

Appendix D: Statistical Capacity Assessment

Table 27: Study Area expenditure by destination (£m)

Destination	Expenditure by Category (£m)												Total Expenditure (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Royal Tunbridge Wells	163.8	37.9	201.7	200.2	45.4	179.6	124.8	54.6	127.8	54.7	72.5	859.6	1,061.3
Southborough	2.9	5.3	8.2	0.3	0.0	0.4	0.0	0.1	0.0	0.0	0.5	1.3	9.5
Paddock Wood	25.4	9.2	34.7	2.1	0.6	1.6	3.2	0.5	0.4	1.7	2.4	12.5	47.2
Cranbrook	9.7	7.2	16.9	1.0	0.0	1.3	1.4	0.4	3.2	1.2	1.6	10.1	27.0
Hawkhurst	14.0	5.0	19.0	0.0	0.3	0.0	0.0	0.0	1.3	0.2	0.2	2.0	21.0
Others in Tunbridge Wells Borough	4.6	15.9	20.5	0.3	0.8	1.6	0.3	0.5	0.4	3.2	2.2	9.2	29.8
Tunbridge Wells Sub-Total	220.4	80.5	301.0	203.9	47.1	184.5	129.7	56.1	133.1	61.0	79.4	894.8	1195.7
Others in Study Area	393.6	158.8	552.4	59.6	52.4	61.9	75.0	19.4	46.5	51.8	45.2	411.7	964.1
Outside the Study Area	223.1	39.7	262.9	197.7	38.6	165.1	108.6	51.2	96.6	42.7	54.5	754.9	1,017.8
Total	837.2	279.1	1,116.2	461.2	138.1	411.5	313.2	126.7	276.1	155.5	179.1	2,061.5	3,177.7

1. Convenience spending sourced from Table 4
2. Comparison spending sourced from Tables 10-24

2018 Prices

Table 28: Study Area market share by destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Royal Tunbridge Wells	19.6	13.6	18.1	43.4	32.9	43.6	39.8	43.1	46.3	35.2	40.5	41.7	33.4
Southborough	0.3	1.9	0.7	0.1	0.0	0.1	0.0	0.1	0.0	0.0	0.3	0.1	0.3
Paddock Wood	3.0	3.3	3.1	0.5	0.4	0.4	1.0	0.4	0.2	1.1	1.3	0.6	1.5
Cranbrook	1.2	2.6	1.5	0.2	0.0	0.3	0.4	0.3	1.1	0.8	0.9	0.5	0.8
Hawkhurst	1.7	1.8	1.7	0.0	0.2	0.0	0.0	0.0	0.5	0.2	0.1	0.1	0.7
Others in Tunbridge Wells Borough	0.6	5.7	1.8	0.1	0.6	0.4	0.1	0.4	0.2	2.0	1.2	0.4	0.9
Tunbridge Wells Sub-Total	26.3	28.9	27.0	44.2	34.1	44.8	41.4	44.3	48.2	39.2	44.3	43.4	37.6
Others in Study Area	47.0	56.9	49.5	12.9	37.9	15.0	23.9	15.3	16.8	33.3	25.2	20.0	30.3
Outside the Study Area	26.7	14.2	23.6	42.9	27.9	40.1	34.7	40.4	35.0	27.4	30.4	36.6	32.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 29: Expenditure leakage from Study Area by destination (£m)

Destination	Expenditure by Category (£m)												Total Expenditure (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
East Grinstead	88.0	25.3	113.3	15.2	15.7	18.5	19.0	5.8	4.2	11.0	12.1	101.6	214.9
Maidstone	47.8	11.1	58.9	50.3	11.8	29.6	19.7	9.1	9.6	6.5	10.4	147.0	205.9
Tonbridge	97.1	29.1	126.2	9.8	10.7	11.9	15.4	3.6	2.3	4.3	5.1	63.1	189.4
Ashford	20.6	1.2	21.7	16.8	2.5	17.6	11.4	5.7	9.3	9.1	7.4	79.8	101.5
Tenterden	39.4	15.2	54.6	12.6	5.4	3.8	6.4	1.2	5.0	2.6	1.1	38.2	92.8
Bluewater	0.0	0.0	0.0	37.3	4.2	27.6	7.4	8.2	13.5	0.0	5.7	103.8	103.8
Crawley	5.7	2.3	8.1	21.3	1.0	11.7	9.3	3.7	20.2	1.3	1.5	70.1	78.2
Sevenoaks	38.5	8.4	47.0	0.5	0.8	1.8	1.0	0.5	2.9	3.9	0.9	12.3	59.3
Others outside Tunbridge Wells	279.6	105.9	385.4	93.5	38.8	104.4	93.9	32.8	76.0	55.7	55.6	550.8	936.2
Total Leakage from the Study Area	616.7	198.5	815.3	257.3	90.9	227.0	183.6	70.6	143.0	94.5	99.7	1,166.7	1,981.9

1. Convenience spending sourced from Table 4
2. Comparison spending sourced from Tables 10-24

2018 Prices

Table 30: Market share leakage from Study Area by destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
East Grinstead	10.5	9.1	10.2	3.3	11.4	4.5	6.1	4.6	1.5	7.1	6.7	4.9	6.8
Maidstone	5.7	4.0	5.3	10.9	8.5	7.2	6.3	7.2	3.5	4.2	5.8	7.1	6.5
Tonbridge	11.6	10.4	11.3	2.1	7.8	2.9	4.9	2.8	0.8	2.8	2.8	3.1	6.0
Ashford	2.5	0.4	1.9	3.6	1.8	4.3	3.6	4.5	3.4	5.9	4.1	3.9	3.2
Tenterden	4.7	5.4	4.9	2.7	3.9	0.9	2.0	1.0	1.8	1.7	0.6	1.9	2.9
Bluewater	0.0	0.0	0.0	8.1	3.1	6.7	2.3	6.5	4.9	0.0	3.2	5.0	3.3
Crawley	0.7	0.8	0.7	4.6	0.7	2.8	3.0	2.9	7.3	0.8	0.8	3.4	2.5
Sevenoaks	4.6	3.0	4.2	0.1	0.6	0.4	0.3	0.4	1.0	2.5	0.5	0.6	1.9
Others outside Tunbridge Wells	33.4	37.9	34.5	20.3	28.1	25.4	30.0	25.8	27.5	35.8	31.0	26.7	29.5
Total Leakage from the Study Area	73.7	71.1	73.0	55.8	65.9	55.2	58.6	55.7	51.8	60.8	55.7	56.6	62.4

Table 31: Estimated 'capacity' for new retail facilities in Tudeley Village (AL/CA 1)

	Number of New Households Proposed	Household Size (2036)	Population (2036)	Expenditure per Capita at Zone 10 (2036) (£)	Additional Expenditure (2036) (£m)	Retention rate (%)	Residual Expenditure (2036) (£m)	Net Floorspace Capacity (sq m net)	
								Min ¹	Max ²
Convenience	2,800	2.5	7,000	2,451	17.2	80	13.7	1,100	1,900
Comparison	2,800	2.5	7,000	4,599	32.2	20	6.4	700	1,000

1. Average convenience sales density assumed to be £12,950 per sq m, based on the average sales density of supermarket foodstore operators
Average comparison sales density assumed to be £5,500 per sq m which Nexus Planning considers to be towards the higher end of what could be achieved in Tunbridge Wells Borough
2. Average convenience sales density assumed to be £7,393 per sq m, based on the average sales density of Aldi, Lidl and other discount retail operators
Average comparison sales density assumed to be £3,500 per sq m which Nexus Planning considers to be towards the lower end of what could be achieved in Tunbridge Wells Borough
3. The number of households proposed sourced from Tunbridge Wells Borough Council officers
4. Expenditure per capita figures sourced from Table 1 (convenience) and Table 7b (comparison)
5. Retention rate based on Nexus Planning assumptions

2018 Prices

Table 32: Estimated 'capacity' for new retail facilities in Land at Capel and Paddock Wood (AL/CA 3)

	Number of New Households Proposed	Household Size (2036)	Population (2036)	Expenditure per Capita at Zone 10 (2036) (£)	Additional Expenditure (2036) (£m)	Retention rate (%)	Residual Expenditure (2036) (£m)	Net Floorspace Capacity (sq m net)	
								Min ¹	Max ²
Convenience	3,590	2.5	8,975	2,451	22.0	80	17.6	1,400	2,400
Comparison	3,590	2.5	8,975	4,599	41.3	20	8.3	800	1,300

1. Average convenience sales density assumed to be £12,950 per sq m, based on the average sales density of supermarket foodstore operators
Average comparison sales density assumed to be £5,500 per sq m which Nexus Planning considers to be towards the higher end of what could be achieved in Tunbridge Wells Borough
2. Average convenience sales density assumed to be £7,393 per sq m, based on the average sales density of Aldi, Lidl and other discount retail operators
Average comparison sales density assumed to be £3,500 per sq m which Nexus Planning considers to be towards the lower end of what could be achieved in Tunbridge Wells Borough
3. The number of households proposed sourced from Tunbridge Wells Borough Council officers
4. Expenditure per capita figures sourced from Table 1 (convenience) and Table 7b (comparison)
5. Retention rate based on Nexus Planning assumptions

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