909
Sales from Existing Floorspace (£000)	101,472	102,489	108,783	120,105	132,606
Sales from Committed Floorspace (£000)	0	4,500	4,729	5,221	5,765
Residual Spending to Support new shops (£000)	0	-5,898	-263	6,693	16,262
Sales per sq m net in new shops (£)	5500	5555	5839	6446	7117
Capacity for new floorspace (sq m net)	0	-1,062	-45	1,038	2,285

