

Tunbridge Wells Retail, Commercial Leisure & Town Centre Uses Study Update

on behalf of Tunbridge Wells Borough Council

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Contact

Holmes House
4 Pear Place
London
SE1 9HA

T: 020 7261 4240

E: info@nexusplanning.co.uk

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1.0 Introduction

Instruction

- 1.1 Nexus Planning (Nexus), alongside AspinallVerdi, NEMS Market Research (NEMS), and Durlings have been commissioned by Tunbridge Wells Borough Council in July 2020 to produce a Retail, Commercial Leisure & Town Centre Uses Study for the Borough. The Council are currently preparing the Local Plan for the plan period up to 2038. As such, this 2020 Study will form part of the evidence base upon which the emerging Local Plan will be based.
- 1.2 The approach adopted by Nexus and the project team has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (February 2019), Planning Practise Guidance (PPG), and the Use Classes Order (2020 amendments).
- 1.3 Accordingly, a fundamental objective of the Study is to produce a NPPF and NPPG compliant Study, which provides the Council with an up-to-date objective assessment of town centre needs and provision, the health of Royal Tunbridge Well Primary Regional Town Centre, Cranbrook, Paddock Wood and Southborough Town Centres, and Hawkhurst Rural Service Centre, and a consideration of possible strategic policy responses to any prevalent or emerging issues in those centres.
- 1.4 This Study was undertaken and drafted during a period of 'lockdowns' and social distancing measures necessitated by the Covid-19 pandemic. References to temporary closures of various retail and commercial leisure facilities may have changed following publication, as Government legislation responds to the constantly evolving picture presented by the pandemic.

Scope of Works

- 1.5 In accordance with the Brief, we have conducted this Study in two parts, as follows:
 - Stage 1.** Update to the numerical retail capacity assessment, taking account of population, expenditure and trading changes since 2016;
 - Review of the current office market;
 - Commentary on the potential capacity for new town centre developments, as well as a review of relevant Town Centre allocations;

Commentary on appropriate retail and leisure provision for a planned new settlement (Tudeley Village) and urban expansion (Paddock Wood);

Consideration of the Town Centres' long term recovery from the first lockdown in 2019, and any subsequent lockdown's adapting to social distancing, reductions in spending and other impacts associated with post-Covid-19 trading.

Stage 2. Summarise changing market trends how those will impact on the Borough;

Updated health-checks of Royal Tunbridge Wells Primary Regional Town Centre and SWOT analysis as well as assessment of the Borough's key Town and Rural Service Centres;

Analysis of future demand for office floorspace;

Assessment of the potential for development of key sites and allocations, and recommendations on viable and deliverable opportunities;

Community engagement, through targeted meetings with key stakeholders as well as interview with local business owners and retailers and online survey-based local consultation;

Recommendations and conclusions on appropriate town centre planning policy for the new Local Plan.

- 1.6 The project team has reported the initial findings throughout the Study process, and we go on to set out the assessment and key findings as a consolidated report.

2.0 National and Local Policy Context

- 2.1 Prior to discussing the vitality and viability of the centres within Tunbridge Wells Borough, it is important to set out the prevailing national planning policy context for retail in the UK, as well as the Tunbridge Wells Development Plan.
- 2.2 The following chapter of this assessment sets out the recent updates to the planning policy context, including updates to the National Planning Policy Framework (2019), hereafter, referred to as the NPPF; the National Planning Practice Guidance (NPPG), as well as the recent changes to the Town and Country Planning (Use Classes) Order and Town and Country Planning (General Permitted Development Order).

National Planning Policy Framework

- 2.3 The National Planning Policy Framework was initially adopted on 27 March 2012, and the Government published the updated National Planning Policy Framework ('NPPF') on 24 July 2018, which was further revised on 19 February 2019.
- 2.4 The NPPF remains pro-growth with a "presumption in favour of sustainable development". It effectively instructs decision makers to support development unless there are clear negative environmental, social and/or economic impacts. The NPPF provides the national guidance against which all planning applications should be considered.
- 2.5 At paragraph 8, the NPPF asserts that the planning system must help build a strong, responsive and competitive economy. This overarching economic objective is supported by Chapter 6, which emphasises that significant weight must be given to supporting economic growth and productivity, and that local business needs and wider opportunities for development must be taken into account.
- 2.6 Chapter 7 of the NPPF seeks to ensure the ongoing vitality of town centres. In particular, within this chapter, Paragraphs 85 to 90 promote and support new development and investment within the defined boundaries of town centres, recognising that town centres are the heart of communities. Where town centres are in decline, the NPPF directs local planning authorities to plan positively for their future to encourage economic activity. The NPPF recognises the need for local authorities to

promote the vitality and viability of their towns and cities through the promotion of competition and growth management.

- 2.7 Specifically, Paragraph 86 requires local planning authorities (LPAs) to enforce a sequential approach when assessing planning applications for main town centre uses located outside of existing centres or not in accordance with an up to date Local Plan. To do this, local authorities should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out-of-centre sites be considered. When reviewing edge of centre and out-of-centre proposals, they should give preference to accessible locations well connected to the town centre.
- 2.8 Paragraph 89 specifies that LPAs should require an impact assessment for retail and leisure development outside of town centres that are not in accordance with an up to date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq m. The impact assessment should assess:
- i) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal, and
 - ii) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.
- 2.9 In summary, the NPPF endorses a 'town centre first' approach to all retail activity (including leisure). It stipulates that where retail and leisure proposals cannot be accommodated within, or, adjacent to the town centre, applicants have to demonstrate, through the dual application of the impact test and the sequential test, that the development will not affect negatively upon the vitality and viability of town centres.

National Planning Policy Guidance

- 2.10 The NPPG for 'Town Centres and Retail' (last updated 22 July 2019) sets out further practical details of the Government's aspirations on town centres. Some key headlines are:

- Encourages a wide range of complementary uses in town centres, such as residential, employment, entertainment/leisure, healthcare and education uses, as well as temporary activities such as 'pop ups'.
- Recognises the potential for evening and night-time activities to increase economic activity, employment, diversification and to develop the 'unique brand' of a town centre.
- Promotes stakeholder engagement and involvement in shaping town centres, including the activities of Business Improvement Districts (BIDs), Local Economic Partnerships (LEPs), landowners and private sector businesses.
- Recommends Town Centre Strategies which are realistic based on the likely role and function of the centre, and which identify an appropriate mix of uses, the likely scale of need, and opportunities for improvement, including to the historic and natural environment.

2.11 In July 2019, additional indicators were added to the NPPG's list for planning for town centres and high streets, including balance between independent and multiple stores, barriers to new businesses opening and existing businesses expanding, and opening hours and extent to which there is an evening and night time economy offer.

The Town and Country Planning (Use Classes) & (General Permitted Development) Orders

- 2.12 In recent years, the Government has focussed considerable effort on trying to promote town centres through Permitted Development Rights. In addition to traditional 'rights' to switch between Use Classes within Use Class A class in accordance with the General Permitted Development Order 2015, more recent rights have been granted in order to help diversify town centres and in order to reflect changing economic pressures. These include, subject to Prior Approval, the ability to convert a large number of uses to residential. Uses can include shops, financial and professional services, amusement arcades and casinos. There is also the commonly utilised ability to change office premises to residential.
- 2.13 To support new ventures and pop-ups and avoid buildings being left empty, a separate permitted development right allows a range of uses (such as offices, shops, financial and professional services, restaurants and cafes, hot food takeaways, assembly and leisure uses) to convert temporarily to another use (such as office, shop, financial and professional service, restaurant) for a single continuous

period of up to three years. This right allows start-ups to test a new business model, and then to seek planning permission for the permanent change of use on that or another site. The same right now allows for the temporary change of use to specified community uses (health centre, art gallery, museum, public library, public hall or exhibition hall) to provide a greater mix of uses on the high street and increase footfall, and bring community uses closer to communities.

- 2.14 These permitted development rights are an important component in the re-shaping of a number of town centres throughout the UK. Symptomatic of this, the Government announced in June 2020 plans to introduce a new use class for 'commercial, service and business' in town centres. This proposal would simplify the process of switching between such uses in town centres. Consequently, The Town and Country Planning (Use Classes) Order 1987 was amended on 22 July 2020, and will come into force in England on 01 September 2020 as the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020. The amendments to the Use Classes Order include revoking Parts A and D and introducing three new use classes (Class E, F1 and F2).
- 2.15 These amendments mean that uses previously falling into Use Class A1, A2 and A3 (such as shops, and restaurants), Use Class B1 (including offices), and specific uses within Use Classes D1 and D2 (such as gyms, doctors' surgeries and nurseries) are now combined within a single Use Class (Class E: 'Commercial, Business and Service').
- 2.16 Additional Use Classes F1: 'Learning and non-residential institutions' and F2: 'Local community' have also been created, amalgamating a number of previous Use Classes. In particular, new Use Class F1 covers any use (not including residential) for the provision of education, display of works of art, museum, public library, public reading room, public hall, exhibition hall, for or in connection with public worship or religious instruction or as a law court. New Use Class F2 covers a shop selling mostly essential goods, including food, no larger than 280 sq m and where there is no other such facility within 1,000m radius of the shop's location; a hall or meeting place for the local community; an area or place for outdoor sport or recreation, not involving motorised vehicles or firearms; and an indoor or outdoor swimming pool or skating rink.
- 2.17 In practice, because changes within a single Use Class would not constitute development, this means a number of new changes of use can be carried out without the need for planning permission, notwithstanding any amendments to frontages and signage. Most notably, within Class E, a large shop can now freely change to a gym, an office, a restaurant, a nursery and any combination thereof.

- 2.18 The amendments also take a number of uses (such as pubs and bars, takeaways, music venues and cinemas) out of the Use Class Order, categorising them as “Sui Generis” uses. Each will now need planning permission for any changes to their use, providing further protection to valued local facilities (such as pubs) and further controls for town centres against potentially unwanted uses (such as takeaways).
- 2.19 When the amendments to the Use Class Order were introduced in September 2020, it was also confirmed that all current Permitted Development rights would be reviewed by 31st July 2021. Some existing Permitted Development rights will be revoked, some replaced, and some new rights introduced.
- 2.20 The Government has consulted (from 3rd December 2020 – 28th January 2021) on plans¹ for new Permitted Development rights for the change of use from Use Class E to Use Class C3 (residential), the aim of which is to bring more residential use to high streets. Whilst this proposal is a consultation at this stage, the potential Permitted Development right does not currently propose any size limits on buildings that can benefit from this proposed right and would apply in Conservation Areas and town centres, subject to Prior Approval consideration of transport impacts, flooding, contamination, and amenity considerations.

Tunbridge Wells Borough Council Development Plan

- 2.21 The Tunbridge Wells Development Plan is made up of three documents:
- Site Allocations Local Plan (2016);
 - Core Strategy (2010); and
 - Local Plan ‘Saved Policies’ (2006).
- 2.22 These documents should be read in conjunction with each other and the supporting Proposals Maps. There has been no notable update to the Development Plan since the 2017 Retail and Leisure Study, produced by Nexus Planning, though the Council is currently progressing a (Regulation 18) Draft Local Plan to 2038 that is due to be adopted in June 2022. The draft Local Plan will provide the basis for determining the suitability of development proposals across the Borough to 2038. It will also set

¹ <https://www.gov.uk/government/consultations/supporting-housing-delivery-and-public-service-infrastructure/supporting-housing-delivery-and-public-service-infrastructure>

out the spatial vision and strategic objectives for the Borough. Tunbridge Wells Borough Council voted to progress the latest draft Local Plan to Regulation 19 consultation in February 2021, ahead of submission to the Planning Inspectorate for Examination in Public.

Site Allocations Local Plan (2016)

- 2.23 The Tunbridge Wells Site Allocations Local Plan was adopted in July 2016 and forms part of the Council's statutory Development Plan. The document allocates sites across the Borough to accommodate the level of growth as identified within the adopted Core Strategy (2010) and the supporting evidence base.
- 2.24 The Site Allocations Local Plan identifies locations for development within the main settlements of Royal Tunbridge Wells and Southborough (including the Rural Fringe), Paddock Wood, Cranbrook and Hawkhurst and within the remaining Villages and Rural Areas. Outside these settlements, no site allocations have been made other than bringing forward some existing Local Plan allocations/designations.
- 2.25 The boundaries of the primary shopping areas are defined spatially within the Site Allocations Local Plan through Policy AL/RTW 28 (Tunbridge Wells), Policy AL/SO 5 (Southborough), Policy AL/PW 6 (Paddock Wood), Policy AL/CR 7 (Cranbrook) and Policy AL/HA 7 (Hawkhurst), while policies referring to the uses within these areas are set out in the Local Plan.

Core Strategy (2010)

- 2.26 The Core Strategy was adopted in June 2010 and is the overarching plan in the Tunbridge Wells Local Development Framework and sets out the objectives for the Borough over the plan period until 2026. The objectives surround a wide range of plans, programmes and strategies and drives development to achieve those on the appropriate land. It also focuses on the overarching principles of the Development Plan, setting out the essential development needs of the Borough. In relation to retail hierarchy, the Core Strategy outlines Royal Tunbridge Wells as a Primary Regional Centre, Cranbrook, Paddock Wood and Southborough as Town Centres and Hawkhurst as a District Centre
- 2.27 The Core Strategy outlines Royal Tunbridge Wells as a centre of strategic importance in the South East: a 'regional hub' of economic, social and cultural activity. It goes on to say that retail expansion and the provision of leisure and cultural facilities have helped to maintain the competitiveness of the

high street. In addition, greater ease of movement between the different parts of the town, and better connectivity with the pantiles to the south, has supported independent retailers, bringing vitality to previously underused areas and variety to visitors and customers. Local entrepreneurs are taking advantage of new, flexible accommodation to open and expand small business, particularly on the North Farm/ Longfield Road Industrial Estate, which offers an alternative range of employment opportunities to those found in the town centre.

- 2.28 The Core Strategy identifies Southborough as a 'support town centre' to the regional hub of Royal Tunbridge Wells. While smaller independent traders continue to thrive, contributing to a strong sense of place, a proposed mixed use 'Community Hub' development in the centre has the potential to enhance the services and facilities available to residents.
- 2.29 Paddock Wood, Cranbrook and Hawkhurst are identified as 'local hubs' for a wider rural hinterland, with vibrant centres that provide a range of high quality local services.

Local Plan 'Saved Policies' (2006)

- 2.30 The Local Plan was adopted in March 2006. Following the adoption of the Core Strategy (2010) and Site Allocations Plan (2016) resulted in some policies being removed from the Local Plan as they are no longer valid.
- 2.31 The Local Plan outlines that Royal Tunbridge Wells is the main town centre and the largest shopping area within the Borough, referring to the town as a 'Sub-Regional Centre.'
- 2.32 The Local Plan identifies Southborough as a 'Small Urban Centre' and Paddock Wood, Cranbrook and Hawkhurst are considered to be 'Small Rural Towns'. All centres have a 'primary shopping area' as allocated by the Local Plan proposals map.

Neighbourhood Plans

- 2.33 Tunbridge Wells has 11 designated Neighbourhood Areas, which are as follows:
- Benenden – approved 31 August 2017;
 - Brenchley and Matfield – approved 08 December 2017;
 - Capel – approved 17 February 2020;

- Cranbrook and Sissinghurst – approved 08 June 2016;
- Goudhurst – 07 November 2016;
- Hawkhurst – Neighbourhood Plan approved March 2018;
- Horsmonden – 24 November 2017;
- Lamberhurst – 29 December 2017;
- Paddock Wood – 06 February 2014;
- Pembury – 14 July 2020; and
- Sandhurst – 19 September 2014.

2.34 The Hawkhurst Neighbourhood Plan was adopted March 2018 and recently modified in April 2020. The Hawkhurst Neighbourhood Plan sets out the vision for the area to 2033. It forms part of the Tunbridge Wells Development Plan and as such, any relevant policies within it will need to be considered in determining any future planning applications.

2.35 Of particular relevance is Policy CM4 (Protection of Community Services and Employment Land), which seeks to protect and enhance existing employment, retail and ancillary facilities within the parish over the Neighbourhood Plan period. It also seeks to resist inappropriate changes of use in the primary shopping area.

2.36 A number of Neighbourhood Areas are in the early stages of producing a Neighbourhood Plan:

- Beneden published their draft Regulation 14 Neighbourhood Plan on the 25th August 2019. Following further consultation a draft has been submitted to Tunbridge Wells Borough Council who will undertake a further public consultation (Regulation 16) from the 30th October to the 11th December 2020.
- Brenchley and Matfield published their preliminary draft Neighbourhood Plan for public consultation between the 2nd to 20th March 2020;
- Cranbrook and Sissinghurst's draft Regulation 14 Neighbourhood Plan is out for public consultation between 30 October until 11 December 2020;
- Goudhurst started consultation on their draft 'pre-submission' Neighbourhood Plan, under Regulation 14 from 12th November 2018 to 14th January 2019, and Regulation 16 consultation from 11th January to 22nd February 2021; Horsmonden are in the early stages of preparing their Neighbourhood Plan;
- Lamberhurst carried out a consultation on the Lamberhurst Neighbourhood Development Plan

for a six-week period from 30th October to 11th December 2020;

- Paddock Wood prepared a draft pre-submission Neighbourhood Plan in December 2017. The next steps are to prepare a Regulation 14 draft Neighbourhood Plan;
- Pembury are in the early stages of producing a Neighbourhood Plan, which is moving forward alongside the production of the Tunbridge Wells Local Plan.
- Sandhurst has announced their intention to re-start work on producing their Neighbourhood Plan.

Local Plan Evidence Base

- 2.37 This Retail, Commercial Leisure and Town Centre Uses Study Update will supersede the existing evidence base for Tunbridge Wells, which is currently the Tunbridge Wells Retail and Leisure Study. Nexus Planning undertook the Study on behalf of the Council in April 2017.
- 2.38 Conclusions from the 2017 Study are highlighted below.

Tunbridge Wells Retail and Leisure Study 2017

Quantitative Capacity

- 2.39 Nexus Planning identified a quantitative capacity for new retail floorspace, across each of the Borough's centres during the plan period to 2033, as follows:

Table 2.1: Summary of quantitative capacity for new retail floorspace (2017 assessment)

	Convenience Goods Floorspace		Comparison Goods Floorspace	
	Min	Max	Min	Max
Royal Tunbridge Wells	6,000 sq m	7,600 sq m	23,000 sq m	31,900 sq m
Southborough	300 sq m	400 sq m	-	100 sq m
Paddock Wood	1,000 sq m	1,300 sq m	400 sq m	700 sq m
Cranbrook	300 sq m	400 sq m	300 sq m	500 sq m
Hawkhurst	-300 sq m		100 sq m	
Other Centres	100 sq m	200 sq m	300 sq m	500 sq m
Total	7,500 sq m	9,500 sq m	21,700 sq m	34,000 sq m

Source: Tunbridge Wells Retail and Leisure Study 2017, Appendix D

- 2.40 Based on the conclusions of the previous report, Nexus Planning made a series of strategic recommendations for additional retail capacity for the Borough over the Local Plan period to 2033.

Summary

- 2.41 The NPPF is a pro-growth document with a “presumption in favour of sustainable development”, instructing decision makers to support development unless there are clear adverse environmental, social and/or economic impacts.
- 2.42 The NPPF recognises the importance of promoting the vitality and viability of town centres through a ‘town centre first’ approach to development and a defined retail hierarchy. The policy necessitates that Local Planning Authorities must require an impact assessment for retail development outside of town centres, considering the impact of the proposal on the vitality and viability of the centre.
- 2.43 Both the Tunbridge Wells Local Plan (2006) and the Core Strategy (2010) were adopted prior to the enactment of the NPPF. Even so, they still comprise a number of planning policies that, by and large, comply with the guidance set out for local planning authorities by the NPPF as they relate to the promotion of town centres. Notably, the adopted Plans set out a hierarchy of the town and district centres as well as identifying primary shopping areas, town centre boundaries and shopping frontages to be protected for retail use. In addition, the plans include policies that seek to promote town centre competitive performance and the recently adopted Site Allocations Local Plan allocates retail development throughout the Borough, specifically within the key centres.
- 2.44 The draft Tunbridge Wells Local Plan is currently being progressed, and was recently approved for Regulation 19 consultation ahead of submission for Examination. The new Local Plan will replace the existing Local Plan (2006), the Core Strategy (2010) and the Site Allocations Local Plan (2016). The emerging Local Plan will set out a new hierarchy for the centres of Royal Tunbridge Wells, Southborough, Paddock Wood, Hawkhurst and Cranbrook, as well as establishing what capacity might exist for future retail and leisure provision across the Borough. The Local Plan will also include policies that seek to protect the vitality and viability of town centres.

3.0 Property Market Trends

Introduction

- 3.1 In the following chapter, we review the recent trend impacting the overall property market in Tunbridge Wells. We specifically focus on the market for the types of property/uses which could be delivered within the key centres throughout the plan period (2016-2038) and those uses which are currently included in the Draft Local Plan allocations.
- 3.2 Our review is undertaken to determine what opportunities there are likely to be for new development throughout this period. This will ensure that the planned uses reflect market demand – whether the proposed allocations are sufficient to accommodate demand or whether they are likely to exceed what could realistically be delivered in this timeframe. This assessment will also help to show whether they are in the right locations and if they are likely to be viable and deliverable.
- 3.3 Our assessment relies on analysis of property data and consultation with property agents active in the local market. Data relating to recorded transactions allows us to see what types, sizes and quality of property occupiers have taken in the market. It also shows the volume of transactions and which locations are the most popular. Property data showing available supply highlights the amount of available stock, along with the types, size and quality of space.
- 3.4 Considering these two things together starts to provide an understanding of whether supply is likely to meet the demands of the types of occupiers active in the market. Consultation with property agents then provides greater insight into how the market functions. It gives an understanding of whether occupiers want types of space which are currently unavailable, or if any issues could be addressed to improve market prospects.
- 3.5 We have broken this chapter into sections, focussing on submarkets. In each section, we will discuss available property data and findings from our consultations. Each section will conclude with a brief summary.
- 3.6 In this chapter, we discuss the following:
- Commercial Market

- Retail
- Food and Beverage
- Offices (sub 465 sq m)
- Cinema and Theatre
- Health and Fitness

- Residential Market
 - Market Flats
 - Market Housing
 - Retirement Living
 - Private Rented Accommodation

Commercial Market Review

- 3.7 In this section, we review the commercial property market in Tunbridge Wells Town Centre. For each sector, we provide an overview of the recent market-wide trends before analysing the take-up and availability of current stock. Our findings are then substantiated through consultations with local agents to ensure our research is reflective of recent market conditions. This also provides insight into the type, size and quality of space occupiers want, and whether they favour specific locations within the town. We conclude each section by summarising our findings and drawing conclusions.
- 3.8 Our market data has been obtained from commercial property databases including CoStar and EGI. Given the transient and dynamic nature of commercial real estate markets, the reliability of the data is therefore dependent upon the accuracy of the database inputs and the frequency of updates. As such, there is potential for minor discrepancies in the data collected when compared with other sources. However, for our report, the data provides a reliable snapshot of general market trends and activity.
- 3.9 Further, the outbreak of the Coronavirus (Covid-19) has impacted real estate markets across the world. Whilst the exact consequences remain uncertain, commentators are faced with unprecedented circumstances upon which to base their judgement for forecasting market trends and future activity. Accordingly, whilst many of the sources used to inform our market overviews are considerate of recent exceptional conditions, we acknowledge there is an extent to the reliability of the reports and the potential for circumstances to change.

Retail

- 3.10 This section considers the comparison and convenience retail markets in the Borough of Tunbridge Wells.

Consumer Spending Trends

- 3.11 The Experian Retail Planner Briefing Note (ERPBN18, October 2020) notes that *“the pandemic has brought a change in shopping habits which has favoured local high streets and suburbs over the large city centres”*. Page 3 of the ERPBN, October 2018 sets the following overview of the state of the economy in October 2020:

“Householder spending fell by over 20% q-o-q [quarter on quarter] in the second quarter of 2020, the largest quarterly contraction on record, following the imposition of national lockdown measures. Spending on hospitality, travel and leisure were particularly impacted during the phase. Retail also suffered as businesses were forced to close, however this was cushioned by a pick up in food and online purchases. The subsequent reopening of the economy, pent up demand and measures such as the ‘Eat Out to Help Out’ scheme triggered a rebound in spending in the summer.

However, we expect the initial exuberance from consumers to wane in the coming months, dampening further growth in spending. The prospect of a renewed tightening in public health restrictions will weigh on spending, especially social consumption. Consumer confidence remains in the doldrums and voluntary social distancing behaviours will linger. Alongside this, consumer incomes will continue to be squeezed from a rise in unemployment as the end of the furlough scheme triggers a renewed bout of job losses. Also, wage growth will be subdued as companies continue to struggle financially. Overall, the near term outlook for consumer spending is weak and we do not expect pre Covid-19 pandemic levels to be reached until at least the end of next year”.

- 3.12 Retail sales volumes fell by double-digits in April, due to the closure of non-essential stores as a result of lockdown. The lockdown restrictions were eased in June and July 2020; however, research from the Local Data Company showed that, as of July, 29% of high street shops in England hadn’t reopened (The Guardian, 31 August 2020). The findings pointed towards the inner cities struggling more than local towns and villages, this was due to people remaining working from home and supporting their local community and high street rather than the big inner cities.

- 3.13 The pandemic has encouraged the use of online shopping and diverted footfall away from the centres. Prior to the pandemic the use of online shopping had seen a strong increase. The Experian Retail Planner Briefing Note 17 (ERPBN, February 2020), which was published prior to the pandemic, indicated that the share of special forms of trading, which comprises internet sales, mail order and door-to-door sales, accounted for around 20% of total retail sales (with the internet accounting for a little over 18% of total retail sales in 2019). Appendix 3 of the Experian Retail Planner Briefing Note (ERPBN, October 2020) highlights that the share of special forms of trading (SFT), peaked at over 30% of total retail sales at the height of the pandemic (with the internet accounting for over 30% of total retail sales in 2020). Highlighting the shift in retail spending during the pandemic.
- 3.14 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about opportunities for retailers trading from the high street. In particular, many stores sell online, but fulfil orders from regular stores rather than warehouses⁶, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.
- 3.15 One way in which online expenditure can help sustain bricks and mortar retailers is through the use of the internet to 'click and collect', with purchases being picked up at a dedicated counter within a store. In addition, it is evident that some retailers (particularly those offering big ticket items) are benefitting from having a bricks and mortar presence which can be used as a 'showroom' in order to view and try goods, with some purchases then being made later online. Retailers are also more frequently providing in-store Wi-Fi and 'technology points', which can allow shoppers to browse a wider product range than is carried in-store. Accordingly, whilst new technology provides significant challenges to bricks and mortar operators, it also provides opportunities for more progressive operators that are able to invest in new technology.
- 3.16 Overall, the pandemic has resulted in a change in the way people shop, which has resulted in the requirement for retail floorspace falling; however, online shopping has seen a rise in demand. This is set to continue and it is not clear when the people will return to work; therefore, the future of cities remains uncertain.

Market Overview

- 3.17 Prior to the coronavirus outbreak in early 2020, the UK retail market was experiencing significant structural change. This was primarily caused by the increase in online shopping and e-commerce, as well as a concurrent decrease of footfall in retail locations (i.e. town centres, shopping centres, retail parks). The effects were of particular significance to the high street, where the sector struggled to maintain performance as consumer confidence fell.
- 3.18 The demise of high street retail has been further exacerbated by the political uncertainty associated with the UK's withdrawal from the European Union. Reduced economic output and abrasive supply chains have been cited as potential impacts which could further weaken retail markets. Additionally, retailer costs have increased as a result of rising wages, business rates, commodity prices and pension contributions; all of which have further contributed and intensified concerns.²
- 3.19 In recent months, sectoral difficulties have been compounded by the Covid-19 outbreak which has brought unprecedented uncertainty, complexity and change to the retail market. UK footfall in the week to 23 May 2020 recorded a year-on-year decline of 71.9%; the lowest fall since the week before lockdown measures were introduced.³ This has been of particular significance to comparison retailers, many of whom were classed as 'non-essential' during lockdown forcing widespread closures.
- 3.20 Whilst consumers have gradually been returning to the high street and shopping centres, movement remained up to 40% less in July 2020 when compared to the previous year. Overall consumer confidence remains low, owing to concerns about job security, redundancies, safety during shopping and lower disposable incomes.⁴
- 3.21 As a result of the subdued performance, many comparison / non-essential retailers have been unable to meet rent and service charge obligations in Q2 2020. CBRE report that retail rent collection was at 43% in late June – a decrease of 25% against the same period in 2019. It is anticipated that landlords with tight covenants and limited liquidity will struggle to facilitate debt repayments, potentially resulting in a default increase in the availability of stock. While the Coronavirus Act 2020 provides a

² Deloitte, 2019. *Retail Trends 2019, Retail Re-invented*.

³ Savills, 2020. *Spotlight: UK Retail Outlook Report*.

⁴ CBRE, 2020. *UK Retail Market Summary H1 2020*.

moratorium on commercial lease forfeiture for non-payment of rent, loans and grants from the government may be crucial for retailers.⁵

- 3.22 Falling demand caused by social distancing measures combined with the phased ending of the government's furlough scheme are expected to lead to more closures and job losses over the coming months. Debenhams, Monsoon, Accessorise, Oasis, Warehouse, TM Lewin and Laura Ashley are examples of recent casualties, along with concerns for larger comparison retailers such as House of Fraser. In regards to real estate, this could further increase vacancies leaving shopping centres and high streets with large units to fill.
- 3.23 As a result of the continued uncertainty, landlords' portfolios have seen a reduction in average lease lengths with a threefold increase in leases less than 2-years between 2018 and 2020. Savills estimate that leases over 5-years will amount to just 25% of overall take-up in 2020 – a decrease of 45% from 2016 – demonstrating the desire for occupiers to agree more flexible terms in uncertain times.⁶
- 3.24 Conversely, convenience retail has performed well in recent months and remains buoyant against fading interest in comparison operators. The role of small suburban convenience stores and independent shops has become increasingly prominent since lockdown measures were introduced, encouraged by attempts by consumers to reduce social contact, avoid long queues and make unnecessary journeys. As such it is anticipated that essential retail investments with long leases on FRI terms and RPI index increases could prove more resilient in town centre / high street locations. National occupiers such as Co-op and One Stop are actively looking for new sites, whilst ALDI and Lidl continue their expansion across the country.⁷

Royal Tunbridge Wells Comparison Retail Demand

- 3.25 To understand the typical retail demand in Royal Tunbridge Wells, we have obtained CoStar data for units which have let in the town centre since January 2015 (excluding food & beverage uses). These are shown in Figure 3.1 below. Please note that this data includes both comparison and convenience uses, however we provide a more detailed analysis of the convenience sector specifically later in the chapter.

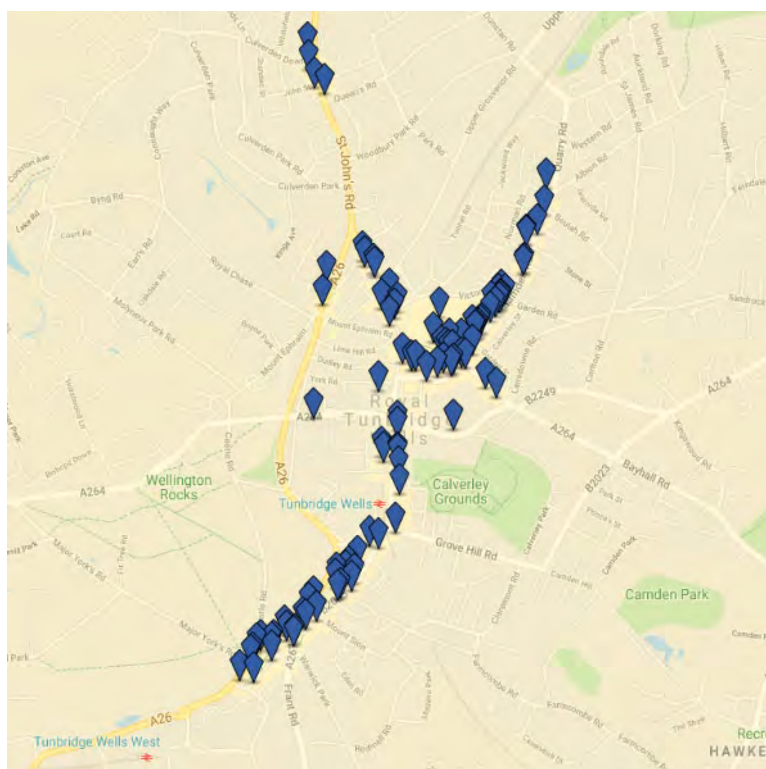
⁵ Lewis Silkin, 2020. *Coronavirus Act 2020 and forfeiture of leases*.

⁶ Savills, 2020. *What impact has Covid-19 had on retail & leisure lease structures in the UK market?*

⁷ SMC Chartered Surveyors, 2020. *How will Coronavirus impact the Commercial Property Market?*

- 3.26 Figure 3.1 shows a fairly linear pattern of leases in Royal Tunbridge Wells which extend from Camden Road in the north-east towards The Pantiles in the south-west. Higher concentrations are evident in the areas surrounding Royal Victoria Place (north) and also along the parades of the High Street and The Pantiles (south). Lower concentrations are shown in the centre of Royal Tunbridge Wells on Mount Pleasant Road and to the north-west along St John's Road (A26).
- 3.27 Occupiers include a mix of larger national brands (Poundland, WH Smith, Wilko, O2, Three etc.) as well as smaller independent operators (boutique fashion brands, bridal shops, gifts etc.).

Figure 3.1: Retail Lease Locations within Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

- 3.28 Table 3.2 summarises the annual take-up on a year-by-year basis.

Table 3.2: Retail Leases since 2015

Year	Units Let	Total Space (sq m)	Size Range (sq m)
2015	31	3,106	21 - 399
2016	29	4,295	32 - 685
2017	35	3,395	21 - 260
2018	22	3,000	17 - 1,220
2019	26	3,664	16 - 420
2020*	5	435	27 - 185
Total	148	17,924	16 - 1,220

Source: CoStar, 2020.

3.29 With the exception of 2020, Royal Tunbridge Wells has had a relatively consistent retail take-up of c. 20 – 35 units / 2,750 - 4,250 sq m per annum. The majority of units leased were below 232 sq m (87%), with only one unit of over 929 sq m let in the past 5 years. This suggests that previous demand in Royal Tunbridge Wells has focussed on smaller-to-medium sized units, with a significantly lower proportion of leases over 232 sq m.

3.30 Table 3.3 summarises the leasing activity by unit size.

Table 3.3: Retail Leases by Unit Size

Size Range (sq m)	No. Leased	Percentage
0 - 46	37	25%
46 - 93	49	33%
93 - 232	44	30%
232 - 465	14	9%
465 - 929	3	2%
929+	1	1%

Source: CoStar & AVL, 2020.

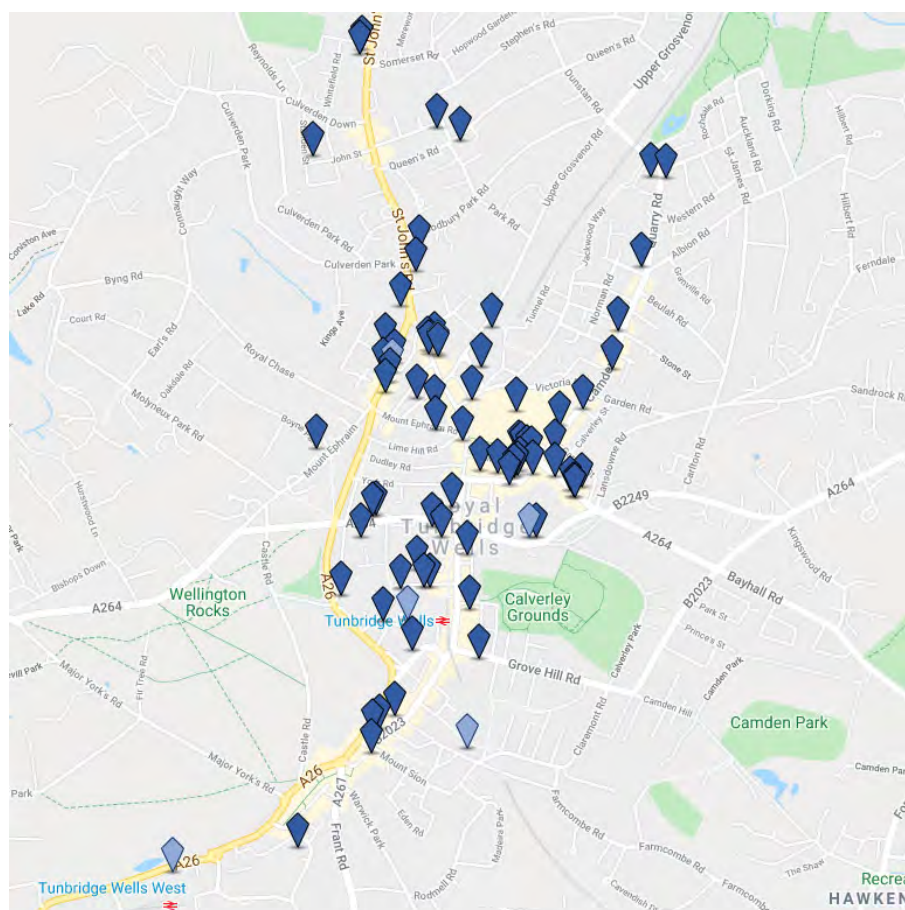
3.31 Table 3.3 further demonstrates the appetite for smaller units, with most leases agreed on units between 46 – 93 sq m. Spaces over 465 sq m have accounted for just 13% of all take-up, with only one of these units for over 929 sq m.

3.32 Of the 148no. leases identified, just under half (71no.) recorded the term agreed with the incoming tenant(s). These ranged in length from 10-months to 20-years, with an average term of 8.5-years / median of 10-years. This conflicts with market reports which suggest that the proportion of leases below 5-years has increased in recent years, however we note that less than half of the sample has

confirmed lease lengths. Also, the trend towards shorter lease terms is relatively recent and historic data may not yet reflect this movement.

- 3.33 In terms of rents, effective and achieved rates agreed since 2015 range from c. £97 - £1,302 psm, with an average of £377 psm. Smaller units generally achieved higher £ / psm rents, with the medium-to-larger units achieving values closer to the sample median of £282 psm. CoStar analytics suggest that the market rent in the Royal Tunbridge Wells retail submarket is c. £366 psm.
- 3.34 We have also reviewed sales of retail spaces in Royal Tunbridge Wells which have completed since January 2015. Figure shows a more sporadic distribution of retail unit sales when compared to the lease transactions over the same period.

Figure 3.4: Retail Sales Locations within Royal Tunbridge Wells Town Centre and surrounds



Source: CoStar, 2020.

- 3.35 Our search revealed 36no. transactions which amount to a gross floorspace of 50,416 sq m, however this includes the sales of Royal Victoria Place (37,002 sq m) and Great Hall Arcade (4,881 sq m). Once

these shopping centres are removed from consideration, the gross floorspace sold from individual retail units amounts to 8,532 sq m.

3.36 The majority of purchasers recorded were real estate and investment management companies (CBRE, British Land, Evolve Estates etc.), with only one sale to a private independent buyer.

3.37 Table 3.5 summarises the year-on-year sales since 2015.

3.38 The data shows there has been no consistent trend of retail unit sales since 2015, with variable floorspace and unit numbers each year. This inconsistency remains unchanged once the larger shopping centre transactions (Great Hall Arcade in 2015 & Royal Victoria Place in 2018) are removed from consideration, although the range becomes considerably more confined with c. 3-9no. transactions / 353 – 32,880 sq m per annum.

Table 3.5: Retail Sales since 2015

Year	Units Sold	Total Space (sq m)	Size Range (sq m)
2015	9	7,948	51 - 4,881
2016	9	786	28 - 150
2017	6	2,852	41 - 1,486
2018	9	38,476	88 - 37,002
2019	3	354	48 - 193
2020*	0	-	-
Total	36	50,416	28 - 37,002

Source: CoStar & AVL, 2020.

3.39 Table 3.6 shows the distribution of retail unit sales by size.

Table 3.6: Retail Sales by Unit Size

Size Range (sq m)	No. Leased	Percentage
0 - 46	3	8%
46 - 93	9	25%
93 - 232	14	39%
232 - 465	3	8%
465 - 929	3	8%
929+	4	12%

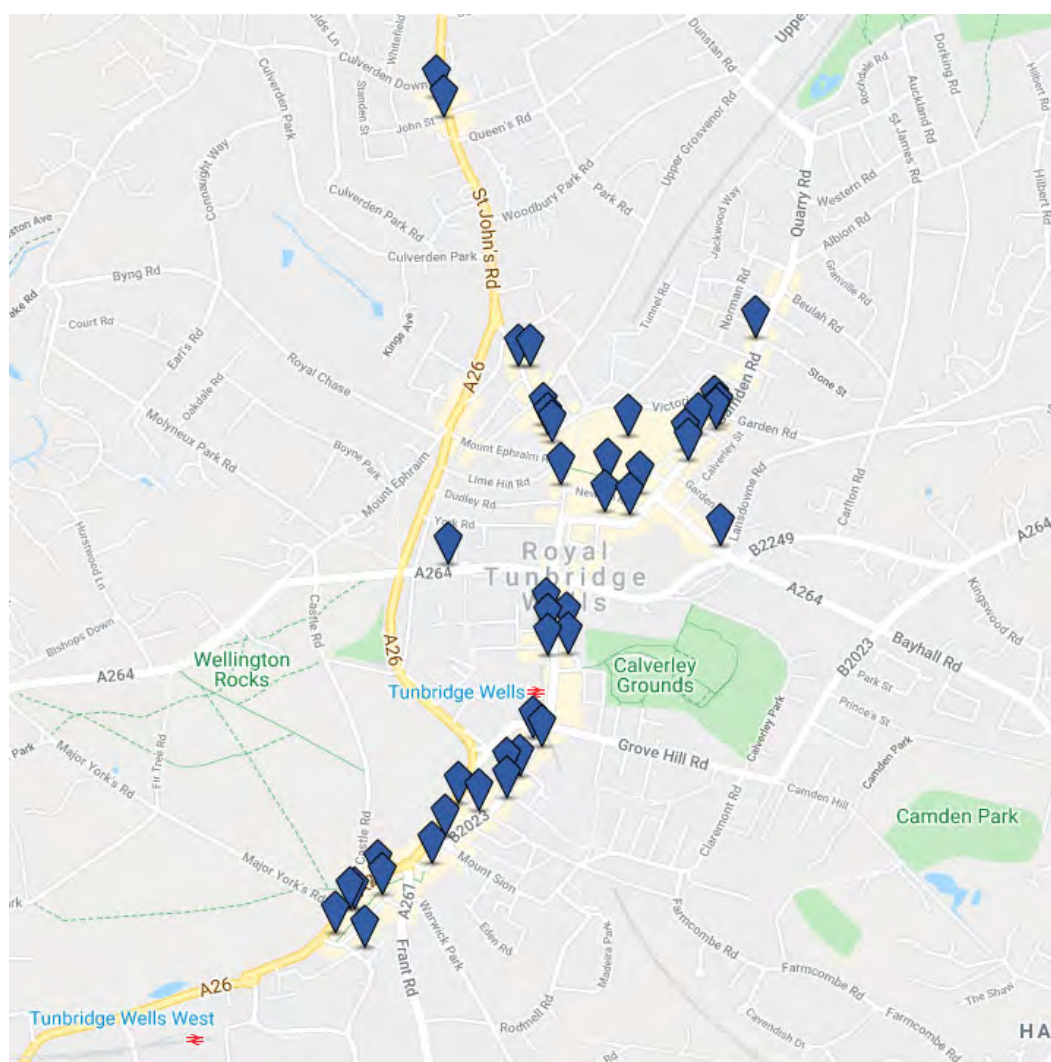
Source: CoStar & AVL, 2020.

- 3.40 In similar trend to the lease transactions, the majority of sales have been for retail units of up to 232 sq m (72%).
- 3.41 However, in contrast, there have been a greater number of larger units which have sold in the past 5-years including two district shopping centres. The sales data supports the dominance of smaller retail units in Royal Tunbridge Wells Town Centre in both the northern and southern concentrations.

Royal Tunbridge Wells Comparison Retail Supply

- 3.42 In regards to supply, we have identified c. 6,410 sq m of available retail space in the town centre across 42no. units. The location of these units is shown in Figure 3.7.

Figure 3.7: Retail Lease Availability in Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

- 3.43 The pattern of available spaces is similar to those leased within the last 5 years, with the same linear arrangement running from the north-east to the south-west of the town centre.
- 3.44 The division of spaces is reasonably equal, with 20no. units located south of the A264 (i.e. High Street, Mount Pleasant Road and The Pantiles) and the remaining 22no. units located to the north of the town centre (i.e. Royal Victoria Place, Camden Road & St John's Road). This shows that space is available throughout the town centre and vacancy is spread rather than being concentrated in a specific location.
- 3.45 Based on the average annual retail take up of c. 3,485 sq m the current availability c. 6,410 sq m suggests that, overall, there is sufficient floorspace to meet typical demand for 1.5 – 2-years.
- 3.46 Table 3.8 summarises the spaces available by unit size.

Table 3.8: Retail Space to Let by Unit Size

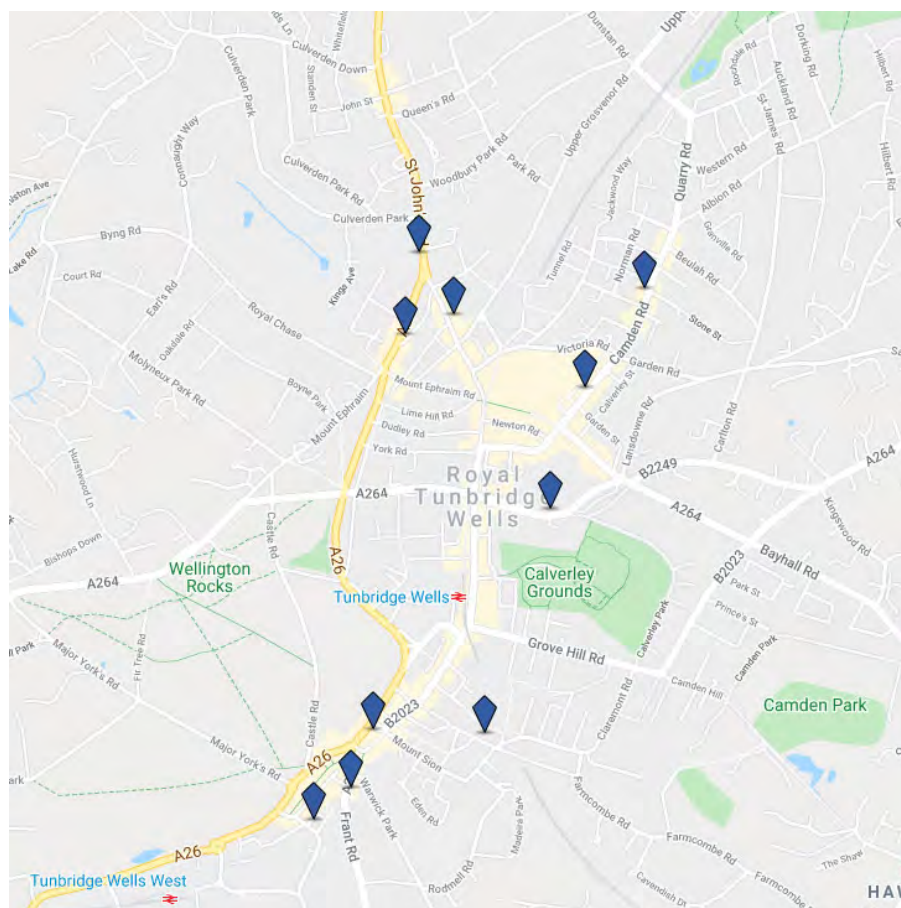
Size Range (sq m)	No. Available	Percentage
0 - 46	6	14%
46 - 93	18	43%
93 - 232	11	26%
232 - 465	6	14%
465 - 929	0	0%
929+	1	2%

Source: CoStar & AVL, 2020.

- 3.47 The majority of units currently available in the town centre are between 46 - 93 sq m in size, with 83% of available stock being for units of up to 232 sq m. Based on previous demand trends (i.e. from 2015 onwards), this suggests that the most popular unit sizes are currently available in the preferred locations. There is a significantly lower number of larger units available (7), suggesting that irrespective of demand, there is a lower proportion of existing town centre units above 465 sq m.
- 3.48 Confirmed asking rents for individual units within the sample range from £118 - £775 ps m, with an average of £328 ps m psf. CoStar data analytics suggest that average asking rent across the Royal Tunbridge Wells retail submarket is currently £332 ps m. This suggests that retail rents may have softened in recent years in line with general market trends.

- 3.49 We have also reviewed the sales market for retail units currently advertised for sale. Our search revealed 10no. units which amount to c. 1,700 sq m of retail space, as shown in Figure 3.8.
- 3.50 There is no strict pattern of sales listings in the town centre. The majority are concentrated around Royal Victoria Place to the north and The Pantiles to the south, with a few units located to the north-west of the town centre on St Johns Road.
- 3.51 Of the listings identified, we note that 4no. are currently shown to have an offer agreed, however there is no strict correlation with any part of the town centre to suggest that units are sought in a particular location.

Figure 3.8: Retail Sales Availability within Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

3.52 Table 3.9 shows units listed for sale by size.

Table 3.9: Retail Unit for Sale by Unit Size

Size Range (sq m)	No. Available	Percentage
0 - 46	0	0%
46 - 93	4	40%
93 - 232	3	30%
232 - 465	3	30%
465 - 929	0	0%
929+	0	0%

Source: CoStar & AVL, 2020.

3.53 Despite a lack of very small units (i.e. up to 46 sq m), the sample upholds the trend identified earlier of smaller retail units in Royal Tunbridge Wells, with 70% being between 46 – 232 sq m. None of the units currently listed for sale are larger than 465 sq m.

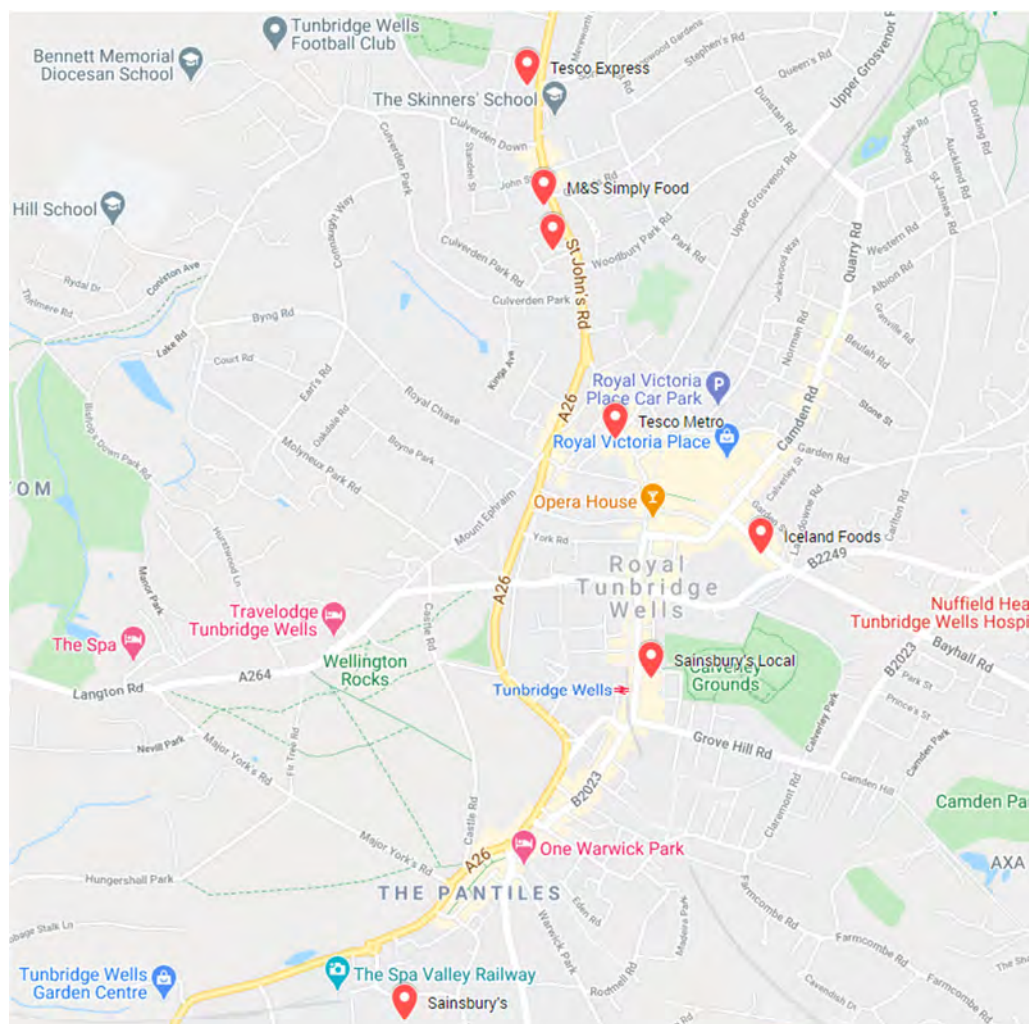
Royal Tunbridge Wells Convenience Retail

3.54 As some of the potential site allocations in the emerging Draft Local Plan specifically refer to the provision of convenience retail uses, we have briefly reviewed the existing provision in and around the town centre along with recent transactional evidence. Figure 3.10 shows the location of the existing convenience retailers in Royal Tunbridge Wells.

3.55 Specifically, the current convenience retail offering includes:

- a. Sainsbury's Supermarket, Linden Park Road – 8,593 sq m
- b. Tesco Metro, Grosvenor Road – 1,790 sq m
- c. Sainsbury's Local, Great Hall Arcade – 1,220 sq m
- d. Tesco Express, St John's Road – 317 sq m
- e. Iceland Foods, Calverley Road – 232 sq m
- f. M&S Food Hall, Royal Victoria Place – 5,351 sq m
- g. M&S Simply Food, St John's Road – unknown size
- h. Waitrose & Partners, St John's Road – unknown size
- i. Iceland in The Range, Vale Rd – unknown size
- j. Lidl, Old West Station, Broadwater Lane (to open Spring 2021) – 2,109 sq m

Figure 3.10: Royal Tunbridge Wells Convenience Retail



Source: Google MyMaps, 2020.

- 3.56 Other smaller operators such as Londis and Costcutter also occupy units within the centre of Royal Tunbridge Wells, as well as a c. 3,900 sq m Asda Superstore approximately 2.5-miles north-east of the town centre. Tesco are also located at Pembury Park (2,086 sq m), M&S Home have a 4,645 sq m unit at Fountains Retail Park, and Aldi opened a 2,508 sq m store at Great Lodge Retail Park in October 2019.
- 3.57 Of the premises listed above, Sainsbury's Local in the Great Hall Arcade is the only town centre unit to have transacted since January 2015. A 15-year lease was agreed in December 2018 at an effective rent of £129 psm. This includes two rent reviews at 5- and 10-years respectively and a break clause installed at 10-years.

- 3.58 Lidl has agreed terms on a site (2,109 sq m) on Linden Park Road to open Spring 2021, taking half the space previously occupied by Homebase (c. 4,249 sq m), whilst a new c. 2,508 sq m Aldi opened at Great Lodge Retail Park in 2019.
- 3.59 In 2015, an EIA Screening Opinion was submitted by Aldi for the Eridge Road site to the rear of the Esso service station. Although it is unclear whether they still have an interest in the site, this shows that Aldi have considered a town-centre location.
- 3.60 The existing and forthcoming convenience offering in Royal Tunbridge Wells is diverse, providing upper-end occupiers such as M&S as well as the emerging discount operators of Lidl and Aldi. The unit sizes also cater to all convenience retail needs, with smaller local and metro style stores, and larger warehouse-style superstores. As such, and based on the relatively scarce take-up in recent years, the existing provision is likely sufficient to meet current levels and types of demand.

Agent Consultation

- 3.61 To verify our findings, we have undertaken telephone consultations with locally-operating commercial agents. This also provides an understanding of recent market trends which we are unable to determine from the data samples, including occupier requirements, locational preferences and general market sentiments. Our findings are summarised in the points below:
- The retail market in Royal Tunbridge Wells was underperforming even before the Covid-19 pandemic. Demand for town centre units has not been high enough, particularly in the north of the town centre towards Royal Victoria Place. The areas south of the Town Centre such as the High Street and The Pantiles are experiencing greater demand at present, however it remains subdued overall. Occupiers are typically seeking smaller spaces of between 93 – 186 sq m for the likes of boutique clothing shops and arts and crafts spaces.
 - There was a common perception amongst agents that things needed to change in the town centre to help encourage demand. Several consultees referred to the constrained and inaccessible nature of transport infrastructure in the town centre which consequently lowers footfall. It was reported that people do not want to queue to come in for a short shopping trip and will instead make fewer, larger shopping trips because of the inconvenience. Current parking provision was considered restrictive and expensive, which prevents people from coming into town and using the services. Consequently, major operators are not wanting to take space in Royal Tunbridge Wells.

- All consultees stated that there was sufficient space available at present to meet current levels of demand. This was universally attributed to the unique circumstances and uncertainty arising from the pandemic, however it was not anticipated that retail development would be viable in the short-to-medium term. Further provision of retail space in the town centre would only increase the vacancy rate.
- Some agents suggested that the focus should be on retaining current occupiers with specific reference to the department stores, Fenwick and Hoopers. One agent described the prospect of one of these operators leaving Royal Tunbridge Wells as 'disastrous' and 'a tragedy'. Agents had experienced a noticeable drop in occupiers seeking larger units and encouraged the focus to be on making smaller units more attractive through flexible terms and reductions to business rates and rents.
- Agents were aware of the interest from Lidl to take space in the town centre but otherwise considered the existing convenience offering to be suitably varied. It is unlikely that a significant amount of additional convenience space is necessary unless there was growth in the number of town-centre residents.

Retail Market Summary

- 3.62 National retail markets have experienced difficulties in recent years and our findings indicate that Royal Tunbridge Wells is no exception to wider market trends. This is of particular significance to comparison retail where the growth of online shopping has come at the expense of bricks and mortar retail outlets in established retail locations.
- 3.63 The data suggests that current retail supply is sufficient to meet typical levels of demand. Previous take up has been relatively consistent at c. 2,790 – 3,715 sq m per annum, with a preference for smaller units up to 232 sq m, and these types of units are shown to be available at present with a total floorspace availability of c. 6,225 sq m.
- 3.64 Sales of retail premises have been less consistent, with general take-up between 930 – 2,790 sq m per annum, however the focus again concerns smaller units of up to 232 sq m. Current availability amounts of 1,700 sq m and is therefore likely to meet demand for 1 – 2-years.
- 3.65 The data is consistent with the observations made by local agents, who agreed that current availability is sufficient to meet the subdued levels of demand. Several respondents cited the importance of

retaining the existing occupants in the town centre, with particular reference to the two department stores. It was suggested that this could be achieved through cuts to rents and business rates as well as improvements to town centre infrastructure.

- 3.66 Whilst current supply is sufficient, it is anticipated that new residential development in the town centre could help increase footfall and provide opportunities for some new convenience retail floorspace. An influx of new centrally-located residents could also contribute to the vibrancy and vitality of the surrounding commercial uses. However, without such, it is likely that the provision of additional retail floorspace will only increase vacancy rates in the town centre. It is also arguable that new convenience requirements should be accommodated in existing retail space, as more of this stock could become vacant due to the weakening comparison goods market.

Food & Beverage

- 3.67 This section considers the food and beverage (F&B) market in Royal Tunbridge Wells including restaurants, pubs and cafes.

Market Overview

- 3.68 In a similar trend to retail, the F&B sector has experienced difficulties over the past few years with several high-profile Company Voluntary Arrangements (CVAs) and closures. Most recently, this has included the following:
- Yo! Sushi announced plans to permanently close 19 restaurant sites as part of a company-wide restructure (August 2020).
 - Pizza Express announced a restructuring plan that would see up to 15% of its estate shut via a CVA, with up to 1,100 jobs at risk (August 2020).
 - Casual Dining Group, owners of brands including Bella Italia, Café Rouge and Las Iguanas, closed 91 sites after falling into administration in July 2020 (subsequently acquired in August 2020).
 - J.D. Wetherspoons reached an agreement to defer rent payments on select premises until 2021.
 - The Restaurant Group (Frankie & Benny's, Garfunkel's) launched its proposed CVA and confirmed talks with landlords about restructuring options for its UK leisure estate (June 2020).

- 3.69 Concurrently, the sector has seen a rise in experience-seeking consumers, with diners choosing innovative independent restaurants over larger, chain-style operators. The cultivation of new and inventive dining environments is considered pivotal to ensuring repeat business and maintaining customer bases.⁸ This increased diversity of restaurant operators has led to more competition in the market, which provides some explanation as to why larger operators have faced difficulties.
- 3.70 Market conditions have become increasingly challenging through the Brexit vote and Covid-19. The uncertainty for both consumers and investors has led to decreased demand for F&B premises, alongside further considerations of increased import costs, rises in the Living Wage and reliance of EU workforces. These factors may potentially lead to a slowing in acquisitions and are expected to be felt most strongly in secondary markets.⁹
- 3.71 As a result, some operators are moving towards smaller spaces to minimise their capital expenditure, rent and rates liabilities, and backing up sales through takeaway and delivery supported by companies such as Deliveroo and Uber Eats.¹⁰ Further, market commentators suggest there may be opportunities for innovative operators who can secure sites on favourable terms from desperate landlords. Whilst these alternatives may provide solutions for both occupiers and landlords, flexible arrangements offer little security or stability over the longer term.¹¹

Royal Tunbridge Wells F&B Demand

- 3.72 Figure 3.11 below shows the location of F&B units (formerly under use classes A3-A5) which have leased in Royal Tunbridge Wells Town Centre since 2015.

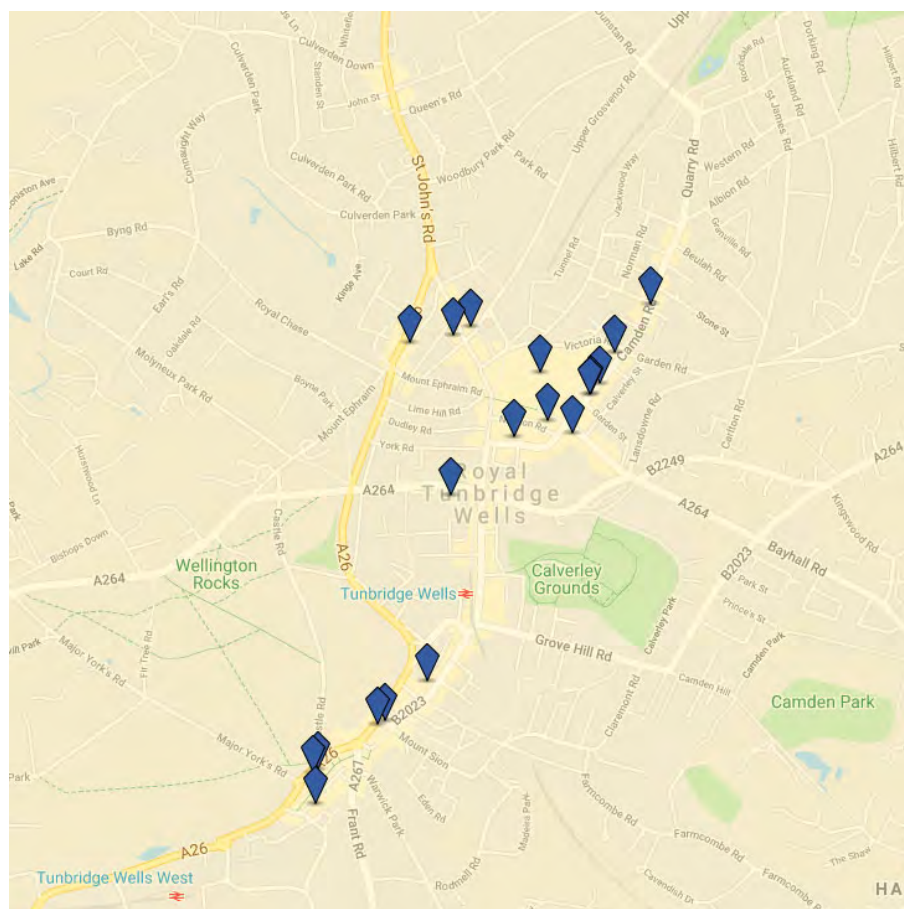
⁸ Legal & General, 2018. *2018 The Future of Leisure*. (p. 25)

⁹ Savills, 2017. *UK Commercial Leisure: Q1 2017*.

¹⁰ Property Week, 2019. *Fluid opportunities on the horizon for casual dining in 2019*.

¹¹ Property Week, 2020. *Coronavirus adds to restaurant industry's woes*.

Figure 3.11: F&B Lease Locations in Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

- 3.73 The map shows a more sporadic distribution of units when compared to conventional retail (i.e. shops / professional services). The F&B units are located in clusters around the main retail concentrations at the northern and southern ends of the town centre, with the majority located north of the A264 (c. 65%). This suggests that occupiers have previously favoured locations where they can benefit from passing trade generated by nearby shops and amenities.
- 3.74 The majority of take-up has been by smaller operators including independent coffee shops, cafes and public houses. Only two spaces have been leased by larger more reputable occupiers; Creams Café LTD on Grosvenor Road, and Marston's (Pitcher & Piano public house) on Church Road.
- 3.75 Table 3.12 provides a year-by-year summary of the F&B unit let since 2015.

Table 3.12: F&B Leases since 2015

Year	Units Let	Total Space (sq m)	Size Range (sq m)
2015	7	1,227	60 - 370
2016	2	426	186 - 240
2017	6	1,289	43 - 524
2018	2	486	118 - 368
2019	2	545	112 - 433
2020*	1	32	32
Total	20	4,005	32 - 524

Source: CoStar & AVL, 2020.

- 3.76 F&B take-up has been less consistent than conventional retail, ranging from c. 415 – 1,300 sq m / 2 – 7 no. units per annum (excluding 2020). With the exception of leasing activity in 2017, there has been a general year-on-year decline in the number of F&B units let since 2015, suggesting a lessening demand and / or adequate existing supply in the town centre. Table 3.13 summarises the F&B leases by unit size.

Table 3.13: F&B Leases by Unit Size

Size Range (sq m)	No. Leased	Percentage
0 - 46	2	10%
46 - 93	3	15%
93 - 232	8	40%
232 - 465	6	30%
465 - 929	1	5%
929+	0	0%

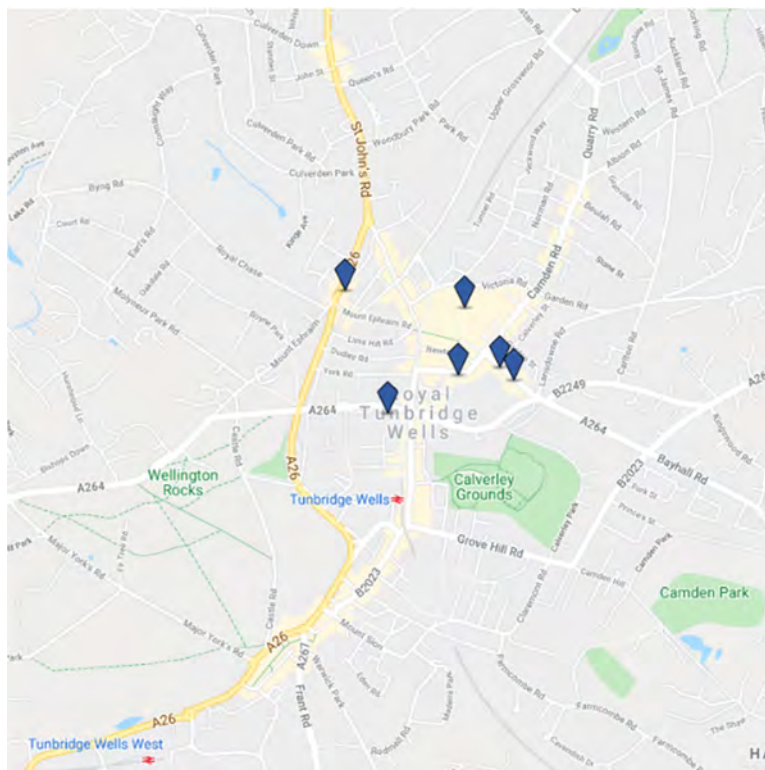
Source: CoStar & AVL, 2020.

- 3.77 The sample shows that leasing history for F&B units has concerned small-to-medium sized spaces, with 70% of units between 93 -465 sq m. Like conventional retail, the data suggests there has been a lack of demand for larger units of above 465 sq m. Further, there does not appear to be any strict relationship between unit size and location, with a mix of larger and smaller units in both the northern and southern concentrations.
- 3.78 Over half of the F&B sample disclosed the term agreed within the incoming tenant(s). Like conventional retail, these were wide-ranging, starting from 1-year terms up to 35-years. The average of 10.7-years also conflicts with market expectations, although it was noted that the longest term of

35-years was agreed with national public house operator, Marston's. With this lease removed from consideration, the average term decreases to 8.7-years.

- 3.79 Achieved and effective rents ranged from c. £129 – £775 psm, with an average of £277 psm. The average value achieved in the last three years (£345 psm) is over £10 psf higher than the average achieved from 2015 – 2017. It is noted however that the sole unit let in 2020 thus far achieved a rent of £773 psm which could potentially skew the data.
- 3.80 The data does not include the F&B units located within the Central Market of Royal Victoria Place, which replaced the Ely Court area of the shopping centre in late 2019. The covered courtyard is similar to London's food hall concept; providing a selection of international cuisines, refreshments and evening entertainment. We have been unable to identify any information about the unit sizes or lease terms for the current occupants of Central Market but understand that most of the units are currently occupied.
- 3.81 In terms of sales, we have identified 6no. transactions of F&B premises which have transacted since January 2015, as shown in Table .
- 3.82 The units have been inclined to the northern end of the town centre, with only one transaction located on the southern side of the A264. The spaces are a mix of restaurants and public houses, ranging from c. 178 - 527 sq m in size and amounting to a gross floorspace of c. 2,137 sq m. This supports the earlier trends identified from F&B lease transactions, where the units were generally larger than conventional retail but still unlikely to exceed c. 465 sq m.
- 3.83 Buyer profiles have varied and include a mix of real estate companies, investment agencies and the Borough Council (33 Monsoon Road).

Figure 3.14: F&B Sale Locations



Source: CoStar, 2020.

Royal Tunbridge Wells F&B Supply

- 3.84 At the time of our assessment, there was only one F&B unit to let in Royal Tunbridge Wells – a 257 sq m restaurant on Mount Ephraim to the north of the town centre. Over the past 5 years, the lowest annual take-up of F&B space was recorded in 2016 where c. 418 sq m was leased across two units. On this basis, the current supply is insufficient to meet even the lowest level of typical demand, however with consideration for the sectoral difficulties arising from the coronavirus outbreak and Brexit, it is unlikely that demand for F&B space will be high in the immediate and short-term future.
- 3.85 There were no sales listings for F&B units in the town centre on CoStar at the time of our review.

Agent Consultation

- 3.86 We contacted local agents to discuss the F&B market in Royal Tunbridge wells. Their comments are summarised as follows:

- Restaurants have been 'hit hard' in Royal Tunbridge Wells leading to several closures across the town centre. Some had originally been instigated by the coronavirus lockdown measures, however local demand has been insufficient to justify reopening and many units remain closed.
- One agent noted that it has been 'some time' since an F&B occupier enquired about taking space in Royal Tunbridge Wells. Previously, occupiers had increasingly sought flexible lease terms in the town centre. This was considered necessary to help attract occupiers, however it was recognised that these terms offered no guarantee that occupiers would renew or extend their leases.
- The preferred location for F&B units has been towards the south, which was considered by agents to be the more affluent end of town. Those units which have been leased most recently have been larger, typically between 232 - 465 sq m. A shared perception amongst agents was that the existing stock was there to be taken, regardless of whether it is occupied or not, and further provision of F&B floorspace was considered unnecessary at present.

F&B Market Summary

- 3.87 The F&B market trends are similar to those experienced in the retail sector, in that recent years have brought difficulties and change. These have been exacerbated more recently by Brexit and the Covid-19 pandemic, leading to increased numbers of high-profile closures and CVAs.
- 3.88 It is not anticipated that this will be a long-term trend, as the social needs of consumers will inevitably return once it is perceived safe to do so; however, it is expected that larger chain-style operators will diminish as consumer culture continues to be driven by innovation, experience and convenience.
- 3.89 The F&B take-up in Royal Tunbridge Wells has varied from 465 - 1,395 sq m per annum, with size requirements typically bigger than those sought for conventional retail (e.g. 30% between 232 - 465 sq m). Sales of F&B premises have been less frequent but generally between 139 - 465 sq m per annum.
- 3.90 Current availability is low, with only one unit shown to be available at the time of our research. At 257 sq m, this would be insufficient to meet the lowest levels of demand demonstrated over the past 5-years. However, our consultations with local agents revealed that several F&B uses in the town centre are not presently in operation and there was a shared uncertainty about the prospects of certain F&B premises reopening. As such, there may be increases in F&B availability over the coming months.

- 3.91 Further, recent amendments to the Use Classes Order now mean that space previously restricted for retail and business use can now be used for food and beverage, under the new E Use Class. This increased flexibility means that a wider range of space can meet any future F&B requirements.
- 3.92 Accordingly, it is not anticipated that additional F&B floorspace will be necessary in the short-term. There may be some new opportunities however, if structural changes are made in the town centre which encourages new consumers and visitors into the town centre (i.e. influx of residents, new leisure / entertainment / nightlife facilities). Over the medium-to-longer term, F&B operators are likely to play a more prominent role in driving town centre footfall, potentially replacing high street comparison units as they look to move operations online.
- 3.93 In the interim, there may be opportunities for shorter-term 'meanwhile' uses of similar format to those introduced at Central Market. Pop-up-style food stalls and temporary bars could help encourage town centre footfall and vitality whilst also offering consumers convenience and new experiences.

Office (sub 465 sq m)

Office Market Overview

- 3.94 After a strong first quarter where take-up volumes were 18% above the long-term average, the coronavirus pandemic and subsequent lockdown restrictions caused a significant decrease in Q2 2020. Combined, the H1 2020 take-up reached c. 102,000 sq m in London and the South-East but remained 28% below the long-term average. This is expected to continue into the third quarter as occupiers re-evaluate space requirements and working practices over the short-to-medium term.¹²
- 3.95 Although there is continued uncertainty in the market, there is also a lack of higher-quality office space throughout the UK. Current availability is 9% below the five-year average in the south-east, with a lack of Grade A space in particular.
- 3.96 Under normal circumstances, these conditions typically encourage new development. However, concerns over rental growth as a result of weakened economic conditions are likely to delay

¹² Colliers International, 2020. *South East Offices*.

speculative office development. In many instances, rental levels also currently make new office space unviable.

3.97 Before the coronavirus pandemic, national demand was being driven by flexible workspace providers who increased their take up by 25% in 2018; a similar rate to the preceding year. This sector is expected to continue to grow over the next five years, with flexible space expected to account for 8.5% of total office stock by 2023.¹³

3.98 Market commentators have reported a noticeable increase in requirements for fitted office space as occupiers look to avoid initial capital expenses on fitting out spaces when entering new leases.¹⁴

3.99 Moving forward, landlords and tenants will be encouraged to work together, taking a more flexible approach to lease starts and commencement dates. Some tenants are also protecting themselves by extending current leases on flexible and short-term bases. In their report on 'The future of global office demand', JLL¹⁵ expect that four key factors will have a major role in shaping the future of office demand in both the short and longer-term:

- **Remote working** – lifestyle flexibility vs. appropriateness of working environment at home
- **Office design** – suitable occupational densities and safe workspaces
- **Technology** – smart office buildings which support companies' social and wellness initiatives
- **Commuting patterns** – current concerns with public transport are preventing office re-entry for many

Royal Tunbridge Wells Office Demand

3.100 Our review of the office market in Royal Tunbridge Wells has focussed on smaller units of up to 465 sq m. Durlings has reviewed the market for larger office spaces separately at Chapter 6.

3.101 Figure 3.15 shows the location of office spaces which have let in Royal Tunbridge well since January 2015.

3.102 The map shows a similar pattern to the location of retail and F&B units, with northern and southern concentrations amongst the main commercial parades. It is noted that the general distribution is

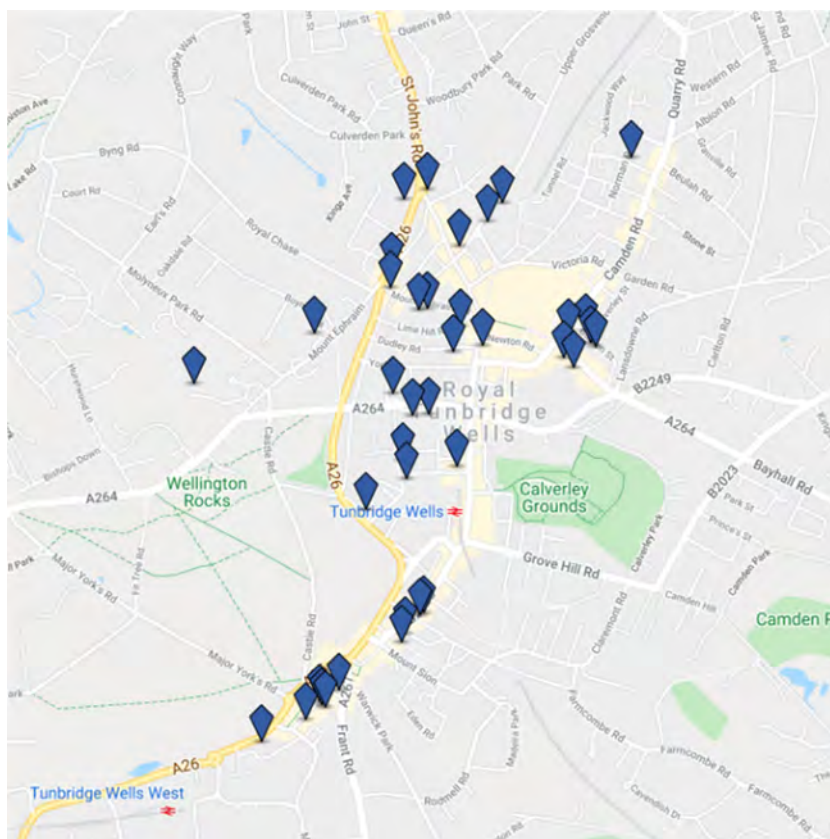
¹³ JLL, 2019. *Disruption or Distraction, Flex Space*.

¹⁴ Colliers International, 2020. *South East Offices*.

¹⁵ JLL, 2020. *The future of global office demand*.

more scattered, particular in the north where spaces are located on secondary roads behind the main transport infrastructure. Table below shows the annual office take-up since 2015.

Figure 3.15: Office Lease Locations in Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

Table 3.16: Office Leases since 2015

Year	Units Let	Total Space (sq m)	Size Range (sq m)
2015	22	2,764	13 - 362
2016	16	1,260	4 - 372
2017	17	1,192	8 - 297
2018	12	1,392	32 - 235
2019	6	965	21 - 372
2020*	0	-	-
Total	73	7,573	4 - 372

Source: CoStar & AVL, 2020.

3.103 Take-up of office space in the town centre has varied. The highest take-up was recorded in 2015 where c. 2,790 sq m of floorspace was leased across 22no. units, however this dropped to a more

consistent level of between c. 930 - 1,395 sq m annum between 2016 - 2019. As of August 2020, there have been no lease transactions recorded for town centre office space up to 465 sq m.

3.104 Only 14no. units within the sample disclosed the name and nature of the incoming tenants. These were a range of both smaller, locally-based businesses and larger national companies with regional office requirements (e.g. Coutts & Co, Brewin Dolphin, Atos IT Services).

3.105 Table 3.17 below summarises the leases by unit size.

Table 3.17: Office Leases by Unit Size

Size Range (sq m)	No. Leased	Percentage
0 - 46	27	37%
46 - 93	16	22%
93 - 232	23	32%
232 - 465	7	10%

Source: CoStar & AVL, 2020.

3.106 Over half of the leases agreed since 2015 have been for units of up to 1,000 sq ft, with smaller units of up to 46 sq m proving most popular. This suggests that previous demand in the town centre has come from occupiers with smaller space requirements, potentially SMEs, start-ups or single-person operators.

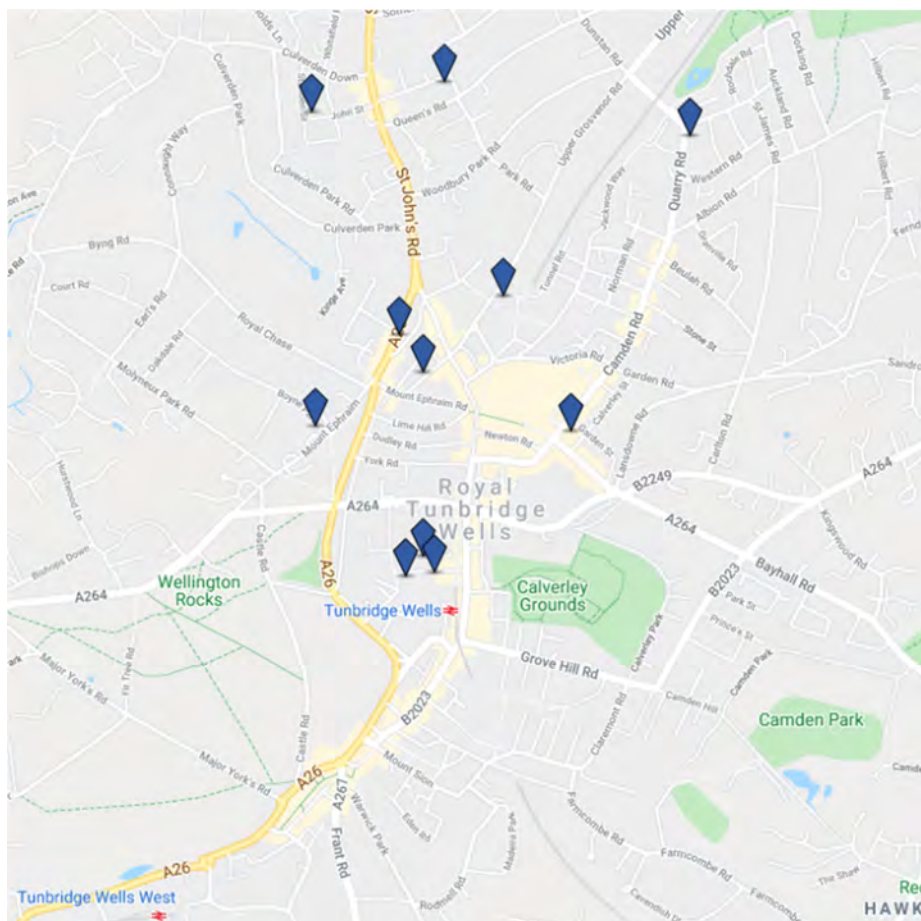
3.107 Only 25% of the sample disclosed the lease lengths agreed, which ranged from 1 – 10 years with an average term of 5.8-years. Rents ranged from c. £118 - £291 psm, with an average achieved or effective rate of £202 psm. CoStar analytics report a recent fall in market rents, which currently average £206 psm across the Royal Tunbridge Wells office submarket (please note, this data is likely to include larger premises of 465+ sq m).

3.108 In terms of sales, over 2,230 sq m of office space has transacted in Royal Tunbridge Wells Town Centre since January 2015.

3.109 The map shows a varied distribution of office spaces which are generally towards the northern end of the town centre. With the exception of three units located just north of the train station, the remaining 11no. offices are located north of the A264. Like the lease transactions, there is a higher proportion of office spaces located on secondary roads away from the main town centre when compared with other commercial uses.

3.110 The locations are shown in Figure 3.18.

Figure 3.18: Office Sales Locations across Royal Tunbridge Wells Town Centre and surrounds



Source: CoStar, 2020.

3.111 Table 3.19 summarises the year on year sales of office space.

Table 3.19: Office Sales since 2015

Year	Units Sold	Total Space (sq m)	Size Range (sq m)
2015	2	250	106 - 144
2016	6	464	29 - 233
2017	3	963	146 - 449
2018	2	287	122 - 165
2019	1	325	325
2020*	0	-	-
Total	14	2,289	29 - 449

Source: CoStar, 2020.

- 3.112 With the exception of 2017, office sales have typically amounted to 251 – 465 sq m per annum, with a maximum of 6no. sales in a single year. Like the office leases, there have been no transactions recorded for office spaces up to 465 sq m in 2020.
- 3.113 Table 3.20 shows the breakdown of sales by unit size.

Table 3.20: Office Sales by Unit Size

Size Range (sq m)	No. Sold	Percentage
0 - 46	3	21%
46 - 93	2	14%
93 - 232	5	36%
232 - 465	4	29%

Source: CoStar, 2020.

- 3.114 Unlike the lease data, the majority of sales transactions have been for larger office units of over 93 sq m (65%). Of the 5no. units of less than 93 sq m, four were located in the same building, Prospect House – a serviced office and co-working space for freelancers, remote workers and small businesses.
- 3.115 Despite there being a lower proportion of smaller units, this further demonstrates the market for serviced offices / co-working spaces in Royal Tunbridge Wells Town Centre.

Royal Tunbridge Wells Office Supply

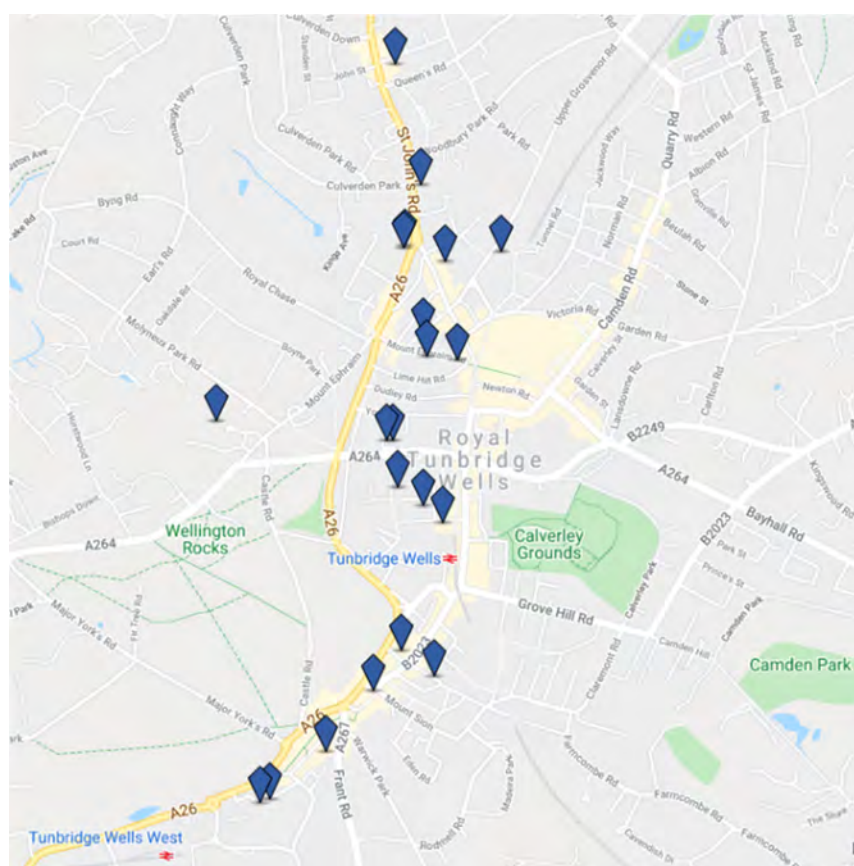
- 3.116 Table 3.21 shows the makeup of the office listings by size and Figure 3.22 shows the location of office spaces currently available to let in the town centre.
- 3.117 The units are dispersed across the town centre in a similar pattern to the lease transactions, with concentrations around the main commercial parades in the north and south of the town centre. Similarly, there are also some units available on secondary roads behind the main town centre infrastructure.
- 3.118 At the time of our search, there were 22no. listings which amounted to 2,534 sq m of office space.

Table 3.21 – Office Space to Let by Size

Size Range (sq m)	No. Let	Percentage
0 - 46	1	5%
46 - 93	8	40%
93 - 232	8	40%
232 - 465	3	15%

Source: CoStar, 2020.

Figure 3.22: Office Lease Availability within Royal Tunbridge Wells Town Centre



Source: CoStar, 2020.

- 3.119 We note there is a lower proportion of smaller units when compared to those which have leased, especially those up to 46 sq m. Accordingly, whilst the overall provision of existing office space can meet demand, the sizes of the available units are larger than what has previously let, with over half providing 93 sq m or above.
- 3.120 Figure 3.23 shows the location of existing co-working / hot-desking facilities in the town centre.
- 3.121 Specifically, the map shows the location of the following spaces:

- **Hot Desks Co-working Space** – co-working space with hot desks, fixed desks and private offices as well as meeting rooms for hire and refreshments.
- **The House** – flexible desk and event spaces for small businesses, freelancers and start-up companies. The space provides hot desks, fixed desks and meeting rooms.
- **Desk Frog** – hot-desking facility with a meeting room, kitchenette and F&B appliances. Desks are contracted on a weekly basis.
- **Office Tribe** – flexible and serviced co-working space including hot desks and small office rental

Figure 3.23 – Royal Tunbridge Wells Flexible Office Space



Source: Google MyMaps, 2020.

3.122 There are several other flexible or serviced office spaces in the town centre which are available on more formal contracts / tenancy agreements. For sales listings, our search identified only two office spaces up to 465 sq m, as summarised below:

- Castle Street, TN1 – 97 sq m
- Commercial Road, TN1 – 229 sq m

3.123 The units have been listed for 8 and 9 months respectively and are not shown as SSTC (having 'sold, subject to contract'). Based on previous transactions, the current volume of office space is sufficient to meet typical levels of demand. The units fall within the 93 - 232 sq m size bracket where historically there has been the highest level of sales demand.

Agent Consultation

3.124 In regards to office spaces in Royal Tunbridge Wells, agents noted the following:

- Agents noted that office requirements had moved away from large expanses of open floorspace to smaller more confined units in the town centre. This was attributed to the nature of businesses in Royal Tunbridge Wells, which were generally perceived to be smaller, locally-based SMEs with smaller employment bases of up to 20 people.
- Infrastructure and inaccessibility were identified as potential reasons for why large occupiers are unlikely to come to the town centre. One agent noted that people do not typically commute into the town centre by train. There is instead a reliance on cars which in turn leads to traffic congestion and parking issues.
- The popularity of smaller units was supported by agents, who also noted the recent emergence of co-working spaces and increased take-up in serviced offices. This was again justified by the volume of smaller, specialist businesses who are director-owned by residents in the surrounding areas.

Office Market Summary

- 3.125 The future outlook for office space is uncertain, with changing occupier needs which have resulted from the Covid-19 pandemic. Recent take-up has been low, with a general trend towards the benefits of flexible and serviced offices and co-working spaces.
- 3.126 Our review of the office market in Royal Tunbridge Wells has been undertaken at a fairly high-level, with specific regard for premises up to 465 sq m. Annual take up has been fairly consistent at c. 930 - 1,395 sq m of space leased and 185 - 465 sq m sold.

- 3.127 The distribution of spaces is less focussed on the main commercial parades and frontages, with a general proportion of office spaces located on secondary roads surrounding the town centre.
- 3.128 Current availability is sufficient to meet typical levels of demand, although the units listed to let are generally larger than those which have let during the past 5 years. At the time of our review, there were only two office spaces listed for sale, but the overall floorspace would be sufficient to meet typical sales demand (despite no reported activity in 2020 thus far).
- 3.129 It is noted that the data collected for both the supply and demand of office space in Royal Tunbridge Wells is unlikely to have included the existing co-working and flexible office spaces in the town centre. These premises are often agreed on more casual arrangements (i.e. hot desking / rent-a-desk) and shorter-term contracts without the need for a formal lease agreement.
- 3.130 As such, and with consideration for the types of business who occupy smaller office spaces in the town centre, demand may exist for flexible / co-working / serviced office spaces. However, this type of space is most-often delivered in existing office buildings rather than occupying purpose-built space. Whilst there may be opportunities to provide this type of space, it is unlikely that this demand will result in the delivery of new, standalone office blocks.
- 3.131 It is noted that the newly-introduced Use Class E 'Commercial, Business and Service' means that retail units can now be used for office purposes without the need for change of use. This flexibility means that requirement for office space could potentially be accommodated in high-street units. Whilst it is currently unclear what impact increasing flexibility in this way will have, it does indicate that there are greater options for office-based businesses in high-street locations.
- 3.132 Agents noted that the majority of businesses in the town centre are smaller SMEs and director-owned companies who do not have significant employment bases. This explains the popularity of smaller spaces and it was considered unlikely that a major occupier with significant space requirements would look to relocate to Royal Tunbridge Wells at this stage. This was also partly attributed to the existing infrastructure and the difficulty in getting in and out of the town centre. As a result, some respondents noted that requirements had shifted towards flexible offices and co-working spaces, emulating the likes of WeWork and Regus serviced spaces.

Cinema & Theatre

Cinema & Theatre Market Overview

- 3.133 The cinema market is highly concentrated, with the top three multiplex operators accounting for 68.5% of schemes in the UK (Vue, ODEON & Cineworld). Such operators have typically favoured out-of-town locations where larger units and cheaper rents have meant that cinemas can act as anchor tenants for larger leisure complexes.
- 3.134 Further, with typical floorspace requirements of 2,790 - 4,180 sq m, the contracted rent obligations for cinema operators are significant, making both the spatial and financial prospects of town centre sites unfeasible.¹⁶
- 3.135 However, as the commercial leisure market continues to be driven by the prioritisation of consumer experience, there has been a concurrent rise in smaller, boutique cinema operators such as Everyman, Curzon and Picturehouse. By contrast, these schemes can operate on significantly smaller floorplates (some as small as c. 745 sq m) and the prospect of occupying more central locations therefore becomes spatially and financially feasible.¹⁷
- 3.136 The market for theatres and performing arts venues is considerably more sheltered, with information notably scarcer when compared to conventional leisure facilities. As a result, the limited availability and quality of transactional evidence make for a restricted insight into how the sector operates and the typical requirements sought by operators. However, town centre locations are usually favoured, with size requirements in suburban centres influenced by the catchment population.
- 3.137 The emergence of both uses in town centres has meant that leisure concepts are becomingly increasingly common anchor tenants for retail districts and commercial promenades. This encourages consumers to combine activities in a single town centre trip (e.g. eating out before a cinema / theatre booking, food shopping after a workout/fitness class), leading to increased footfall, consumer spend and longer dwell times.¹⁸

¹⁶ Legal & General, 2018. *The Future of Leisure*.

¹⁷ Ibid.

¹⁸ Ibid.

- 3.138 Like the F&B sector, the lockdown measures imposed by Covid-19 had a significant impact on commercial leisure uses. With much of the sector unable to trade, there was an increase in brands facing financial difficulty, particularly as an industry which is service-led and less able to adapt to trading online.¹⁹
- 3.139 After a period of long speculation, the UK government confirmed that cinemas would be able to reopen from 4th July 2020, with theatres and performing arts venues following on 15th August; however, these were subject to subsequent lockdowns in December 2020. Even when permitted to open, uses remain subject to social-distancing measures and revised capacities which ultimately restricted the typical flow of consumer trade, preventing facilities operating at full capacity over 2020 as a result of constant changes in terms of lockdowns and restrictions.²⁰

Royal Tunbridge Wells Cinema & Theatre Demand

- 3.140 There have been no leases or sales of cinemas in Royal Tunbridge Wells Town Centre since January 2015 (ie. during the sample period). The former ABC cinema site in the town centre has remained derelict since 2001 and the closest active operator, ODEON, is located c. 2.5-miles north-west of the town centre in Knights Park Leisure Park (c. 28,000 sq ft unit with 9-screens).
- 3.141 The Assembly Hall Theatre has served Royal Tunbridge Wells Town Centre since it's opening in 1939. The 1,000-seat multi-purpose venue is owned, funded and managed by Tunbridge Wells Borough Council. TWBC announced in September 2020 that the theatre would be reopening at a reduced capacity on 17 October 2020 following a 7-month closure instigated by coronavirus, though this has subsequently closed again following the further lockdowns in December 2020.

Royal Tunbridge Wells Cinema & Theatre Supply

- 3.142 We understand that the consented mixed-use scheme at the former ABC Cinema site includes a c. 930 sqm, three-screen Everyman cinema. However, this site was sold to a new developer once planning consent had been granted; more recently this developer has also placed the site on the market, with a reported asking price of £17m.

¹⁹ Savills, 2020. *Retail and leisure insolvency activity*.

²⁰ Savills, 2020. *Spotlight: The initial impact of Covid-19 on the retail and leisure market*.

- 3.143 The previous owners of Royal Victoria Place had drawn up proposals for a £70m upgrade to the shopping centre which would have included a new cinema, however these plans were not pursued after the site was sold to British Land.²¹
- 3.144 In terms of theatre use, permission has been granted for a 1,200-seat theatre as part of the Calverley Square development. This application was submitted by the Council, and this theatre was intended to replace the Assembly Hall Theatre. Although this scheme gained planning permission, we understand that Full Council have since resolved to not pursue delivery of this scheme.

Agent Consultation

- 3.145 Agents were aware of the proposals to bring an Everyman cinema into the town centre at the former ABC site. It was considered that this could bring some demand for ancillary commercial uses such as those proposed (i.e. F&B, convenience retail) although the proposed floorspace was considered large, and there was concern that this space would be challenging to fill. No reference was made to the existing theatre or provision of a new venue.

Cinema & Theatre Summary

- 3.146 Cinema and theatre uses are currently highly influenced by social distancing measures. Whilst venues are beginning to reopen, capacities are significantly reduced and the overall user experience / services are not considered as attractive. Whilst these measures are not expected to remain in place in the longer term, the economic impact will be significant on these businesses and it may take some time for them to recover. This means that few of these businesses are currently looking to expand their operations and are not looking to new opportunities. That said, over the longer term it is expected that leisure and entertainment uses will continue to play a pivotal role in the vitality of town centres.
- 3.147 In recent years, there has been interest in town-centre locations from smaller arthouse-style cinema operators. The Everyman involvement in the former ABC Cinema site shows that this has also been the case in Royal Tunbridge Wells. We would note that a main challenge around delivering this type of scheme relates to viability. These operators typically require a capital contribution which can range from £1m-£3m and will look to limit their capital expenditure wherever possible. This can make it

²¹ The Times, 2019. *Royal Victoria Place facelift gets underway.*

difficult to deliver a viable scheme, and often delivery relies on the value associated with other uses when part of a mixed-use scheme.

- 3.148 Our review of the existing facilities in Royal Tunbridge Wells shows that both cinema and theatre uses are present in the town centre and the wider Borough, and are therefore likely sufficient to meet demand in the short term. However, there may be requirements for these uses in the medium to longer term.
- 3.149 Agents did note that the provision of a smaller boutique cinema in the town centre, such as that proposed on the former ABC Cinema site, may help encourage footfall and also lead to further ancillary town centre uses. This type of cinema is likely to perform well if it provides a different type of offering to the Odeon.
- 3.150 A new theatre is likely to perform well if delivered, and would be a positive replacement for the ageing Assembly Hall Theatre. However, it is likely that this would need to be delivered by the public sector, with little interest in this type of property from the private sector.

Health & Fitness

Health & Fitness Market Overview

- 3.151 Demand for health and fitness operations in the UK has increased significantly over the past decade, with a number of gym chains expanding across the country to service emerging fitness concepts. This rise has been attributed to a number of factors, including; greater levels of disposable income; public sector promotion of exercise and healthy living; increased variety and concepts in more accessible locations; the emergence of low-cost facilities with 24/7 access, and greater uptake of premium 'lifestyle' offers.²²
- 3.152 This trend of expansion has also been shared with smaller, boutique operators who offer specific services or types of training in more urban locations. Units of this nature can be a quarter to a tenth of the size of typical gym footprints, with premises of c. 185 sq m appearing on High Street locations.

²² Legal & General, 2018. *The Future of Leisure*.

This again supports the underlying prioritisation of experience in the commercial leisure sector, as consumers seek new and innovative lifestyle concepts which are convenient and accessible.

3.153 Like other service-led industries, the national lockdown brought restrictive measures to health & fitness facilities, forcing most to close indefinitely and impose membership freezes. Whilst some larger operators have been able to compensate by moving some classes and programmes online, the smaller facilities have faced difficulties.

Health & Fitness Supply

3.154 In terms of gyms & fitness centres, there have been a number of transactions (both lease & sale) during the past 5-years, as follows:

- **Unit 2, 103 Goods Station Road** – 211 sq m unit leased by Present Health in 2015, a yoga studio with injury rehabilitation and osteopathy facilities. The lease agreed a rent of £7.04 psf for an undisclosed term.
- **Market Square, Royal Victoria Place** – 1,663 sq m unit leased by PureGym in 2017 for a 7-year term. No rent information recorded.
- **Former Central Post Office, Post Office Square** – 1,138 sq m former health club (including studios, gym and spa facilities) sold in March 2019. Operations ceased in May 2019 and the unit has remained vacant since.
- **SPN Fit**, 179 sq m opened in 2018 at 40A Camden Road. No leasing information is available.
- **Natural Fit Health Club** – occupied 910 sq m at 73-75 Calverley Rd and opened in July 2020.
- **Oakley Fitness** – occupied the former Vale Road Methodist Church in 2020.

3.155 In total, more than 3,000 sq m of gym / fitness centre floorspace has transacted in Tunbridge Wells over the past 5-years across three separate units. This demonstrates that demand for fitness uses is less frequent, but the sizes requirements are greater when compared to conventional town-centre commercial uses.

3.156 It is anticipated that the comparatively low demand for health and fitness facilities is partly explained by the existing provision in the town centre and larger catchment areas of existing facilities further afield. There are several gyms and fitness facilities across the town centre, as well as Nuffield Health

centre in Knights Park Leisure Park which provides c. 3,020 sq m of fitness floorspace including a gym, swimming pool and spa facilities.

Health & Fitness Demand

- 3.157 The Former Central Post Office on Vale Road is currently listed as available for this use at rents of between c. £75 – £226 psm. No other commercial leisure facilities are currently advertised to let or for sale.

Agent Consultation

- 3.158 In regards to health & fitness facilities, agents consider the current town centre provision sufficient to satisfy demand.

Health and Fitness Summary

- 3.159 Like many other commercial leisure uses, the success of health and fitness facilities is currently influenced by social distancing measures. With subdued demand and capacity limits, occupiers may become increasingly reliant on the Coronavirus Act to help protect themselves financially over the longer term. However, it is anticipated that demand will return progressively as gym-goers are reassured by health and safety measures in facilities.
- 3.160 Health and fitness take-up is considerably less frequent than other commercial uses, with only six lease and sales transactions recorded in Royal Tunbridge Wells over the past 5 years. This does not include the Nuffield Health centre located north of the town centre which also provides a significant amount of H&F floorspace.
- 3.161 Agents considered the current fitness provision in the town centre to be sufficient and it was not expected that another major operator would want to take space following the arrival of PureGym in 2017. It is anticipated that there will be few opportunities to deliver health and fitness floorspace throughout the plan period.

Residential Market Overview

- 3.162 We go on to consider the residential market in Royal Tunbridge Wells, assessing current demand, supply and opportunities for residential development. We have considered the opportunity for

market housing, retirement living and Private Rented Sector (PRS) housing, focussing on the market for these types of housing in town-centre locations.

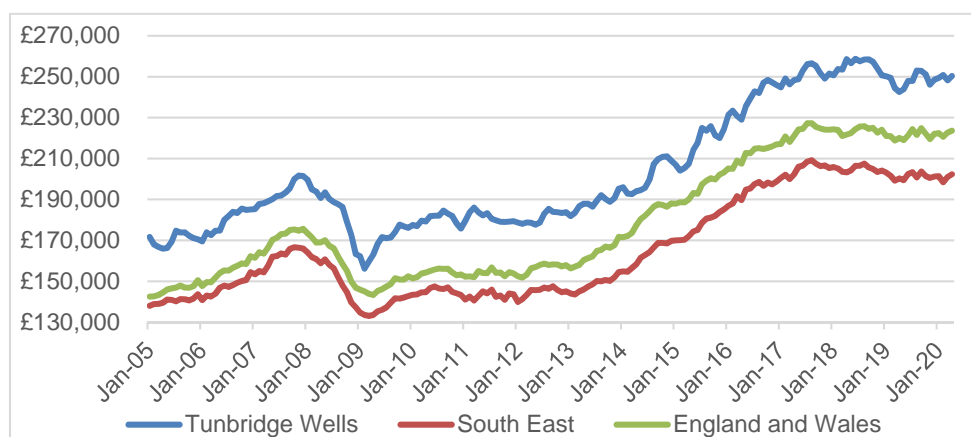
3.163 We have primarily focussed on the market for flatted development due to the nature of the site allocations in the town centre. However, we have briefly looked at the market for housing, as this provides context and some sites to the edge of the town centre may be suitable for houses. We firstly provide a market overview, then look into market housing. We have then considered the market for retirement living, before assessing the potential for PRS accommodation.

3.164 As well as taking into account current levels of supply and demand, we consider achieved values, asking prices and rents. This provides insight into the values associated with new development and gives some understanding of whether new development may be viable. We have also consulted agents active in the local area to understand their views on the market. This analysis will allow us to determine whether the allocations including residential use in the draft local plan are appropriate, viable, reflect market conditions and are deliverable within the plan period.

National & Regional Contexts

3.165 Following the Global Financial Crisis, national property markets stagnated for 3-4 years before beginning a strong period of growth. This continued until mid-2017 when values stagnated. Values have remained relatively stable until the present day. Figure 3.24 compares the average property prices (new and re-sales) for flats and maisonettes in England & Wales, South East, and Tunbridge Wells Borough.

Figure 3.24: Flatted Accommodation Property Prices



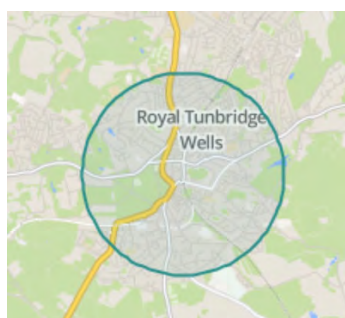
Source: Land Registry, 2020

- 3.166 All markets have maintained similar trend lines. Since January 2009 flat prices in Tunbridge Wells Borough have increased by 54.3%, which has slightly outperformed both the regional and national markets which have recorded increases of 50.2% and 53.2% respectively. The average sales value in Tunbridge Wells Borough is higher than that of the region and national markets. As of April 2020, the average flat sale value in Tunbridge Wells Borough was £250,365. The national average is less at £223,584 and the South East regional average is significantly less at £202,351.
- 3.167 Savills expect UK average houses price to fall by 7.5% in 2020, a rise of 5% in 2021, a rise of 8% in 2022 and then a rise of 5% and 4.5% in the following two years. This results in a net increase of 15% over the next 5 years.
- 3.168 Savills also anticipate that house prices will fall at a uniform rate across the UK. House prices will recover faster where there are more resilient job sectors such as professional and scientific & technology, where the impact will be relatively mild because many people will be able to work from home. As such, Savills believe that London and the south-east will lead the housing market recovery.
- 3.169 They also note that the risk of a “hard Brexit” towards the end of 2020 could also have a negative impact on the housing market.²³

Transaction Volumes

- 3.170 We have analysed recorded sales within a 1-mile radius of Royal Tunbridge Wells Train Station over the past 2 years. The area is shown in Figure 3.25. This analysis indicates how active the market is, giving an understanding of trends in take-up.

Figure 3.25: Royal Tunbridge Wells (1 Mile Radius)



Source: Rightmove, 2020

²³ Buy Association, 2020 – *New Savills data shows revised five-year predictions for UK housing market.*

3.171 Transaction volumes can be seen in Table 3.26

Table 3.26: Housing Transactions over the past 2 years

Property Type	September 2018 – 2019	September 2019 - 2020
Flat	287	129
Terraced	165	78
Semi-Detached	100	54
Detached	99	50
All Property Types	651	311

Source: Rightmove, 2020

3.172 There were over twice as many transactions between September 2018 - September 2019 than there were between September 2019 and September 2020. The drop in the number of transactions is likely to be due to Covid-19.

3.173 Flatted accommodation has had the highest amount of transactions in both years followed by terraced, semi-detached and then detached.

Housing Supply

3.174 The current number of units listed for sale within a 1-mile radius of Royal Tunbridge Wells Train Station is shown in Table 3.27.

Table 3.27: Currently Listed Stock in Royal Tunbridge Wells

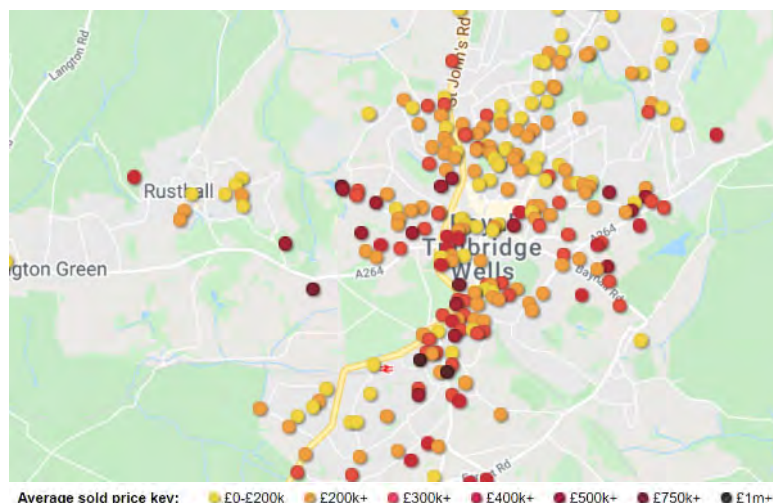
Property Type	Current Listings
Flat	331
Terraced	92
Semi-Detached	62
Detached	55
All Property Types	537

Source: Rightmove, 2020

3.175 The vast majority of current listings is flatted accommodation. 79no. of the 537no. listings are new build units and of those 79no. new build 64no. are flats.

Housing Transactions Location

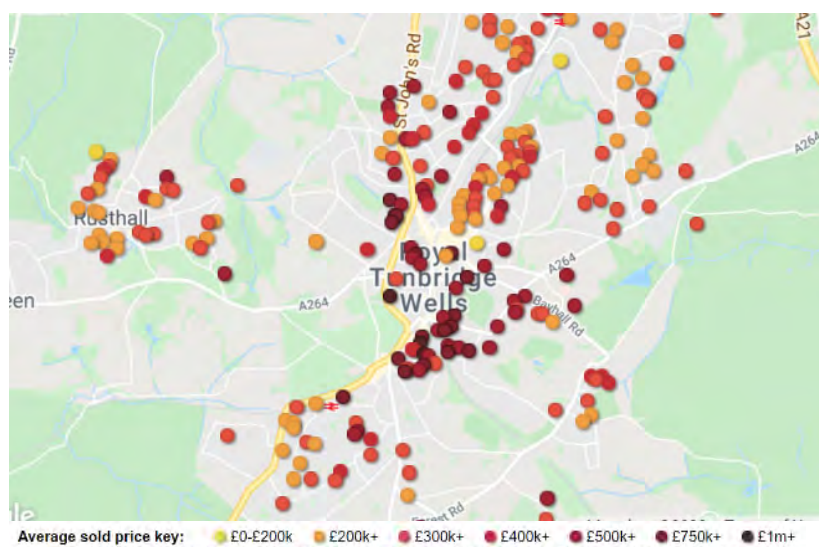
Figure 3.28: Flatted Housing Transaction Locations



Source: Rightmove, 2020

- 3.176 Figure 3.28 shows the locations of all flats sold within Royal Tunbridge Wells over the past 2 years. There is a significant amount of flatted accommodation transactions throughout the Town Centre of Royal Tunbridge Wells. The majority of transactions look to be for values lower than £500,000.

Figure 3.29: Terraced Housing Transaction Locations

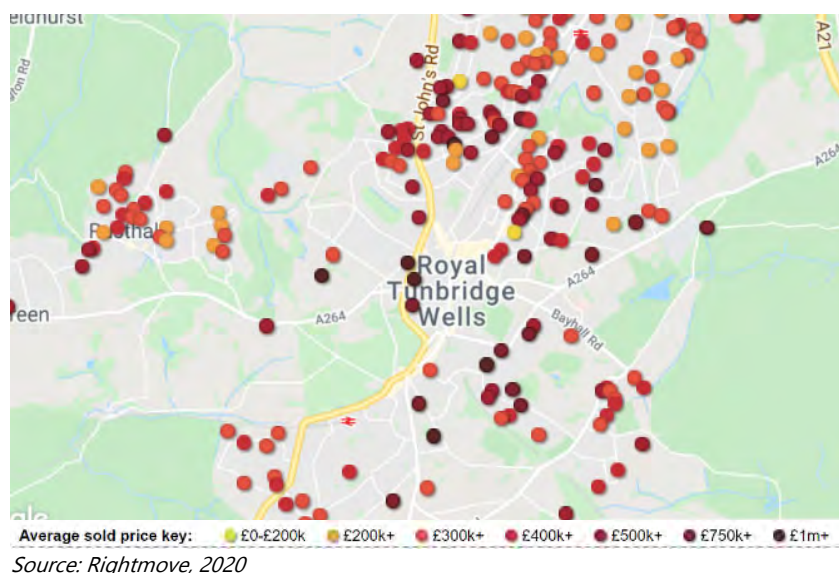


Source: Rightmove, 2020

- 3.177 Figure 3.29 shows the locations of all the terraced housing transactions. The main density of units is immediately surrounding the commercial centre of the town. There are several small concentrations

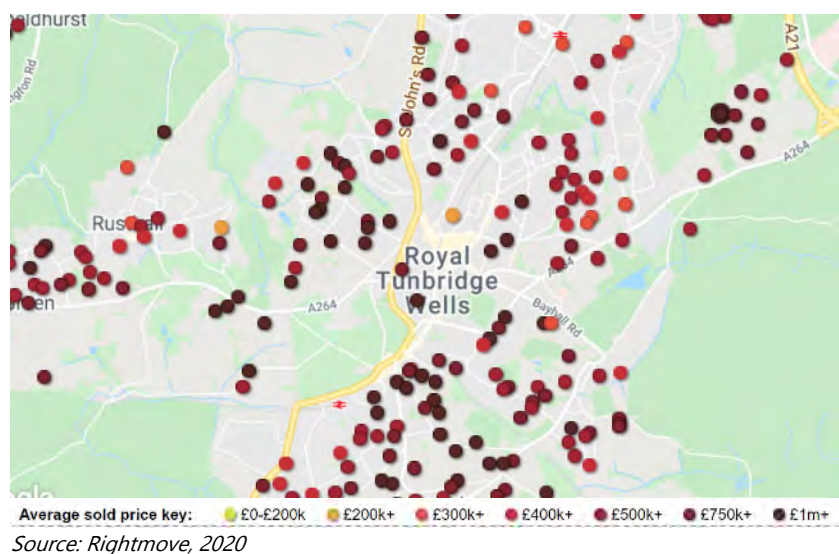
towards the outskirts of the town. The values of terraced housing in the Town Centre look to be between £750,000 and £1,000,000. Towards the outskirts, the values are lower, the majority between £300,000 and £500,000.

Figure 3.30: Semi Detached Housing Locations



3.178 Figure 3.30 shows the locations of all semi-detached housing transactions. They are generally focussed towards the outskirts of the town. They range from £200,000 - £1,000,000+.

Figure 3.31: Detached Housing Transaction Locations



3.179 Figure 3.31 shows all the locations of detached housing transactions. They are focused outside the town centre. The vast majority of the transactions are £750,000+.

Market Housing

- 3.180 We anticipate that flatted accommodation will make up the majority of the residential development coming forward. As such, we have analysed the flatted accommodation market first and in greater detail. We have followed up by analysing 2, 3 and 4-bed houses as there may be opportunities to bring forward some mews style housing on more edge of centre locations.

Sold Values – New Build Flats

- 3.181 To provide a detailed insight into the values achieved by new-build flats, we have studied individual transactions for new-build schemes. We have considered transactions in the town centre since August 2018.
- 3.182 Our search has identified 27no. new-build flats from the Royal Wells Park Scheme. The location of the scheme is shown below in Figure 3.32.

Figure 3.32: Royal Wells Park Location



Source: Google Maps, 2020

- 3.183 Royal Wells Park is a Berkeley Homes development and is located to the north-west of Royal Tunbridge Wells Town Centre. The flatted part of the scheme is made up of two blocks, Sapphire House and Emerald House.
- 3.184 Figure 3.33 shows an image of these blocks.

Figure 3.33: Emerald House and Sapphire House, Royal Wells Park



Source: Google Maps, 2020

- 3.185 Our search revealed 27no. transactions ranging from £350,000 to £1,180,000. Every apartment is now either sold or reserved.
- 3.186 The scheme features a collection of 1,2 and 3-bed apartments which range from 50 sq m (538 sq ft) to 173 sq m (1,862 sq ft). The 1-bed units are all 50 sq m (538 sq ft) and sold for between £332,500 and £355,000. This breaks back to a range of £6,650 - £7,100 psm (£618 - £660 psf). The 2-bed units range from £362,500 to £550,000 with unit sizes ranging from 61 sq m (657 sq ft) to 88 sq m (947 sq ft). The 3-bed units range from £735,000 to £1,180,000, the unit sizes range from 103 sq m (1,109 sq ft) to 179 sq m (1,927 sq ft).
- 3.187 There are a large variety of unit sizes and prices. However, the sizes are generally larger than the UK minimum space standards requirement. This suggests that people moving into the Royal Tunbridge Wells area would prefer larger more spacious flats.
- 3.188 There are very few other new-build transactions recorded in the town centre. Two sales were recorded at the Royal Springs scheme at 11 London Road, to the south of the town near the Pantiles. Here, a 2-bed unit of 75 sq m (807 sq ft) sold for £390,000 which breaks back to £5,200 psm (£483 psf) in May 2019. In June 2018, a 3-bed duplex of 154 sq m (1,668 sq ft) sold for £765,000 which breaks back to £4,968 psm (£458 psf).

New-Build Asking Prices - Flats

- 3.189 To substantiate the data obtained from completed transactions, we have reviewed the asking prices for properties currently listed for sale in Royal Tunbridge Wells. Please note that asking prices can often be aspirational and may not be an entirely accurate reflection of realistically achievable values.

Westcombe House, 2-4 Mount Ephraim, Tunbridge Wells, TN4 9TF

- 3.190 Westcombe House is located a short distance north of the town centre. The scheme is an office to residential conversion and comprises of 34no. 1 and 2-bed apartments. There is no access to private parking or private outside space. The 1-bed apartments are on the market for £290,000 and the 2-bed apartments are on the market for between £335,000 and £400,000. The 1-bed apartments are 49 sq m (527 sq ft) which results in a value of £5,920 psm (£550 psf). The £400,000 2-bed apartment is 71 sq m (764 sq ft) which breaks back to £5,630 psm (£523 psf). A picture of the scheme is shown in Figure 3.32

Figure 3.34: Westcombe House



Source: Westcombe House Development Brochure, 2020

Table 3.35: Westcombe House Asking Prices

Unit	Size (sq m)	Size (sq ft)	Price	Price psm (psf)
1-bed	56	603	£405,000	£7,232 (£671)
2-bed	90	974	£650,000	£7,222 (£667)
3-bed	147	1,580	£1,060,000	£7,211 (£670)

Source: Rightmove, 2020

1887 The Pantiles, Eridge House, 1 Linden Close, Tunbridge Wells, TN4 8HH

- 3.191 1887 The Pantiles is a luxury scheme by Dandara Developments comprising of 127no. 1,2 and 3-

bed apartments shown in Figure 3.36. The scheme has access to a 24-hour concierge service. The 1-bed units range from £299,950 - £405,000. The 2-bed apartments range from £499,000 - £715,000 and the only 3-bed apartment left is on the market for £1,060,000. This is the first of 3 phases.

Figure 3.36: 1887 Pantiles, Dandara Development



Source: Dandara Development Brochure, 2020

The Pantiles Garden Rooms, Linden Gardens, Linden Park Road, TN2 5QL

3.192 The Pantiles Gardens Rooms is a Regenerate Land Development which is estimated to complete in Q4 2020. It is located 0.7 miles away from the train station. The scheme comprises of 5no. 2-bed apartments and 4no. 3-bed apartments. The 2-bed flats range from 74 sq m (797 sq ft) to 79 sq m (850 sq ft) which breaks back to £6,082 psm (£565 psf) and £5,942 psm (£552 psf). The 3-bed flats are 92 sq m (992 sq ft) which breaks back to £5,802 sq m (£539 sq ft). The 3-bed penthouse is 125 sq m (1,345 sq ft) which hasn't been released to market yet. The agents marketing the scheme reported that one flat was reserved off-plan. They are confident that the scheme will sell well. Every apartment has access to either a private balcony or terrace. A picture of the scheme is shown in Figure 3.37.

Figure 3.37: The Pantiles Gardens Rooms



Source: The Pantiles Garden Rooms Brochure

Calverley House, Calverley Road, TN1 2TU

- 3.193 The Calverley House Development compromises of 85no. Studio, 1-bed and 2-bed apartments. The scheme is shown in Figure 3.38. The scheme is located immediately to the south-east of Royal Victoria Place Shopping Centre.

Figure 3.38: Calverley House Development



- 3.194 Calverley House is an office conversion scheme. The site is currently being marketed with a 15% discount for early sales. Here, a studio unit of 38 sq m (414 sq ft) is listed for £182,750 (£4,809 psm / £441 psf). A 1-bed unit of 52 sq m (564 sq ft) is listed for £276,250 (£5,313 psm / £490 psf). A 2-bed unit of 70 sq m (755 sq ft) is available for £382,500 (£5,464 psm / £507 psf). These prices all reflect the 15% discount.

Carlton Road Development

- 3.195 The Carlton Road Development compromises of 10no. 2-bed and 3-bed apartments shown in Figure 3.39. The scheme is located approximately 1 mile east of the High Street.

Figure 3.39: Carlton Road Development



- 3.196 Carlton Road is a new build conversion scheme with 2-bed prices ranging from £450,000 - £622,000. This scheme has been finished to a very high standard. All flats have access to a private balcony or terrace.
- 3.197 The 2-bed unit which is 809 sq ft is listed for £450,000. This breaks back to £556 psf. The 2-bed unit which is listed for £622,000 is 1,073 sq ft and breaks back to £579 psf.

New-Build Asking Prices - Housing

- 3.198 We have reviewed asking prices for new-build housing in the area, close to the town centre. Given town-centre sites are typically not suited to housing, there are understandably few examples of new houses in the centre. We have analysed this market because we believe there may be opportunities for infill mews style development in more peripheral town centre locations.
- 3.199 These are located at Tunnel Road, at the north of the centre. These are part of Brookworth Homes Goods Station Road scheme. An image of this small row of terraced housing is shown in Figure 3.40.

Figure 3.40: Goods Station Road Scheme



Source: Rightmove, 2020.

- 3.200 Table 3.41 shows the prices range for units of the Goods Station Scheme.

Table 3.41: Goods Station Road Asking Prices

Unit	Size (sq m)	Size sq ft	Sales Price	Price psm (ps)
3-bed terrace	86	924	£490,000	£5,698 (£530)
3-bed terrace	104	1,124	£570,000	£5,481 (£507)
4-bed end of terrace	133	1,436	£685,000	£5,150 (£477)

Source: Rightmove, 2020

Agent Consultation – Market Housing

3.201 We have undertaken telephone consultations with local agents to gain an understanding of current demand, requirement and opportunities in the market. Below, we summarise the main responses and comments.

- Agents confirmed that there is a significant amount of flatted residential units currently being built out and in the pipeline within Royal Tunbridge Wells and the surrounding area. One agent reported that they had stopped pitching to sell flats because the market was saturated. Other agents were more bullish about the market and said that flatted developments would sell.
- Agents indicate that having private outside space and parking is essential.
- Agents reported that the main demographic was predominantly downsizers. However, it is also reported that there has recently been a lot of interest from 25 - 45-year-olds who had moved to London but are originally from the area. They are looking to move from London as they no longer expect to be required to work from offices 5 days a week.
- Royal Tunbridge Wells and the surrounding area is known for its good grammar schools. People have been moving into the area to be within the catchment areas.
- Being close to the train station is an advantage because it provides a direct service to Charing Cross in circa 50 minutes.
- The most popular residential units overall are 3-4 bedroom detached houses with gardens.
- Values range significantly depending on specification and location.
- Agents report that there is a strong private rental market. There has been increased interest from buy to let investors because residential units in Royal Tunbridge Wells are now generally achieving higher yields than London. It was also noted that buy to let investors are slightly wary of the London market due to the uncertainties created by the Covid-19 pandemic.
- No specific areas were recommended for residential development as agents see reasonable demand across the town-centre area.

Market Housing Summary

3.202 The housing market in Royal Tunbridge Wells is very active. The town is seen as a desirable place to live with a large net inflow of people moving into the area. Although we do not know the full extent of the implications caused by Covid-19 there are some positive early signs for the residential market. Agents reported that there are signs that people are moving out of London out to Royal Tunbridge

Wells as people are no longer expected to be in the office 5 days a week. This means that peripheral towns on the outskirts of London such as Royal Tunbridge Wells could be set to benefit from the pandemic.

- 3.203 It was reported by agents that the flatted accommodation market is currently saturated. However, there will be more opportunity in the medium term. Demand for 2,3 and 4 bedroom houses is very strong.
- 3.204 The new-build housing stock tends to be of a high quality and have larger than average unit sizes. Values can vary significantly depending on the size, location and specification of the scheme. Values in Royal Tunbridge Wells are relatively strong and so far have proven to be resilient.
- 3.205 There is a large number of residential units coming forward to the market and in the pipeline which suggests that residential development in Royal Tunbridge Wells will be viable.
- 3.206 In our opinion, there will be a significant opportunity for residential development in the medium to long term, with increasing demand and strong sales values making schemes viable.

Retirement Living

- 3.207 The retirement living sector has proven to be resilient throughout recessions due to sound longer-term fundamentals. Due to Covid-19, Care homes have suffered a short-term impact with move-in and occupancy levels. This is expected to last until a vaccine is rolled out on a large scale over 2021. The UK has an ageing population and as such the retirement living sector is expected to grow exponentially in the coming years. JLL²⁴ report that by 2025, 20% of the UK population will be over 65 years old. Over 65s own a combined £800 billion of housing equity.

Achieved Values

- 3.208 We have analysed transactions for retirement living accommodation in Royal Tunbridge Wells. Our search revealed 44no. transactions from a McCarthy and Stone development called The Dairy shown in Figure 3.42.

²⁴ JLL, 2020 – *Retirement Living - Where is the opportunity*

Figure 3.42: The Dairy Retirement Living Scheme, TN4 9FJ



Source: McCarthy and Stone Website, 2020

3.209 The Dairy is a large retirement living scheme which comprises of 1-bed and 2-bed units. Sales values range from £258,458 to £544,950. This is located approximately 1-mile north of Royal Tunbridge Wells train station.

Agent Consultation

3.210 We have undertaken telephone consultations with local agents to gain an understanding of current demand, requirement and opportunities in the market. Below, we summarise the main responses and comments.

- The marketing manager from the Dairy reported that the south-facing flats with private outside space sold very well. They are struggling to sell a couple of the north-facing units which don't have access to private outside space.
- McCarthy and Stone do not currently have any further requirement in Royal Tunbridge Wells. However, they wouldn't rule it out in the future.
- Agents were generally positive about the outlook for retirement living schemes in Royal Tunbridge Wells. They expect there to be continued demand in the area into the medium term.
- The consensus from agents was that there is opportunity in the town for another retirement living scheme.

Retirement Living Market Summary

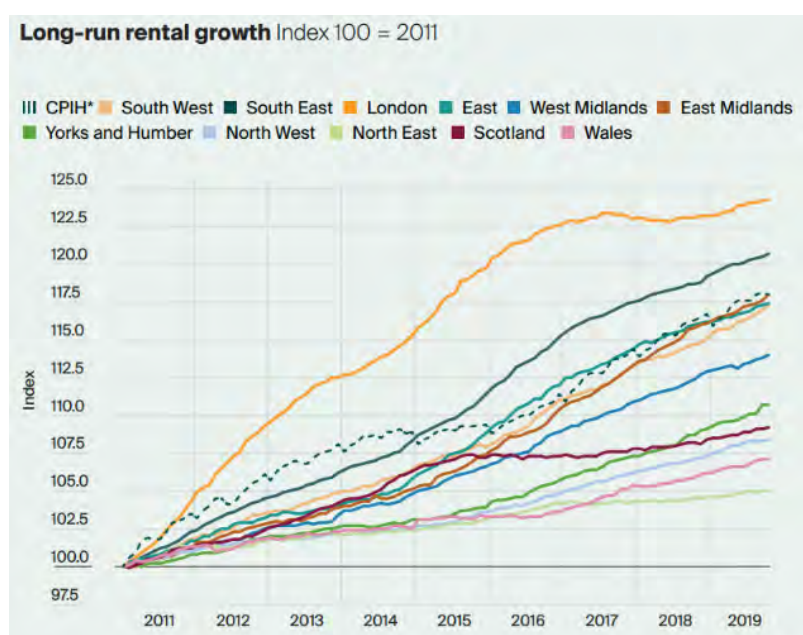
3.211 It is likely that there will be opportunities for retirement living development throughout the plan period. Owing to an ageing population and reasonable values, we anticipate that allocations involving this type of residential use would be delivered. It was reported that residential sales in the area are dominated by people downsizing, which suggests that people are retiring to the area.

- 3.212 It is unclear that any area of the town is particularly stronger than another, with agents considering there to be demand throughout the area. This suggests that any town-centre allocation is likely to perform well.

Private Rented Sector

- 3.213 Private rented accommodation is residential property owned by a landlord and leased to a tenant. The private rented sector accounts approximately 4.5 million homes in the UK, with the market doubling in size since 2002 and it is now the second-largest housing tenure.
- 3.214 Figure 3.43 shows long-run rental growth for each region in the UK from 2011 – 2020.

Figure 3.43: Rental Growth in the UK



Source: Knight Frank Research. *Consumer price inflation including housing costs.

- 3.215 There is a national growth trend which has been accelerating since 2013. House prices have continued to increase which have made owning a property more inaccessible for many people forcing them into private rental accommodation. The greater number of people that look to rent homes the higher rental values will be pushed.
- 3.216 The Resolution Foundation reports that 33% of people will likely be renting into retirement, so the longer-term fundamentals for the private rented sector look robust. Two of the main drivers are rising

house prices and declining access to social rentals. Knight Frank estimates that residential rental values are going to increase by 13% in the South East by 2024.²⁵




Available Rental Units

3.217 There are currently 85no. units to let within a 1-mile radius of Royal Tunbridge Wells station. This comprises of 67no. flats and 18no. houses. Table 3.44 shows a range of the flats currently available on the market.

Table 3.44: Currently Listed Rental Accommodation

Address	Monthly Rent	No. of Beds	Comment	Picture
Lime Hill Road, Tunbridge Wells	£750	1	Located 0.2 miles north of the Train Station. Finished to a good standard. No access to private outside space.	
Goods Station Road	£850	1	30 sq m (318 sq ft) flat, located 0.5 miles north of the Train Station. Finished to a high standard.	
Lonsdale Gardens, Tunbridge Wells	£760	1	Unfurnished 1-Bed flat located 0.1 miles west of the Train Station. The flat is finished to a high quality.	
Grove Hill Road, Tunbridge Wells	£1,400	2	68 sq m (729 sq ft) flat with a private roof terrace and balcony. There is access to secure gated parking. Fitted out to a high specification. Located 0.1 miles away from Tunbridge Wells Train Station.	
Royal Wells Court, Tunbridge Wells	£1,550	2	Access to private parking and a communal garden. The flat is finished a good standard. Located 0.2 miles north-west of the Train Station.	

²⁵ Knight Frank (2020) – Five-year UK residential rental market forecasts.

Address	Monthly Rent	No. of Beds	Comment	Picture
Exchange Mews, Culverden Park	£1,100	2	Unfurnished flat located 0.6 miles north of Tunbridge Wells Train Station. The flat is finished to a good standard.	
Beulah Road, Tunbridge Wells	£1,200	2	74 sq m (795 sq ft) flat finished to a high standard, access to a private outside terrace. Located 0.6 miles northeast of the Train Station.	
Medway Road, Tunbridge Wells	£950	2	Access to private car parking. Looks to be finished to a high standard. Located 0.8 miles north of Tunbridge Wells Train Station.	

Source: Rightmove, 2020

3.218 The data in Table 3.44 shows that rental values are relatively consistent for 1-bed units and 2-bed units. 1-bed units range from £750 - £850 per month and 2-bed units range from £1,200- £1,550 per month.

Agent Consultation

3.219 We have undertaken telephone consultations with local agents to gain an understanding of current demand, requirement and opportunities in the market. Below, we summarise the main responses and comments.

- Being close to the Train Station is an advantage because it provides a direct service to Charing Cross in circa 50 minutes.
- Agents reported that there is a strong private rental market. There has been increased interest from buy to let investors because residential units in Royal Tunbridge Wells are now generally achieving higher yields than London. It was also noted that buy to let investors are slightly wary of the London market due to the uncertainties created by the Covid-19 pandemic.
- No specific areas were recommended for private sector residential development.

Private Rental Sector Market Summary

- 3.220 There is a strong private rental market in Royal Tunbridge Wells. This suggests that there could be an opportunity for PRS housing in this location. Agents suggest that this type of scheme could perform well.
- 3.221 However, these schemes are typically delivered by institutional investors who are only recently starting to look at locations beyond the major cities. This suggests that there may be an opportunity to deliver this type of scheme in the mid to longer-term, but it may not be a viable short-term option.

Market Review Summary

- 3.222 Our review finds that the market is stronger in Royal Tunbridge Wells for some uses over others. The residential market is active, with reasonable values and a number of new developments both coming to the market and in the pipeline. There are signs that the market is becoming saturated but this is likely to have a short-term impact, with opportunities to deliver new housing in central locations throughout the plan period.
- 3.223 The retail market is more challenging. This is not only due to Coronavirus, with the market showing weakness before the pandemic. The hardest-hit area of the market is shopping centre units and high-street multiples. There are likely to be few opportunities for delivery of units which would favour this type of retail. The sorts of traditional high-street shops suitable for smaller independent businesses are more resilient, shown by units closer to the Pantiles which still see some demand. That said, existing stock is currently meeting demand, so although there may be some opportunity for new retail, this is not likely to be significant and may involve the replacement of existing stock.
- 3.224 The food and beverage market is similar to retail, with many operators consolidating operations even before the pandemic. Existing stock is currently meeting demand and the introduction of the flexible E use class is likely to allow for easier conversion of vacant retail use for this purpose where required. It is unlikely that there will be opportunities to deliver new space, although there is likely to be demand for this use alongside a cinema if this is delivered.
- 3.225 There has previously been known demand for cinema use, although it should be acknowledged that this use has faced significant challenges in the past year and few businesses are currently looking to

expand. With theatre use, it is likely that the public sector would need to take a leading role in the delivery of this use.

- 3.226 In general, available office stock (sub 465 sq m / 5,000 sq ft) meets the needs of businesses in the area, and there is limited demand for larger offices. There is an active market for smaller local businesses, but there are currently numerous options available to these business and little demand which is not being met. This indicates that there will be few opportunities to deliver significant amounts of new space in the town centre.
- 3.227 Our research indicates a reasonable provision of health & fitness space in Royal Tunbridge Wells and agents suggest that the current supply of property is sufficient to meet demand. However, should demand arise, this use can also now be accommodated within the E use class and repurposed vacant retail floorspace could likely meet this demand.

4.0 Consultation and Engagement

Introduction

4.1 As part of the commission, and building on the analysis of retail trends in Tunbridge Wells Borough, a series of consultation and engagement exercises were carried out. The exercises were designed to allow the consultant team the opportunity to hear from a wider range of stakeholders, as well as members of the public. Each method was selected to engage a specific group of people. The findings of the exercises have set the scene for the remainder of the Study, as well as forming a key consideration in the recommendations. The three main consultation elements included:

- i) Targeted stakeholder workshops for each town centre;
- ii) Public survey relating specifically to Royal Tunbridge Wells Town Centre;
- iii) School student survey relating specifically to Royal Tunbridge Wells Town Centre.

4.2 Each method is described below in detail, and the findings summarised.

Targeted Stakeholder Workshops

4.3 Targeted stakeholder workshops were carried out, arranged via video link. Invited stakeholders generally included business representatives and the Town or Parish Council. One meeting was arranged specific to each of the main town centres:

- Royal Tunbridge Wells Town Centre;
- Paddock Wood;
- Cranbrook; and
- Southborough.

4.4 Businesses representatives from Hawkhurst were also invited to participate but did not respond to email invitations. One additional meeting was also arranged for organisations that have oversight of the whole Borough or were regional based.

4.5 The participants were sent an agenda prior to the meeting which included a series of talking points including the following:

- Introduction;
- Overall health of the Town Centre (vitality and viability);
- Any local events in town attracting people to visit;
- View on the evening economy and opening hours;
- Understanding of the public's likes and dislikes;
- Vacancies (distribution and turnover of occupiers);
- Composition and mix of stores;
- Parking availability and costs;
- Quality of the street environment;
- Crime and security;
- Barriers to entry;
- Recommendations for alterations to the Town Centre boundary and development sites.

4.6 The insight that the stakeholders provided was valuable, and has informed the town centre health check exercise. A summary of the discussions that were had with key stakeholders is contained within the health check assessment for each centre.

Public Survey of Royal Tunbridge Wells

4.7 An online questionnaire was made available to residents that asked questions relating to their experiences within Royal Tunbridge Wells Town Centre. The survey was proposed as an alternative to the originally planned walk and talk tours that were deemed inappropriate due to the current ongoing Covid-19 pandemic and associated restrictions.

4.8 The survey was advertised on the Council's website and promoted via social media. It was available online using the platform Survey Monkey from 2 October 2020 to 11 October 2020. Hard copy version of the questionnaire was also made available at the Royal Tunbridge Wells Town Hall. In total, 935 responses were received. A copy of the questionnaire is attached at **Appendix B**.

4.9 The questionnaire asked 12 questions:

- Questions 1-5 focussed the respondent's experiences of the town centre and what would encourage them to visit the town centre more often.

- Questions 6-10 were designed to replicate the conversations that might have taken place during the walk and talk tours. These questions were place specific.
- Finally, question 11 asked if there was another local town that respondent's preferred to visit and why, and questions 12 gave the respondent the opportunity to set out any further comments.

4.10 The questions are set out below:

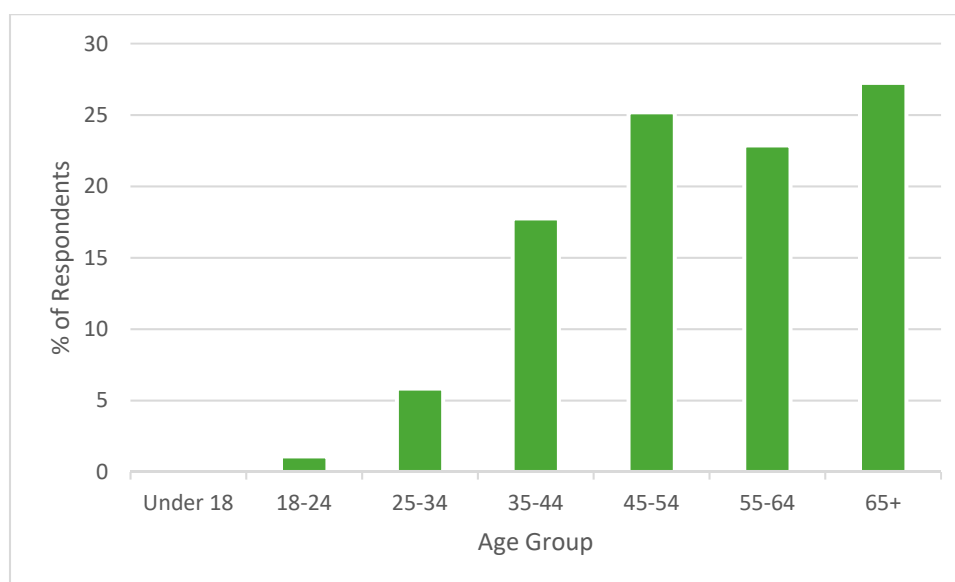
- i) For what reasons do you currently visit Royal Tunbridge Wells Town Centre?*
- ii) What do you like about Royal Tunbridge Wells Town Centre?*
- iii) Does anything put you off visiting the town centre? If so, what could be done to change this?*
- iv) Thinking about the range of shops, services and facilities currently offered within the Town Centre, is there anything you feel is missing that would encourage you to come to the town centre more often?*
- v) Are there any events or attractions that would encourage you to visit the town centre more often?*
- vi) Are there any specific areas of the town which you feel are particularly successful? In your opinion, why?*
- vii) Thinking about the area north of Calverley Road (including Royal Victoria Place Shopping Centre), what sort of development or growth would you like to see in this area in the future?*
- viii) Thinking about the area between Crescent Road and Calverley Road, what sort of development or growth would you like to see in this area in the future?*
- ix) Thinking about the area around Mount Pleasant Road and Royal Tunbridge Wells Station, what sort of development or growth would you like to see in this area in the future?*
- x) Thinking about the area around The Pantiles and High Street, what sort of development or growth would you like to see around this area in the future?*
- xi) Is there another town centre that you prefer to visit? What do you like about that centre?*
- xii) Do you have any other comments?*

4.11 Respondents were given the opportunity to identify which age bracket they belonged in. Of the 935 responses received, 822 provided a response.

4.12 The collated responses are provided at Figure 4.1.

- 4.13 The analysis shows that the majority of respondents were over the age of 45, with less responses received from those aged 44 and under. No responses were received from the age bracket under 18, and only 9 responses were received from those aged 18-24.

Figure 4.1: Age Breakdown of Survey Respondents



- 4.14 The section following provides a breakdown of the responses received for each question asked in the questionnaire.

Q1. For what reasons do you currently visit Royal Tunbridge Wells Town Centre?

- 4.15 By far the most popular response to Question 1 was that respondents visited Royal Tunbridge Wells Town Centre to visit shops within the centre. In total, 'shopping' was mentioned 726 times. The next most popular responses were 'eating out' or 'visiting restaurants' (326 mentions), and entertainment purposes, including visiting bars and pubs, socialising and general leisure activities (188 responses).
- 4.16 Included in Figure 4.2, is a complete list of all responses that were mentioned more than ten times.

Figure 4.2: Reasons given for visiting Royal Tunbridge Wells Town Centre

Response	No. of mentions
Retail	625
Food and drink (including cafes and restaurants)	319
Proximity	88
Banking	87

Response	No. of mentions
Theatre	77
Work	76
Social	69
Does not visit	57
Leisure	47
Groceries	39
Green space (including parks, fields and flowers)	38
Travel	38
Library	33
Entertainment	30
Bars, clubs & pubs	28
Exercise	28
Hair dressers	28
Opticians	28
Retail – clothes	24
Essential retail	23
Health	23
Dentist	19
Education	19
Appointment	14
Pantiles	12
Post office	12
Culture	11
Live music (including events at venues and Jazz)	11
Retail – beauty	11
Gym	10

Q2. What do you like about Royal Tunbridge Wells Town Centre?

- 4.17 Responses for Question 2 were broader than for Question 1. The most popular responses related to retailing and services including that there is a good variety of shops (149 mentions), the high quality of shops available (75), and the amount of independent stores (65).
- 4.18 Respondents also stated that they specifically liked The Pantiles area of the town (96), and the pedestrian areas within the centre (80), while the quality of the built environment (including layout, design, and architecture) received 73 mentions.
- 4.19 On a more negative trajectory, a further 254 comments were made relating to respondents finding very little or nothing to like about how the centre currently functions.

4.20 Included in Figure 4.3, is a breakdown of responses to Question 2. Those included are the responses that were mentioned by respondents on more than ten occasions.

Figure 4.3: Responses to what respondents like about Royal Tunbridge Wells Town Centre

Response	No. of mentions
Variety of shops	149
Little	143
Nothing	101
Pantiles	96
Pedestrian area	80
High Street	75
Quality shops	75
Built environment (including layout, design, architecture)	73
Accessibility	69
Green spaces	69
Independent shops	65
Quality dining	62
Attractiveness	47
History & heritage	44
Proximity	42
Atmosphere	39
Royal Victoria Place	36
Cafes/coffee shops	35
Cleanliness	33
Flowers/trees in street	30
Parking	26
Convenience	23
Open spaces	23
Compact	19
The Common	19
Chain stores	18
Trinity	18
Calverley Park	17
Entertainment	17
Camden Road	16
Character	15
Distinct areas	14
Not too busy	14
Theatre (general, unspecified)	14
Precinct	13
Department Store	12

Response	No. of mentions
Transport links	12
Friendly	10
Outdoor music	10
Safe	10

Q3. Does anything put you off visiting the town centre? If so, what could be done to change this?

- 4.21 When asked what put people off from visiting the town centre, reasons relating to retail were often cited including the number of currently vacant shops (311), lack of shops in general (143), and that people would like more variety in the types of shops on offer (82). Issues around the accessibility of the centre was also regularly referenced throughout the responses. In terms of parking people found it to be too expensive (251) and also that there was generally a lack of availability (117).
- 4.22 The appearance of the town centre was also noted as being negative in terms of some areas looking tired and run down (100) and it appearing 'depressing' (44) and dirty (22). The old cinema site is considered to harm the appearance of the town centre (62).

Figure 4.4: Responses to what discourages respondents from visiting Royal Tunbridge Wells Town Centre

Response	No. of mentions
Vacant shops	311
Car park expense	251
Lack of shops (general)	143
Traffic	121
Car park availability	117
Tired Looking/run down	100
Lack of variety (shops)	82
Old cinema site	62
Street scape (including paving, curbs and signage)	60
Lack of interesting shops	45
Depressing	44
No comment/problem	44
Royal Victoria Place	37
Lack of chain shops	33
Access (pedestrian)	31
Distance between shops	31
Anti-Social Behaviour	29

Response	No. of mentions
Vehicular Access limited	28
Dirty	22
Lack of facilities/amenities	22
Roadworks/layout	18
Safety/security	18
Youth gatherings	17
Car park machines/payment method	15
Covid restrictions	15
Lack of cycle routes	14
Public transport	13
Lack of greenery	11
Litter	10
Lack of dining	10
Maintenance	10
Smoking areas	10

Q4. Thinking about the range of shops, services and facilities currently offered within the Town Centre, is there anything you feel is missing that would encourage you to come to the town centre more often?

- 4.23 In terms of what would encourage people in the town centre with regards to retail, the most popular response was a wider range of clothing shops (195). People would also like to see independent shops encouraged (157), as well as more High Street shops. Suggestions included Zara, Primark and H&M (137). The need for more shops (131), a better variety of shops (96) and better quality shops (39) were also mentioned. Other suggestions included markets (farmers/street food) (64), more speciality shops (including florists, cheese shops, fishmongers) (48), a supermarket (32), department store (22), pop-up shops (12) and a hardware shop (10).
- 4.24 When thinking about leisure activities in Royal Tunbridge Wells, 127 respondents indicated that they would like to see a cinema back in the centre. People commented on the need for leisure activities in general (including sports, art and cultural facilities) (118). The desire for more dining opportunities was mentioned 65 times. Figure 4.5 provides a breakdown of the most common responses received.

Figure 4.5: Responses received regarding shops, services or facilities that are considered to be missing from the Town Centre

Response	No. of mentions
More clothing shops	195
Independent/unique shops	157
High Street shops	137
More shops	131
Cinema	127
Leisure (including sports, art and cultural facilities)	118
Variety of shops	96
More dining	65
Markets	64
Nothing	55
Cheaper/free parking	54
Cultural Events (including live music and productions)	43
Theatre	36
Speciality shops (including florists, cheese shops, fishmongers)	34
Youth opportunities	34
More parking	32
Supermarket	32
Street scape improvements	32
Social spaces	29
Greenery (including parks, planting, trees)	26
Accessibility	25
Better retail/shops	25
Outdoor seating	23
Department store	22
Aesthetic	20
Public transport improvements	20
Road/traffic improvements	20
Old Cinema site development	18
Cheaper rent/Council tax	16
Unspecified	16
Atmosphere	15
Evening entertainment enhancement	14
Grocers/small food suppliers	14
Luxury brands	14
Connectivity	13
Pop-up shops	12
Hardware shop	10

Q5. Are there any events or attractions that would encourage you to visit the town centre more often?

- 4.25 The addition of markets was most often requested (185) and in particular a Christmas Market (21). Other retail elements that would encourage more visits to the town centre included pop up shops (18), and more shops in general (14).
- 4.26 Many suggestions were received in terms of leisure events, and were broken down into events and facilities. Events focussed around the following; Live music performances (148), cultural events (87), festivals (including food and music) (80), open air events (unspecified) (33), events held in the Pantiles (29).
- 4.27 The provision of the following facilities were mentioned; theatre (including street theatre) (80), new cinema (77), an art facility (including craft stalls) (48), leisure facilities which includes a leisure centre (18), provision of a performance space (16), an ice-skating rink (15) and a swimming pool (11).
- 4.28 Figure 4.6 provides a breakdown of the most common responses received. Responses that were mentioned on ten occasions or more are included.

Figure 4.6: Responses received regarding shops, services or facilities that are considered to be missing from the Town Centre

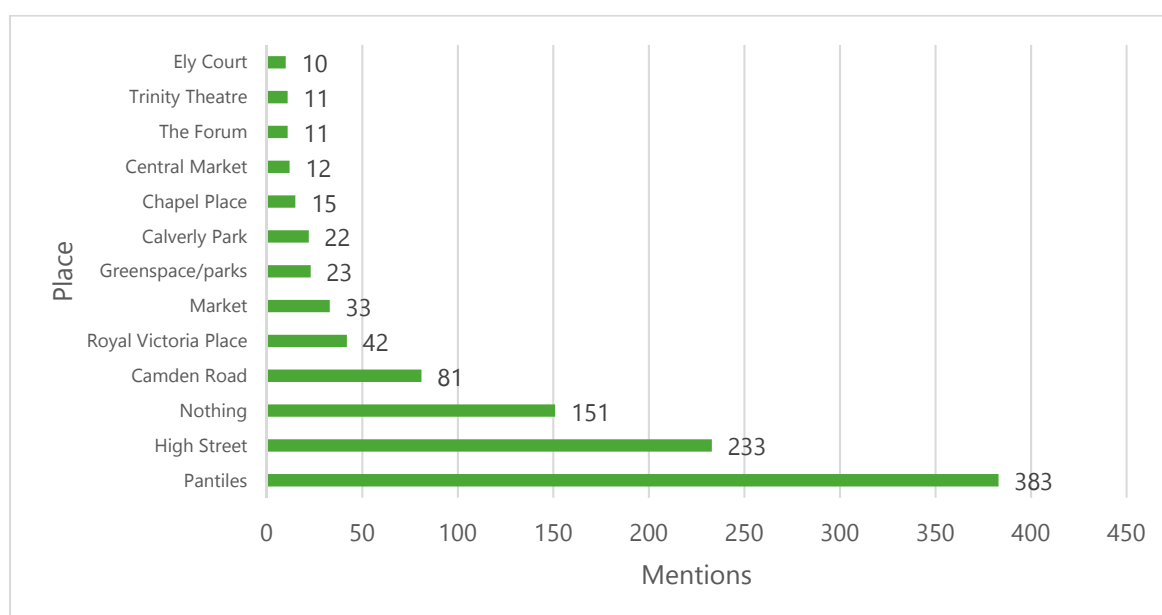
Response	No. of mentions
Nothing	198
Markets	185
Live music	148
Cultural Events	87
Festivals (including food and music)	80
Theatre (including street theatre)	80
Cinema	77
Art facility (including craft stalls)	48
Open air events	33
Unspecified	31
Pantile events	29
Children activities (including parks)	24
Christmas market	21
Cheaper/free parking	21
Leisure facilities (including leisure centre)	18
Pop up shops	18

Performance place	16
Ice-skating	15
More shops	14
Youth opportunities	12
Swimming Pool	11
Greenery (including parks, tree, flowers)	10
Street Food (including outdoor dining)	10
Steetscape (including lighting and water features)	10

Q6. Are there any specific areas of the town which you feel are particularly successful? In your opinion, why?

- 4.29 Responses for the specific areas that were cited as being most successful are set out in Figure 4.7. Responses that were referenced ten or more times are included below.

Figure 4.7 | Specific areas within the town centre referenced as being 'successful'



- 4.30 In terms of the reasons that the places above were mentioned, the most common responses were that the area had 'atmosphere' (121), the 'food & drink places' (114), 'independent shops' (93), and 'variety of shops and eateries' (61).
- 4.31 These responses indicate that local residents, visitors and users of the town centre place a high value on these areas. Responses that received ten or more mentions are included in Figure 4.8.

Figure 4.8: Reasons for referencing specific areas within the town centre as being ‘successful’

Response	No. of mentions
Atmosphere	121
Food & drink places (inc cafes, restaurants, bars and pubs)	114
Independent Shops	93
Variety of shops/eateries	61
Attractiveness	50
Live Music	50
Pedestrian Area	48
Interesting	36
Leisure	33
Shopping (general)	30
History & heritage	28
Built Environment (including architecture and layout)	20
Outdoor seating	19
Well maintained	17
Parking available	13
Sense of Community	10

Q7. Thinking about the area north of Calverley Road (including Royal Victoria Place Shopping Centre), what sort of development or growth would you like to see in this area in the future?

- 4.32 Concerning the retail offer in this area, the comments received included; that the vacancy levels should be reduced (125), a market would be beneficial (88), and that independent shops should be encouraged (80). In terms of leisure provision, 70 respondents specifically suggested that they would like to see a cinema in this area.
- 4.33 Figure 4.9 provides a breakdown of the most common responses received. Responses that were mentioned on 20 occasions or more are included.

Figure 4.9: Responses received regarding shops, services or facilities that are considered to be missing from the Town Centre

Response	No. of mentions
Vacancy level to be dealt with	125
Market(s) wanted	88
Independent shops encourage	80
Cinema	70
More shops wanted	53
Better choice of restaurants/cafes	48
Better quality shops wanted	46
Outside eating area required	42

Response	No. of mentions
More pedestrian areas wanted	37
Stage for entertainers wanted	37
Street Food wanted	37
Better shopping centre layout	36
No development needed	34
Green space needed	34
Outdoor seating wanted	34
Residential uses wanted	26
Reduce business rates	24
Leisure activities (general) wanted	22
Primark wanted	21
Teenage leisure facilities wanted	20

Q8. Thinking about the area between Crescent Road and Calverley Road, what sort of development or growth would you like to see in this area in the future?

- 4.34 It was stated by 58 respondents that they felt that the area between Crescent Road and Calverley Road currently performs well and a further 47 respondents thought that no further development is needed.
- 4.35 Of those that did believe that improvements could be implemented, 107 respondents identified that more independent shops should be encouraged. Pedestrianisation of some or all of the area was suggested by 90 respondents. With regards to leisure, a better choice of restaurants/cafes was also commonly referenced (60).
- 4.36 Figure 4.10 provides a breakdown of the most common responses received. Responses that were mentioned on 20 occasions or more are included.

Figure 4.10: Responses received regarding options for growth or development within the area between Crescent Road and Calverley Road

Response	No. of mentions
Independent shops wanted	107
More pedestrian areas wanted	90
Better choice of restaurants/cafes	60
The area performs well	58
No development needed	47
Less driving restrictions in place	41
Vacancy level to be dealt with	33
Make more attractive	31

Response	No. of mentions
More variety of shops wanted	31
Outside eating areas wanted	29
Buildings to be maintained	28
Planting needed	23
Retain character	21
Residential uses wanted	20

Q9. Thinking about the area around Mount Pleasant Road and Tunbridge Wells Station, what sort of development or growth would you like to see in this area in the future?

- 4.37 By far the most common comment made in response to this question was that the old cinema site needs to be redeveloped (250). Furthermore, 74 respondents suggested that the area could be turned into a green space. In terms of leisure provision, a better choice of restaurants/cafes was suggested by 63 respondents, including with the option of outdoor dining (20). Both a cinema (51) and theatre (12) were requested, as well as more leisure activities in general (11).
- 4.38 There is a wish for a link between the top and bottom of the centre, with respondents making suggestions for a tram, shuttle bus or chair lift (50).
- 4.39 Figure 4.11 provides a breakdown of the most common responses received. Responses that were mentioned on 20 occasions or more are included.

Figure 4.11: Responses received regarding options for growth or development within the area around Mount Pleasant Road and Tunbridge Wells Station

Response	No. of mentions
Old cinema site	250
Old cinema site turned into green space/park	74
Better choice of restaurants/cafes	63
Cinema	51
Link needed to join the town (tram/bus/etc)	50
The area performs well	46
No development needed	33
Better parking wanted	28
Residential uses needed	24
Make more attractive	23
Planting needed	21
Outdoor eating area wanted	20
Taxi parking at the station improved	20

Q10. Thinking about the area around The Pantiles and High Street, what sort of development or growth would you like to see around this area in the future?

- 4.40 In response to the specific questions about the area around The Pantiles and the High Street, it was stated by 124 respondents that they felt this area currently performs well. A further 87 respondents thought that no further development is needed.
- 4.41 More public events to be encouraged in this area was cited by 91 respondents, as well as the provision of outdoor dining (54), and a better choice of restaurants/cafes (27). Provision of a market was also suggested on 37 occasions.
- 4.42 Figure 4.12 provides a breakdown of the most common responses received. Responses that were mentioned on 20 occasions or more are included.

Figure 4.12: Responses received regarding options for growth or development within the area around The Pantiles and High Street

Response	No. of mentions
The area performs well	124
Public events to be encouraged	91
No development needed	87
Resolve traffic issues	85
More pedestrian areas	82
Independent shops encouraged	67
Better parking needed	56
Outdoor eating areas wanted	54
More variety of shops wanted	47
Dislike new residential development in Pantiles	42
Market (s) wanted	37
Attract tourism	35
Retain character	35
Reduce business rates	33
Better choice of restaurants/cafes	27
Wider pavements	21
Make more attractive	20

Q11. Is there another town centre that you prefer to visit? What do you like about that centre?

- 4.43 Respondents were given the opportunity to identify whether there was a town centre nearby that they preferred to visit over Royal Tunbridge Wells. The most common response was 'none' which was

the response for 259 respondents. The most popular towns included Maidstone (94), Tonbridge (87) and Sevenoaks (56).

Figure 4.13: Responses received regarding preferred town

Response	No. of mentions
None (no preference to TW)	259
Maidstone	94
Tonbridge	87
Sevenoaks	56
Blue Water	46
Lewes	32
Brighton	30
Tenterdon	25
Hastings	23
Crowborough	20

- 4.44 In terms of what it was that respondents liked about those centres, the most common responses were 'variety of shops' (129), 'atmosphere' (71) and 'better shops' (71). These responses were broadly aligned with the reasons given for particular areas within the town centre being most successful as detailed for Question 6. This suggests that these are some of the principles that are perceived as being most important to a successful town centre.
- 4.45 Figure 4.14 provides a breakdown of the most common responses received. Responses that were mentioned on 10 occasions or more are included.

Figure 4.14: Responses received regarding reasons for visiting preferred town over Royal Tunbridge Wells

Response	No. of mentions
Variety of shops/restaurants	129
Atmosphere/character	71
Better shops (including open shops)	71
Better parking (including ease, price and availability)	57
Leisure	43
Independent shops	42
Accessibility (better access)	40
Food and drink offer	36
Attractive	31
Supermarkets	23
Pedestrian areas	19
History & heritage	14
Well maintained	11

Response	No. of mentions
Greenery	10

Q12. Do you have any other comments?

- 4.46 In total, 612 respondents left a final comment. For the most part these comments were repetitive of the comments that have been previously made, however of the new comments included referencing that Tunbridge Wells is 'dying' (47), and also making unfavourable comments about Tunbridge Wells Borough Council (27).

School Student Survey

- 4.47 A questionnaire was designed specifically for secondary school students attending schools in the Tunbridge Wells Borough. The questionnaire was made available via Survey Monkey for a two-week period 5 October 2012 to 18 October 2020. A copy of the questionnaire is attached at **Appendix C**.
- 4.48 The following schools responded to invitations to participate:
- Skinners' Academy, Royal Tunbridge Wells;
 - Cranbrook School, Cranbrook;
 - Kent College, Pembury; and
 - Mascalls Academy, Paddock Wood.
- 4.49 A total of 15 responses were received, the majority being from year 10 and 11 students.
- 4.50 The questionnaire included the following questions:
- What is your favourite thing about Royal Tunbridge Wells Town Centre?
 - In your opinion, does the town centre have enough things to do for young people your age?
 - If you could add one thing to the town centre that would make you want to go there more often, what would it be?
 - Is there anything else you want to tell us about your experiences in Royal Tunbridge Wells Town Centre?
- 4.51 In response to Question 1, which was multi-choice, nine of the 15 respondents stated that their favourite thing about Royal Tunbridge Wells Town Centre was that there are 'Good places to eat and

drink'. Four respondents stated that they liked 'The range of shops', and two respondents stated that 'Sometimes there are events'. These responses indicate that senior school students prioritise food and beverage options of traditional shopping as the main purpose of visiting the town centre.

4.52 Question 2 was specifically aimed at identifying whether senior school aged students thought that the town centre has enough things aimed at young people. All 15 of the students that responded answered 'no'.

4.53 Question 3 asked for some suggestions for things that might encourage young people to visit the town centre more often. The most common responses included 'more shops and restaurants' and specific suggestions included Primark, Bershka, Tommy Hilfiger and Nandos. Other leisure suggestions included a cinema, swimming pool and a theme park.

Summary and Conclusion

4.54 The three methods of consultation that have been engaged have provided us with a valuable opportunity to gain insight into the views of the people that use the Borough's centres. In particular, the survey of users of Royal Tunbridge Wells Town Centre has provided a substantive data set, with more than 900 individuals providing a response.

4.55 The key findings of the two surveys, the general public survey and the school survey, are summarised as follows:

- Notwithstanding the general downward trend of traditional bricks and mortar retailing, the most common reason for visiting the town centre is still for 'shopping';
- There is a general perception that Royal Tunbridge Wells Town Centre is failing to keep up with the changing nature of retailing, whilst specific retailers who are not currently represented in the town were identified as aspirations;
- The old cinema site remains a key concern for local residents;
- The High Street and The Pantiles are generally perceived to be the most pleasant and well performing area of the town centre, while the areas in the northern portion of the centre were generally considered to be less successful;

- When asked what shops, services or facilities were missing from the Town Centre, the focus was on shops, with the most common responses relating to the quantum and type of shop that were felt to be missing;
- When asked what would encourage more trips to Royal Tunbridge Wells Town Centre, the most common responses related to arts, culture and leisure uses such as cinema, theatre, cultural events, markets and live music, indicating that there is perhaps a gap in the market;
- School aged children are generally underwhelmed by the offer of Royal Tunbridge Wells Town Centre and feel that there is not enough of an offer aimed specifically at younger age groups.

4.56 It is important that these findings are kept at the forefront of this Study as we move towards undertaking an assessment of the health of Royal Tunbridge Wells Town Centre, as well as the assessment of floorspace capacity. The findings of the targeted stakeholder workshops are included within the Chapter 5: Town Centre Health Check Assessments.

5.0 Town Centre Health Check Assessments

- 5.1 This chapter of the report sets out our health check assessment to assess the vitality and viability of Royal Tunbridge Wells Primary Regional Town Centre, as well as Cranbrook, Paddock Wood and Southborough Town Centres, and Hawkhurst Rural Service Centre, presented across pro-forma templates.
- 5.2 The extent of our assessments of the centres have been determined by the extent of Experian Goad Plans (where available), in order to provide consistency and allow for comparison against national averages and the findings of the previous 2017 Study.

Methodology

- 5.3 This town centre assessment builds on the consultant teams' analysis of market trends as outlined in Chapter 3. We supplement this analysis with two sources of new empirical evidence; consultation and stakeholder engagement, and our town centre health checks. By combining the findings of our engagement with local groups, residents and businesses, and our on-the-ground observations, we are able to build a picture of the current health of the centres, based on performance against the range of health check indicators set out in the NPPF / PPG.
- 5.4 We describe our methodology for the health check exercise below, before going on to examine each of the Borough's key Town and Rural Service Centres. We utilise the categorisations employed by Experian. These are mostly commonplace, but for the avoidance of doubt, 'Retail Services' include the likes of dry cleaners, health & beauty, opticians and travel agents, whilst 'Leisure Services' include bars, cafes, fast-food, nightclubs and cinemas.
- 5.5 Nexus carried out the town centre health check survey exercise in August 2020, which were completed after the resumption of trading for retail stores following the initial Covid-19 'lockdown', though prior to the resumption of trading for the hospitality industry. In light of the rapidly changing circumstances affecting both retail and leisure providers during the course of 2020, we later on in this report recommend a 'light touch' refresh of this exercise in 2021.
- 5.6 Health checks are both a physical exercise in walking the town centres to understand their make-up, constraints, and opportunities, as well as an exercise in understanding the views of local stakeholders

(as described in Chapter 4).

5.7 While the NPPF does not provide a precise list of criteria to be used to assess the health of a centre, the Government's 'Town Centres and Retail' National Planning Practice Guidance (NPPG) of March 2014, updated in July 2019, offers a helpful set of indicators. The NPPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time:

- **Diversity of Uses** | Data on the diversity of uses in Tunbridge Wells Borough's centres was collated during the health check completed by Nexus in June 2020. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** | Vacant properties were also identified during the 2020 health check. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some churn is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor. At this specific time, the Council should also be wary of the post-Covid-19 implications of town centre openings, with some businesses either not yet able to re-open, or holding off re-opening.
- **Commercial Yields on Non-Domestic Property** | Whilst this can be an indicator of town centre performance over time, data on commercial yields for Tunbridge Wells' centres is not publically available at this time, as it is now only produced by ONS for major cities. Commercial rents (as considered in detail in Chapter 3: Property Market Trends and Review) provide a suitable alternative indication of the relative attractiveness of the area.
- **Customers' Views and Behaviour** | Information on customers' views is based on the results of a series of consultation and engagement exercises include targeted stakeholder workshops, an online public survey, and school student surveys. These results provide an indication of how a centre is both used and viewed by local residents, businesses and visitors.
- **Retailer Representation and Intentions to Change Representation** | Information on the current strength of centres and retailer representation have been derived from Experian Goad Category Reports and other published sources.

- **Commercial Rents** | An examination of average prime rents to facilitate an understanding of shopping rents and investment yields, as previously reviewed.
- **Pedestrian Flows** | General footfall and pedestrian flows were observed by Nexus during site visits to the Borough's key Town and Rural Service Centres. Nexus, AspinallVerdi and Durlings were able to obtain a comprehensive understanding of pedestrian flows through observation at varying times. It should be noted that our site visits were during the Covid-19 pandemic, and so we would recommend resurveying relevant centres as part of any follow-up town centre work in order to understand the degree of change and how future plans will interact with the ongoing recovery.
- **Accessibility** | Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities. The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means including pedestrians, cyclists and disabled people.
- **Perceptions of Safety and Occurrence of Crime** | General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data.
- **State of Town Centre Environmental Quality** | Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus' site visits to the centres.
- **Balance between independent and multiple stores** | Consideration of the balance of retailer representation was informed by Nexus' site visits to the centres, as well as Goad mapping.
- **Extent to which there is evidence of barriers to new businesses opening and existing businesses expanding** | Attention was given to the length of unit vacancies as per Goad Reports, as well as the size of units available to let, and insights provided through engagement with relevant stakeholders operating businesses within the centres.
- **Opening Hours / Availability / Extent to which there is an evening and night time economy offer** | General understanding of the night time economy was informed by Nexus' site visits to the centres, stakeholder engagement, and a review of various local businesses' opening hours online. Again, this aspect is complicated by the Covid-19 implications of town centre openings. We have made judgments where relevant.

5.8 Experian Goad plans, updated by Nexus Planning, are provided at **Appendix F**. Goad plans are defined by Experian, and whilst they are broadly in line with Town Centre boundaries shown on Proposals Maps, they are not always identical.

Royal Tunbridge Wells

Description	<p>Royal Tunbridge Wells is the primary retail and leisure destination in the Borough of Tunbridge Wells, providing a range of services and amenities that are not widely available to the smaller settlements.</p> <p>The centre is broadly linear in nature, anchored by the Royal Victoria Place Shopping Centre and the pedestrianised Calverley Road to the north, and The Pantiles parade of retailers and facilities to the south, with a number of town centre facilities including Council offices and a train station located along the central retail parade of Mount Pleasant Road.</p>
Status	Royal Tunbridge Wells is classed as a 'Primary Regional Centre' within the Tunbridge Wells Core Strategy (2010).



Figure 5.1: Tunbridge Wells Station



Figure 5.2: Mount Pleasant / Monson Road Junction

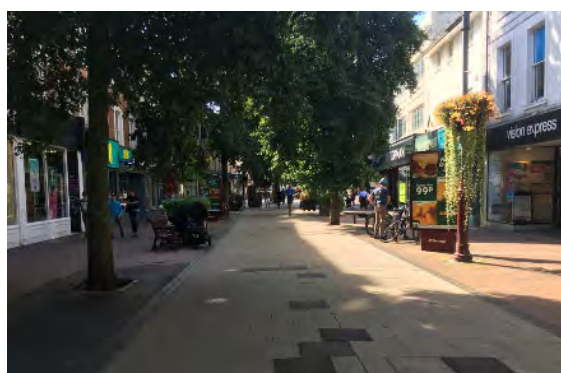


Figure 5.3: Calverley Road



Figure 5.4 South of Mount Pleasant Road

Table 5.5 provides an overview of the Main Urban Area's composition at the time of the site visits in August 2020, compared to the UK averages (2020) and the Nexus town centre survey in 2016.

Table 5.5: Royal Tunbridge Wells Town Centre Composition

Categories	Tunbridge Wells (August 2020)			UK Average (June 2020)		Tunbridge Wells (2016)	
	Units (#)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)
Convenience	44	6.6	6.0	8.3	15.3	5.9	5.0
Comparison	232	34.6	47.6	29.1	33.4	47.9	57.5
Retail Services	95	14.2	6.4	16.2	7.1	9.7	5.2
Leisure Services	123	18.4	16.4	24.7	25.7	11.8	9.1
Financial & Business Services	60	9.0	8.1	8.7	7.3	7.3	6.3
Miscellaneous	0	0.0	0.0	0.0	0.0	0.9	0.4
Vacant	116	17.3	15.4	12.0	10.7	16.5	16.5
Total	670	100.0	100.0	100.0	100.0	100.0	100.0

Source: Nexus Planning 2020, Experian Goad 2020 & 2017 Study

Overall Composition	<p>Royal Tunbridge Wells is the largest centre in the Borough comprising 670 units. The centre has a good mix of uses with similar proportions of convenience, comparison, retail, financial and business services to UK averages.</p> <p>Independent and national multiples are both prominent within the centre, with notable national multiples including Boots, Oxfam, Next, Topshop and Gap. The centre has a relatively high proportion of vacant units compared to the national average, which has increased by 0.8 percentage points since the 2016 town centre survey.</p> <p>The town is linear in structure with a fairly steep topography that has defined the growth of the centre, primarily located along Mount Pleasant Road. Royal Tunbridge Wells train station is located within the middle of the centre, which also features a number of large car parks.</p>
Convenience	<p>The centre has seen a slight increase of 0.7 percentage points in convenience stores (6.6%) compared to 2016 (5.9%). Despite the increase, the centre still has a lower than average proportion of convenience units compared to the UK average of 8.3%. The centre also has a lower proportion of convenience floorspace (6.0%) compared to the UK average of 15.3%.</p> <p>Qualitatively, the centre has a wide range of convenience units including butchers, bakers, delicatessens and health food shops. A majority of these units are independent stores; however, the centre also features major retailers in Sainsbury's Local, Marks and Spencer Foodhall, Tesco Metro and Iceland.</p>

Comparison	<p>Comparison units account for a majority of the stores within Royal Tunbridge Wells, with 232 units (34.6%). Despite the centre having a higher proportion of units compared to the UK average (29.1%), the centre has seen a significant decrease in the number of comparison retailers since 2016, when they accounted for 47.9% of the centre.</p> <p>The proportion of comparison floorspace in the centre is 47.6%, which is a reduction of 9.9 percentage points from 2016. Nonetheless, comparison floorspace still make up a considerable proportion of the town centre compared to the UK average of 33.4%.</p> <p>The centre features a range of different comparison units, including charity shops, ladies and men's wear, bridal wear, art galleries, furniture shops, jewellers and sports goods. Whilst the centre does include a good range and mix of independent retailers and national multiples, it is notable that the independent retailers appeared to be focused towards the Pantiles and High Street; whereas, the national multiple retailers were located towards the north of the centre at Royal Victoria Place Shopping Centre.</p>
Services	<p>The services (retail, leisure, financial and business services) have all seen an increase in high street presence since 2016 and account for 41.6% of units within the centre, compared to 28.8% in 2016. The combined level of 'service' floorspace has also increased from 20.6% in 2016 to 30.9% in 2020.</p> <p>Retail service units have seen an increase of 4.5 percentage points to 14.2%, whilst comprising just 6.4% of the floorspace within the centre. Both the percentage of units and floorspace are below the UK average, which stands at 16.2% (units) and 7.1% (floorspace). A high proportion of the retail services provide 'Health and Beauty' services, which account for 69.5% of all the retail service providers in the centre.</p> <p>Leisure service units have seen an increase of 6.6 percentage points to 18.4%, compared to 11.8% of units in 2016. Despite the rise in leisure services, the centre still features a lower proportion of leisure units compared to the UK average of 24.7%. The leisure services currently present in the centre are predominantly cafes, restaurants, take away and public houses.</p> <p>Financial and business services account for 9.0% of the centre's units and 8.1% of the floorspace. This is similar to the UK average of 8.7% of units and 7.3% floorspace. The centre's offer includes a wide range of banking options, as well as a notable number of estate agents, which specifically account for 46.7% of the financial and business services.</p>
Vacancies	<p>At the time of the site visits in August 2020, there were 116 vacant units (17.3%), a higher proportion than the UK average (12.0%), though the centre</p>

	<p>was still under some hospitality-based restrictions due to Covid-19 and some caution should be applied until the longer term impacts of Covid-19 on general shopping patterns are known.</p> <p>The centre has seen a small increase in vacant units since 2016, where at the time of the site visit there were 109 vacant units (16.5%). This relatively minor increase in units is particularly notable as the proportion of vacant floorspace has fallen by 0.9 percentage points from 16.5% in 2016 to 15.4%.</p> <p>This suggests that larger units that have previously struggled have begun to attract new uses and occupiers, whilst smaller units have become available. Notably a number of the vacant units are located to the north of the centre, in and around the Royal Victoria Place Shopping Centre.</p>
Pedestrian Flows	<p>During the site visits high pedestrian flows were observed throughout the centre, particularly given the recent lockdowns and ongoing social distancing.</p> <p>A number of 'hot spots' were identified within the Pantiles, Royal Victoria Place and Tunbridge Wells Station.</p>
Accessibility	<p>Royal Tunbridge Wells' Train Station is located in the centre of the town, along Mount Pleasant Road and offers direct services to London and Hastings, via Sevenoaks and Tonbridge. The station is served by Southeastern Trains.</p> <p>There are 15 short and long term car parks located in the centre, all of which operate as paid facilities:</p> <ul style="list-style-type: none"> • Great Hall - 199 spaces; • John Street - 64 spaces; • Linden Park Road - 54 spaces; • Meadow Road - 440 spaces; • Royal Victoria Place - Levels 1-8 - 1,244 spaces; • Torrington - 243 spaces; and • Upper Pantiles - 170 spaces; • Beech Street - 38 spaces; • Camden Road - 65 spaces; • Crescent Road - 1,085 spaces; • Little Mount Sion - 18 spaces; • Mount Pleasant Avenue - 80 spaces; • Royal Victoria Place - Levels 8a and above; • The Old Coach Park - 39 spaces; and • Town Hall Yard - 100 spaces. <p>Sainsbury's car park, offers free parking for 730 cars and is within walking distance of the centres' southern boundary. However, parking is restricted to customers only which (along with the challenging topography) restricts the potential for significant linked trips with stores in The Pantiles.</p>

Perception of Safety	<p>The centre was relatively busy at the time of the site visits, providing significant natural surveillance across the centre.</p> <p>The perception of crime across Royal Tunbridge Wells was low when the site visits were carried out.</p>
Opening Hours	<p>Royal Tunbridge Wells features a number of leisure services such as restaurants, pubs and bars, but they are not prominent throughout the centre with a lower proportion of leisure services than the UK averages.</p> <p>The Pantiles and The Royal Victoria Place feature a number of leisure services, resulting in later opening hours and focussed areas of evening economy within these areas.</p>
Environmental Quality	<p>Nexus observed a relatively high level of environmental quality across the centre. Street furniture was prominent including bins, planters, hanging baskets, street lighting, benches and bus stops. The centre was well maintained, clean and featured little street litter, though vegetation was fairly modest and traffic congestion was notable at the main entrances and exits.</p> <p>The Pantiles to the south of the centre is full of character, with historic and attractive shop frontages. The pedestrianised street is both cobbled and paved, and features tables and chairs for outdoor dining, which add to the character of the area. The street also features a number of trees and vegetation.</p> <p>The High Street also features attractive shopfronts; however, the street lacks street furniture or vegetation. Mount Pleasant Road is steep, with wide pavements and lined by mature and high quality trees. The street also features a number of bus stops and is demarcated by on street car parking.</p> <p>Calverley Road is also pedestrianised and features street furniture such as telephone boxes, bollards, planters and benches. Mature trees also line the centre of the street.</p>
Barriers to Entry	<p>Barriers to entry include high rental rates, a perceived lack of commercial space and high vacancy rates, as summarised through stakeholder engagement events.</p>
Stakeholder Engagement	<p>On Monday 21 September, Nexus undertook a meeting with representatives of Royal Tunbridge Wells Together, Royal Victoria Place and the Royal Tunbridge Wells Town Forum. A further meeting was also held on Wednesday 23 September with representatives of Kent Federation of Small Businesses, Locate in Kent and Tunbridge Wells Community Safety Manager. The</p>

following thoughts and views were shared in relation to the health of the town centre.

- The centre is relatively healthy with a good mix of units featuring a range of independent and chains. It was noted that the centre has more units than Bluewater; however, they are spread over a larger area, as a result the centre feels disjointed.
- Royal Tunbridge Wells does not have a healthy evening economy, which is being impacted by the Covid-19 restrictions, particularly the wet businesses such as pubs and bars.
- The environmental quality of the centre could be improved through introducing further vegetation including planters and hanging baskets, as well as more bins and street furniture.
- As a result of Covid-19 the centre has been doing relatively well as people are staying local. There is an opportunity to change the way the centre operates post Covid-19 and encourage people to work and live in the centre rather than travelling to areas such as London, through the introduction of more 'hot desking areas'.
- It was identified that commercial businesses and offices should be protected within the centre, particularly in light of Covid-19. Other barriers to entry include high business rates, which particularly impact independent businesses.
- The centre could benefit from encouraging sustainable transport within the centre, particularly cycling.
- Issues within the centre included high parking costs that operate long hours, which are driving customers away from the centre, as well as local perceptions of crime.
- Successful events within the centre include festivals such as Jazz on the Pantiles and Christmas Markets, which suggested demand for more food, drinks and street food events.

Key Issues

- High environmental quality featuring historic and attractive shopfronts, vegetation and street furniture including benches, bins, bollards and street lighting.
- Traffic congestion was notable when entering the town centre from the north and south.
- The centre is linear in nature with a steep topography from the south to the north. As a result of the topography, it is unlikely for shoppers to link trips through the centre.
- The centre has a higher proportion of vacant units (17.3%) compared to the UK average (12.0%).
- Evening economy is disjointed, focused around The Pantiles.

Southborough

Description	<p>Southborough is a small, linear centre located to the north of the Borough, just north of Royal Tunbridge Wells, which comprises a number of local retail and leisure facilities that cater for the day-to-day needs of local residents.</p> <p>The retail provision in the centre is primarily located along the western edge of London Road. The eastern edge of the centre is predominantly residential dwellings, including a mixed use development currently under construction.</p>
Status	<p>Southborough is classed as a 'Town Centre' within the Tunbridge Wells Core Strategy (2010).</p>



Figure 5.6: View west from Yew Tree Road junction



Figure 5.7 View west by Holden Park Road



Figure 5.8: View west by Forge Road



Figure 5.9 View north along London Road

Table 5.10: Southborough Town Centre Composition

Categories	Southborough (August 2020)		UK Average (June 2020)	Southborough (2016)
	Units (#)	Units (%)	Units (%)	Units (%)
Convenience	6	11.3	8.3	7.5
Comparison	12	22.6	29.1	39.6
Retail Services	11	20.8	16.2	18.9
Leisure Services	8	15.1	24.7	15.1
Financial & Business Services	9	17.0	8.7	5.7
Miscellaneous	0	0.0	0.0	1.9
Vacant	7	13.2	12.0	11.3
Total	53	100.0	100.0	100.0

Source: Nexus Planning 2020, Experian Goad 2020 & 2017 Study

Overall Composition	<p>The centre is currently made up of 53 units, making it the smallest Town Centre in the Borough.</p> <p>The centre benefits from a Tesco express convenience store located to the north of the main parade and within the town centre boundary; however, the unit is located outside of the primary shopping area boundary identified on the Site Allocations Local Plan Proposals Map.</p> <p>A large mixed use development is currently under construction to the east of the centre, which will comprise a Community Hub building, retail unit, new town square, sports pavilion and 69 no. residential dwellings.</p>
Convenience	<p>Southborough has seen a small but relevant increase in convenience units in 2016, from 7.5% (4 units) to 11.3% (6 units), an increase of 3.8 percentage points. The centre has a slightly higher proportion of convenience units than the UK average of 8.3%.</p> <p>The convenience units comprise a Tesco Express to the north and Premier to the south of the centre, as well as a health food shop, bakery, Southborough Post Office and an independent butcher.</p>
Comparison	<p>The centre has seen a significant reduction in comparison units since 2016. In 2016 there were 21 units (39.6%) and in 2020 comparison units accounted for 12 units (22.6%). This is lower than the UK average of 29.1%.</p>

	<p>A majority of the comparison units are independent retailers offering a wide range of goods. The comparison offer comprises a mix of charity shops, sports goods, chemists, carpet and flooring shop, furniture shop and pet shops.</p>
Services	<p>Services account for 52.8% of units within Southborough, which is slightly higher than the UK average of 49.6%. The centre has seen an increase in its provision of services since 2016, when they accounted for 39.6% of the centre.</p> <p>Retail services make up 22.6% (11) of the units, higher than the UK average of 16.2%. A majority of the retail services are made up of the 'health and beauty sector', which account for 63.6% of the retail services.</p> <p>The number of leisure services within the centre has remained constant since 2016, at 8 units (15.1%). This is significantly lower than the UK average of 24.7%. The leisure services within the centre comprise cafes, fast food and takeaway restaurants.</p> <p>Financial and business services have increased by 11.3 percentage points within the centre since 2016, from 3 to 9 units. The centre now has a higher percentage of financial and business services compared to the UK average, 8.7%. The financial and business services include estate agents, building merchants and an employment agency. The centre has no banks or building societies within the centre.</p>
Vacancies	<p>The number of vacant units within the centre has increased by 1.9 percentage points since 2016, with one additional vacant unit within the centre (13.2%). Given the fine margins, the centre can be considered to have a similar vacancy level to the UK average of 12.0%.</p> <p>A number of the vacant units appear to be clustered around the turning to Holden Park Road, towards the middle of the centre.</p>
Pedestrian Flows	<p>During the Nexus site visit it was identified that the pedestrian hotspots were located to the north and south of the centre, particularly around the Tesco Express in the north and the Premier to the south.</p>
Accessibility	<p>Southborough Town Centre does not benefit from a dedicated train station; however, the centre is located just one mile away from High Brooms Train Station, which offers connections to Tunbridge Wells, London (Charing Cross) and Hastings.</p> <p>The centre has two car parks. A public car park is located off Yew Tree Road, Southborough Car Park and facilitates parking for around 60 cars. The car park is pay and display, but offers free car parking for the first hour. Tesco Express</p>

	<p>to the south of the centre has parking for around 20 cars; however, this car park is for customer use only.</p> <p>The centre also benefits from a good bus service, connecting local residents to the town centre along the A26 and on to other nearby centres including Tunbridge Wells and Tonbridge.</p>
Perception of Safety	<p>At the time of the Nexus site visit, the perception of safety was good. The presence of residential dwellings to the east of the centre provides natural passive surveillance, though to a lesser degree than active frontages of publically accessible commercial units.</p>
Opening Hours	<p>The centre lacks an evening economy within the centre, with only four take away facilities, all towards the north of the centre. The Premier convenience store to the south of the centre is open 7am – 10pm Monday to Friday and 8am to 10pm on weekends. The remaining units have conventional opening hours of 9am - 5pm, resulting in a lack of activity within the centre beyond traditional working hours.</p>
Environmental Quality	<p>The centre has a reasonable environmental quality, with a number of units featuring traditional shopfronts. Nonetheless, many shopfronts would benefit from upgrades as fascia signage is also fairly inconsistent throughout the centre.</p> <p>The centre lacks street furniture and would benefit from the introduction of bins and planters.</p> <p>At the time of the Nexus site visit there was construction works towards the east and west of London Road, including a large mixed use development to the east of the centre. The proposed development will provide investment to town centre facilities, as well as extensive hard and soft landscaping, sports pitches and facilities and a proposed Market Place and Town Square with the potential to increase the attractiveness of the centre as a whole, as well as 69 no. residential dwellings, ref. 16/06081/HYBRID and 18/03558/FULL.</p>
Barriers to Entry	<p>The centre does offer car parking, but lacks on street parking. The centre also has a higher vacancy level than the UK average, which could increase due to Covid-19.</p>
Stakeholder Engagement	<p>On Wednesday 23 September, Nexus undertook a meeting with a representative of Southborough Council. The meeting identified the following thoughts and key views.</p>

	<ul style="list-style-type: none"> • The centre has a good range of stores; however, there is a lack of evening economy and leisure services. There is a noticeable turnover of independent stores within the centre. • Since Covid-19 began there has been a change in the way people shop, as a result there is more of a local community within the centre. • The free car park within the centre is always full. • In terms of environmental quality, it is relatively poor including tired pavements. Due to the main road running through the centre, there is a noticeable impact on air quality within the centre. The introduction of planters and green infrastructure would improve the air quality issue, as well as the environmental quality of the centre. It was noted that the street lighting is privately owned, and as a result Christmas lighting / decorations and hanging baskets are not allowed within the centre. • Barriers to entry were considered to include high property prices, whilst some considered there to be a lack of space for new development.
Key Issues	<ul style="list-style-type: none"> • The centre would benefit from an increased focus on shopfront upgrades and the introduction of more street furniture; • Tesco Express, the primary convenience store, is located within the Town Centre boundary but outside of the primary shopping area boundary; • There are no high street bank facilities within the centre; • The centre has a lack of evening economy, with a majority of leisure services comprising takeaways; • The centre has a high proportion of current construction works being undertaken, including the Community Hub.

Paddock Wood

Description	Paddock Wood is a 'Small Rural Town Centre' settlement, located around seven miles north east of Royal Tunbridge Wells. The centre provides a range of services and is surrounded by predominantly residential dwellings. A majority of the services are located along Commercial Road, with a small proportion along Station Road and Maidstone Road. The centre features a Waitrose supermarket and Paddock Wood Train Station to the north of the centre.
Status	Paddock Wood is defined as a Town Centre' within the Tunbridge Wells Core Strategy (2010).



Figure 5.11-12: View north on Commercial Road



Figure 5.13: View north on Commercial Rd

Figure 5.14: View west at Commercial Rd junction

Table 5.15: Paddock Wood Town Centre Composition

Categories	Paddock Wood (August 2020)			UK Average (June 2020)		Paddock Wood (2016)	
	Units (#)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)
Convenience	9	11.5	28.7	8.3	15.3	11.3	31.7
Comparison	18	23.1	28.0	29.1	33.4	37.1	37.6
Retail Services	19	24.4	12.5	16.2	7.1	17.7	6.4
Leisure Services	14	17.9	15.4	24.7	25.7	14.5	9.3
Financial & Business Services	10	12.8	9.0	8.7	7.3	14.5	12.0
Miscellaneous	0	0.0	0.0	0.0	0.0	3.2	2.0
Vacant	8	10.3	6.4	12.0	10.7	1.6	1.1
Total	78	100.0	100.0	100.0	100.0	100.0	100.0

Source: Nexus Planning 2020, Experian Goad 2020 & 2017 Study

Overall Composition	<p>Paddock Wood is a 'Small Rural Town' settlement comprising 78 units. The centre is anchored by a large Waitrose convenience store to the north of the centre with a large car park, adjacent to Paddock Wood train station. Other national multiples include British Red Cross, Cancer Research UK, Greggs, Costa, Tesco Express and McColl's.</p> <p>The town centre is linear in structure, primarily located along Commercial Road. There are a number of residential dwellings to the south of the identified town centre.</p>
Convenience	<p>There are 9 convenience units within Paddock Wood, which makes up 11.5% of all units. The number of convenience units within the centre has risen by 2 since 2016; however, the proportion of units has only increased by 0.2 percentage points and the proportion of floorspace has actually fallen by 3.0 percentage points.</p> <p>The percentage of convenience units in the centre is slightly above the UK average, with 11.5% compared to the UK average of 8.3%. However, the total amount of convenience floorspace (28.7%) is nearly double the UK average (15.3%).</p> <p>The centre features 2 large national multiple foodstores: Waitrose Supermarket and Tesco Express. The centre also features an independent butcher, Gregg's bakery, a McColl's convenience store, an off licence, an independent green grocer, Hurst's convenience store and a key cutting facility.</p>

Comparison	<p>There are 18 comparison units within the centre, which makes up 23.1% of all units. This is the second highest percentage of units within the centre. The number of comparison units within the centre has fallen significantly from 37.1% in 2016 to 23.1% in 2020.</p> <p>As such, Paddock Wood now features a lower percentage of both units and floorspace compared to the UK averages.</p> <p>7 of the 18 comparison units are currently occupied by charity shops, without which, the proportion of comparison retailers in the centre would have fallen even further since 2016. The remaining comparison units comprise independent florists, furniture shops, antique shops, a chemist, carpet shop and greeting cards.</p>
Services	<p>Overall, services equate to 55.0% of units within Paddock Wood. There are 19 retail units (24.4%), 14 leisure services (17.9%) and 10 financial and business services (12.8%) within the centre.</p> <p>Health and beauty services still equate for a majority of the retail services within the centre. Paddock Wood has a greater proportion of retail services (24.4%), compared to the UK average (16.2%). The centre also has a large proportion of retail service floorspace (12.5%), compared to the UK average (7.1%).</p> <p>The centre has a lower proportion of leisure services (17.9%) compared to the UK average (24.7%), although the number of leisure services has increased since the 2016 survey (14.5%).</p> <p>Financial and business services equate to 12.8% of the centre, which is larger than the UK average (8.7%). Despite having a larger proportion than the UK average, the centre has seen a slight drop in the proportion of financial and business services since the 2016 survey (14.5%).</p>
Vacancies	<p>Paddock Wood has seen a considerable increase in vacant units (10.3%), compared to the previous 2016 survey (1.6%). The proportion of vacant units in the centre is slightly below the UK average of 12%. It is also important to note that the survey was undertaken as lockdown restrictions were beginning to be lifted; therefore, the closures may well be as a result of the Covid-19 lockdown restrictions and would benefit from being resurveyed as part of any follow-up plans for the Town Centre.</p>
Pedestrian Flows	<p>During the Nexus site visit, it was observed that there was a consistent flow of footfall towards the north of Commercial Road and around the Waitrose superstore.</p>

Accessibility	<p>Paddock Wood train station is located to the north of the centre, providing direct routes to London (Charing Cross), Strood (Kent) and Tonbridge and Dover.</p> <p>The centre also features four car parks:</p> <ul style="list-style-type: none"> • Paddock Wood Train Station car park - 310 spaces; • Waitrose car park - 160 spaces; • Commercial Road East car park - 45 spaces; and • Commercial Road West car park - 79 spaces. <p>All car parks charge a fee, except the Waitrose car park which is free to customers for a maximum of 2 hours. Commercial Road East and West are free to customers on Sundays.</p> <p>The centre also provides on street parking along Commercial Road, which is free to customers for 1 hour, Monday to Saturday (8.30am – 6.30pm).</p> <p>At the time of the Nexus site visit the car parks had spaces available; however, the Commercial Road West car park was poorly sign posted.</p> <p>Bus services in the centre provide access to Tonbridge and Royal Tunbridge Wells in the west, Cranbrook and Hawkhurst to the south east and East Peckham to the north.</p>
Perception of Safety	<p>When Nexus carried out their site visits the perception of safety was good, due to the pedestrian activity within the centre providing natural surveillance. There was no evidence of anti-social behaviour observed during the site visits.</p>
Opening Hours	<p>The centre has a noticeable lack of evening economy within the centre.</p>
Environmental Quality	<p>Paddock Wood centre is of a reasonable quality; however, there was a noticeable lack of trees or green infrastructure. The centre featured street furniture such as benches, bollards and bin facilities, resulting in a low level of litter.</p> <p>The height and size of storefront fascia boards was relatively consistent throughout the centre, with a majority of adverts being non-illuminated. However, the condition of the shopfronts was relatively tired and appeared to lack upkeep and investment.</p> <p>There was also a noticeable disconnect between the north and south of Commercial Road, due to the residential dwellings located within the middle of the centre.</p>
Barriers to Entry	<p>The lack of clear development sites and cost of units are a potential barrier to entry within Paddock Wood.</p>

<p>Stakeholder Engagement</p>	<p>On Monday 11 September, Nexus led a meeting with representatives of Paddock Wood Business Association and the Town Council. The following thoughts and views were shared in relation to the health of the town centre.</p> <ul style="list-style-type: none"> • The stakeholders identified the centre as having a lack of variety of uses, with a particular saturation of charity shops and estate agents. It was also noted that the centre did not feature an evening economy, identifying a lack of pubs, restaurants and wine bars. • In terms of convenience goods, whilst the centre is relatively well provided for, stakeholders suggested that the centre may benefit from a more local discount foodstore. • A recent reduction in free car parking from two to one hours was considered to have had a negative impact on footfall in the town centre. • Streets were considered to be poorly maintained, particularly pavements, which were highlighted as being cluttered, resulting in obstacles restricting pedestrian movement. • Paddock Wood was considered to have a low level of crime in the centre. • Additionally, it was suggested that landlords were not supportive of independent occupiers, which was highlighted as a potential barrier to entry for new retailers and other occupiers. • Overall, Paddock Wood was considered to be a unique centre that feeds other smaller centres in the area. The centre hosts a variety of events such as an annual carnival and fete, which draws in around 3,000 people. Other successful events include Christmas lights, a football match, and the Paddock Wood Half Marathon.
<p>Key Issues</p>	<ul style="list-style-type: none"> • Despite the success of events there is no evening economy, such as restaurants and bars, that would contribute to the vitality of the centre; • The centre features street furniture, such as bollards, which are not part of a consistent strategy and can restrict pedestrian movement; • There has been a sharp increase in vacancy levels since the 2016 survey; • Poorly sign posted car parking.

Cranbrook

Description	<p>Cranbrook is a traditional, linear market town located within the High Weald Area of Outstanding Natural Beauty (AONB) to the east of Royal Tunbridge Wells.</p> <p>The centre comprises 99 units stretching up The Hill, along Stone Street and around a corner on to the High Street where a large Co-operative food store serves as an anchor.</p>
Status	<p>Cranbrook is defined as a 'Town Centre' within the Tunbridge Wells Core Strategy (2010).</p>



Figure 5.16: View west along Stone Street



Figure 5.17: View west along Stone Street



Figure 5.18: View south on High Street



Figure 5.19: View towards George Hotel car park

Table 5.20: Cranbrook Town Centre Composition

Categories	Cranbrook (August 2020)			UK Average (June 2020)		Cranbrook (2016)	
	Units (#)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)	Units (%)	Floorspace (%)
Convenience	10	10.1	23.8	8.3	15.3	10.6	25.7
Comparison	30	30.3	24.6	29.1	33.4	42.6	33.5
Retail Services	19	19.2	9.2	16.2	7.1	12.8	5.9
Leisure Services	15	15.2	20.2	24.7	25.7	9.6	8.4
Financial & Business Services	14	14.1	15.5	8.7	7.3	12.8	13.3
Miscellaneous	0	0.0	0.0	0.0	0.0	2.1	4.2
Vacant	11	11.1	6.6	12.0	10.7	9.6	9.0
Total	99	100.0	100.0	100.0	100.0	100.0	100.0

Source: Nexus Planning 2020, Experian Goad 2020 & 2017 Study

Overall Composition	<p>There are currently 99 units within Cranbrook, the largest of which is the Co-operative foodstore to the east of the High Street. The centre has a wide range of services, including a positive mix of independents and national multiples including Lloyds (bank), Costa Coffee and Oxfam.</p> <p>Given its rural setting, the centre is highly accessible via car, with a number of free car parking spaces along the High Street, as well as car parks.</p>
Convenience	<p>The centre comprises 10 convenience units, which is 10.1% of the centre and has not changed since the 2016 retail study.</p> <p>The convenience units comprise the Co-operative, two bakers, two. butchers, two convenience stores, one health food store, one off licence and one tobacconist.</p> <p>The number of convenience units in the centre is slightly above the UK average of 8.3%. However, the total amount of convenience floorspace (23.8%) is significantly higher than the UK average (15.3%) suggesting that these stores take up larger units within the centre.</p>
Comparison	<p>There are 30 comparison units located in Cranbrook, which accounts for 30.3% of all town centre units, which is slightly higher than the UK average (29.1%).</p> <p>The centre has seen a considerable drop in comparison stores since 2016, when comparison units accounted for 42.6% of the centre. Despite the similar</p>

	level of comparison units to the UK average, smaller units mean that the centre has a lower level of floorspace (24.6%) to the UK average (33.4%).
Services	<p>The centre has seen an increase in services (retail, leisure, financial and business services) since 2016.</p> <p>Retail services have risen from 12.8% in 2016, to 19.2% in 2020, which is now slightly above the UK average.</p> <p>Leisure services account for 15.2% of units, which is below the UK average of 24.7%. Despite the centre having a lower proportion of leisure services to the UK average, the centre has seen a rise in leisure services since 2016 (9.6%).</p> <p>Financial and business services account for 14.1% of units in the centre, which is a slight increase since 2016 (12.8%). The existing proportion is nearly double the UK average (8.7%). A majority of the financial and business services are estate agents, with seven estate agents (50.0%) within the centre. A cluster of financial and business services are located to the western edge of the town centre, along the High Street.</p>
Vacancies	<p>The centre has a lower proportion of vacant units (11.1%) compared to the UK average (12%). The centre has seen a slight increase in vacant units from 2016 (9.6%). Despite the increase in vacant units since 2016, the percentage of vacant floor space has fallen from 9.0% in 2016, to 6.6% in 2020.</p> <p>A high proportion of the vacant units (45%) are clustered towards the eastern edge of the centre, along Stone Street.</p>
Pedestrian Flows	At the time of the Nexus site visit, the pedestrian footfall within the town was relatively low. The main focus of pedestrian flow was observed along High Street, towards the entrance of the Co-operative car park.
Accessibility	<p>There is no train station in Cranbrook and there are limited bus services that run to Tenterden, Pembury and Royal Tunbridge Wells.</p> <p>There are four car parks located in the town centre:</p> <ul style="list-style-type: none"> • High Street car park - 150 spaces; • Co-operative foodstore car park - 50 spaces; • Jockey Lane car park - 44 spaces; and • Tanyard car park - 89 spaces. <p>The High Street, Jockey Lane and Tanyard car park are all free for the first two hours.</p>

	There are also a number of car parking spaces available along the High Street, which offer one hour free parking and were seen to be frequently used over the course of Nexus' site visits.
Perception of Safety	When Nexus visited Cranbrook it was observed that the High Street had good natural surveillance. No CCTV was identified.
Opening Hours	A high proportion of businesses open 9:00am - 5.30pm, resulting in the centre not have an established evening economy. This is reflected in the centre having a lower proportion of leisure services than the UK average.
Environmental Quality	<p>Cranbrook benefits from an attractive and well developed environmental quality. The shopfronts are kept to a high standard, with character and architectural details. The pavements are wide and feature street furniture, including bollards and bins. A low level of street lighting was observed within the centre.</p> <p>On-street parking dominates the street scene, especially along the High Street, which has a negative impact on the environmental quality.</p>
Barriers to Entry	A high proportion of units within the centre are listed buildings, this is potentially a barrier to entry for new businesses as any alterations will have to demonstrate a lack of harm to the historic environment.
Stakeholder Engagement	<p>On Tuesday 22 September, Nexus undertook a meeting with a representative of Cranbrook and Sissinghurst Parish Council. The meeting identified the following thoughts and key views.</p> <ul style="list-style-type: none"> • The centre has a good range of services and facilities; however, independent shops appear to be suffering and the centre does not provide items such as menswear and furniture. • Footfall within the centre has fallen over the years. • Events within Cranbrook include Cranbrook Goes Nuts in May, the Apple Fayre, the Christmas Markets, Cranbrook in Bloom and a Vintage Car Rally.

Key Issues

- The centre has a strong independent presence; however, stakeholder engagement suggested that independent units were struggling within the centre.
- A high proportion of the centre is listed, resulting in an attractive environmental quality;
- The centre lacks leisure services, including restaurants. As a result, the centre has a poor evening economy.

Hawkhurst

Description	<p>The centre of Hawkhurst is located within the High Weald AONB, based around the busy junction of the A268 (Cranbrook Road/ Highgate Hill) and the A229 (High Street/ Rye Road).</p> <p>A Waitrose supermarket to the east of the centre anchors the town centre, as well as a Tesco supermarket just beyond the town centre boundary along Rye Road, as well as a BP petrol filling station also providing a draw for passing vehicular traffic.</p>
Status	<p>Hawkhurst is classified as a 'District Centre' within the Tunbridge Wells Core Strategy (2010).</p>



Figure 5.21: View south along the A229



Figure 5.22: View east on High Street



Figure 5.23: View west along Rye Road



Figure 5.24: View north along A229

Table 5.25: Hawkhurst Town Centre Composition

Categories	Hawkhurst (August 2020)		UK Average (June 2020)	Hawkhurst (2016)
	Units (#)	Units (%)	Units (%)	Units (%)
Convenience	5	13.9	8.3	10.0
Comparison	9	25.0	29.1	37.5
Retail Services	6	16.7	16.2	17.5
Leisure Services	8	22.2	24.7	17.5
Financial & Business Services	5	13.9	8.7	7.5
Miscellaneous	0	0.0	0.0	0.0
Vacant	3	8.3	12.0	10.0
Total	36	100.0	100.0	100.0

Source: Nexus Planning 2020, Experian Goad 2020 & 2017 Study

Overall Composition	<p>Hawkhurst is the smallest centre out of the five centres assessed within this Study, made up of 36 units.</p> <p>Whilst the district centre is predominantly made up of independent retailers, there are a number of high-profile national multiple retailers in the centre.</p> <p>An anchor Waitrose convenience store is located to the east of the centre, whilst the centre also features a BP Petrol Filling Station (with an associated Londis convenience store) and a Tesco Metro.</p> <p>The centre features a parade of Grade II listed units, called 'The Colonnade', as well as a small, single screen digital Kino Cinema in the Victoria Lecture Hall and a medical practice, as well as a number of residential dwellings.</p>
Convenience	<p>There are five convenience units in the centre including a Waitrose, a BP garage, an independent butcher, an independent baker and a green grocer.</p> <p>Convenience units make up 13.9% of the overall composition of Hawkhurst, which is above the UK average of 8.3%.</p>
Comparison	<p>There has been a fall in comparison units within the centre since the 2016 survey, from 15 (37.5%) to 9 units (25.0%). As such, the centre now features a lower proportion of comparison units than the UK average of 29.1%.</p> <p>The majority of comparison units in the centre are independent stores, including soft furnishings, florists, chemist and gift shops.</p>

Services	<p>Overall, services account for 52.8% of the centre, a rise of 10.3 percentage points from 2016, where they accounted for 42.5%.</p> <p>There are six retail services within Hawkhurst (16.7%), which broadly matches the UK average of 16.2%. Six of the seven retail services are classed within the health and beauty category.</p> <p>The centre also has a similar level of leisure services (22.2%) to the UK average (24.7%). The centre has seen an increase in leisure services of 4.7 percentage points since 2016 (17.5%). Leisure services include a cinema, five takeaways, a café and gym. Notably, three takeaways are located within a cluster to the south of the centre along the A229.</p> <p>There has been an increase in financial and business services within the centre, from 7.5% (three units) in 2016 to 13.9% (five units) in 2020, resulting in a greater proportion of financial and business services than the UK average of 8.7%. The financial and business services include estate agents, a photo copying service and an independent computer service.</p>
Vacancies	<p>Vacancy levels within the centre have fallen by 1.7 percentage points since 2016, to 8.3% (three units). The centre has a lower proportion of vacancy levels compared to the UK average of 12%.</p>
Pedestrian Flows	<p>At the time of the Nexus site visits, the majority of footfall within the town centre was observed along The Colonnade on Rye Road, with a number of residents linking trips from parking facilities in the Waitrose supermarket.</p>
Accessibility	<p>There are four car parks that serve the centre:</p> <ul style="list-style-type: none"> • Waitrose car park – 63 spaces; • North Grove car park - 34 spaces; and • Tesco car park - 82 spaces. <p>Car parking at Waitrose and Tesco are restricted to customers only, Waitrose provides two hours free parking for customers and Tesco provides one and a half hours free parking for customers. The North Grove car park is free for the first two hours. There is also on street car parking for five cars outside The Colonnades along Rye Road. The parking is free for one hour, Monday to Saturday, 8am to 6pm.</p> <p>Hawkhurst is not serviced by a train station and has limited access to bus services.</p>
Perception of Safety	<p>Perception of safety in Hawkhurst was mixed at the time of Nexus' site visits. The narrow pavement to the north of the centre along the A229 did not allowing for safe passing of pedestrians, detracting from the centre.</p>

Opening Hours	<p>Due to the type of services within the centre, Hawkhurst has a lack of evening economy, with a majority of units closing at 5:00pm-5.30pm.</p> <p>Nonetheless, there is a cluster of leisure services to the south of the centre, along the A229, including three takeaways and a public house, as well as a local cinema facility.</p>
Environmental Quality	<p>The centre has relatively high environmental quality, particularly around The Colonnade, which has attractive and consistent shopfronts with character, as well as hanging plants and street furniture. The centre also features a good level of green infrastructure including trees and hedging.</p> <p>However, the vehicular crossroads dominate the street scene, detracting from the character of the centre.</p>
Barriers to Entry	<p>Any alterations to the Grade II Listed, The Colonnade, would require listed building consent and must not result in harm to the listed buildings. This could result in difficulties for new occupiers, particularly with branding likely to be restricted. However, these restrictions appear to have produced high quality shop frontages that contribute positively to the attractiveness of the centre.</p> <p>Despite the lack of on-street parking options, the centre is relatively well provided for by car parking options for its size. Given the dominating road layout, these could be better highlighted to encourage linked trips.</p>
Key Issues	<ul style="list-style-type: none"> • The centre has a low vacancy level compared to the UK average, and a strong convenience on offer for a small District Centre, including a Waitrose, Londis and out of centre Tesco, in addition to a local cinema. • The centre has a positive environmental quality, with The Colonnade having been recently renovated and a high level of green infrastructure. However, this is diminished by the prominence of the busy crossroads.

6.0 Office Market Review

Introduction

- 6.1 The assessment that comprises this chapter of the Study has been prepared by Rupert Farrant MRICS, senior partner of Durlings. The assessment draws upon available knowledge to assess and comment on the current Royal Tunbridge Wells Town Centre office market and commentary on the Article 4 directive, introduced by the Council since Durlings previous report (Town Office Market Review – Tunbridge Wells, February 2018).
- 6.2 The assessment updates previous data provided in 2018 to assess the current position on the available space in the town centre, losses, gains, and take up trends, whilst also considering supply in the wider area.
- 6.3 It is envisaged that the findings of this chapter, together with other evidence and the chapters in this report, will assist the Council in providing details to support potential allocations (where found to be suitable) and compiling development management policies as part of the preparation of a new Local Plan.

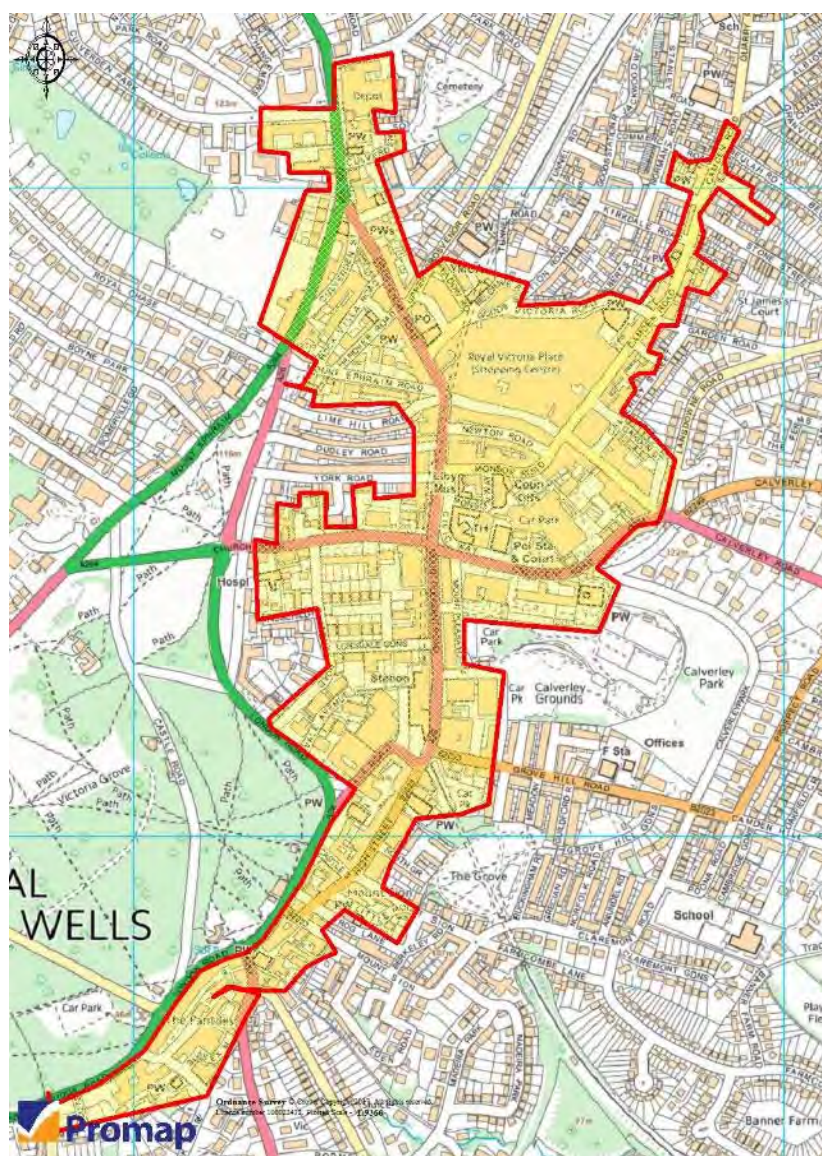
Methodology

- 6.4 The information and data collected for this chapter has been obtained by a physical inspection of the Study Area and conducting street level surveys during September 2020. From this survey details were collated of the principal office space in Royal Tunbridge Wells, in existence as of September 2020, and compared to the figures reported in February 2018.
- 6.5 TWBC have agreed that “principal office space” should be limited only to include all purpose-built, and non-purpose-built space – (providing it is in excess of 465 sq m). AspinalVerdi have researched market demands and trends for this ‘sub’ market separately along with the emergence of the serviced office / co working sector in Chapter 3. The reason for excluding non-purpose built stock below 465 sq m from this assessment is that it tends to be ancillary space to retail, and generally lacking in modern amenities required by today’s occupiers and, as such, has little impact on our overall findings for the purpose of forecasting potential increases in demand and supply.

- 6.6 The relevant floor areas of each qualifying building have been collated by referring to The Valuation Office Agency's website (business rates). This information has then been cross-referred to the past and current planning status of each property using the Council's planning website.
- 6.7 The basis for measurement is on a net internal basis, being the recognised method of measurement for offices, and as determined by the RICS Code of Measuring Practice 6th Edition. The unit of measurement is square metres (sq m).

Study Area

Figure 6.1: Office Market Review Study Area (Royal Tunbridge Wells) – 2018 & 2020



- 6.8 The study area covered by this chapter is broadly as before, in our January 2018 report, confined to Royal Tunbridge Wells Town Centre and specifically comprises the Central Parking Zone (Commercial) as defined in the Site Allocations Development Plan Document – Royal Tunbridge Wells (Central Area) Proposal Map.
- 6.9 However, for this updated assessment, the Council has requested that we include a small business park, on the northern edge of the town's common, known as 77 Mount Ephraim, which provides an additional 6,317 sq m (approximately) of high quality office space, in two buildings known as Brockbourne House and Oakhurst House, developed around the 1980s/90s.
- 6.10 The Royal Tunbridge Wells Town Centre area, along with the annexed 77 Mount Ephraim are illustrated by the two maps at Figures 6.1-6.2.

Figure 6.2: Additional area for 2020 – 77 Mount Ephraim – RTW 19



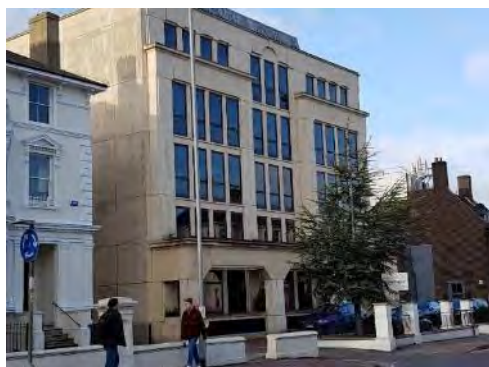
Town Centre Office Supply

- 6.11 The following commentary is a review of the updated figures of available office accommodation in the Royal Tunbridge Wells Town Centre area (see Figure 6.3). The survey is concerned only with space in excess of 465 sq m (5,000 sq ft). Our instructions were to extend the study area to include the office buildings at 77 Mount Ephraim – Brockbourne House & Oakhurst House, which increases the total floor space subject to the study.
- 6.12 We have reviewed changes to the available floor space, from January 2018 alongside considering the Article 4 directive which seeks to protect specific buildings from change of use through the Permitted Development route. From the remaining office space calculated in 2018 44,294 sq m - 9,910 sq m has been converted, or in the process of being, to alternative use space.
- 6.13 The buildings that are no longer in office use since 2018 are:

Calverley House – 6,135 sq m – Residential



Westcombe House – 1,452 sq m – Residential



Vale House – 1,501 sq m – Residential



Bank House – 822 sq m – Leisure



6.14 Notably, none of the above buildings were subject to an Article 4 directive.

6.15 In terms of gains in office space, where consent has been implemented and space is occupied, or ready for occupation, the following have been created:

22 Mount Ephraim – 3,547 sq m – new build



Heathervale House – 1,547 sq m – additional space by extension to the existing building



Corn Exchange Arcade – 650 sq m – change of use from retail



Royal Victoria House – 517 sq m – change of use from a restaurant



- 6.16 This results in just over an 8% net loss of office space, from the 2018 total.
- 6.17 In terms of potential gains in office space, where consent has yet to be implemented, the following have been granted consent:

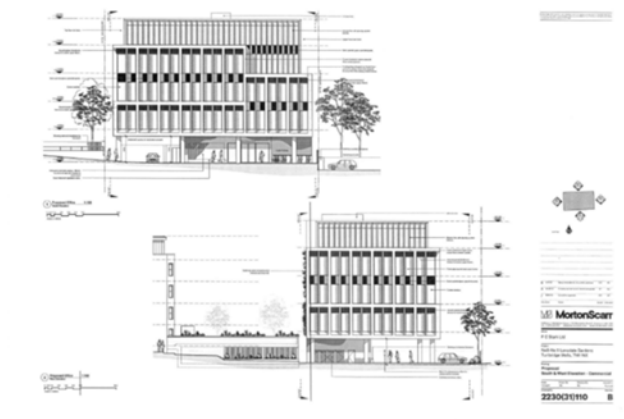
One Tunbridge Wells, Mount Pleasant Avenue

- 6.18 Offices - part of The Civic Development Site (Calverley Park, etc.). Approximately 3,000 sq m of consented space.



No. 1 Vale Avenue

- 6.19 This proposal forms part of the consent to convert 3-5 Lonsdale Gardens to 13 apartments but conditioned to include a new office building, to the rear to replace the existing space 1,409 sq m.
- 6.20 This property was subject to an Article 4 directive.



Teldis House, Mount Ephraim

- 6.21 Consent to convert an existing warehouse to provide approximately 543 sq m of offices.



The former Auction Hall, Linden Park Road

- 6.22 The existing building has consent to convert and install an additional floor to provide 409 sq m of offices.



Article 4 Buildings

- 6.23 There are 16 buildings in the previous study area subject to the Article 4 directive. This now increases to 18 by including 77 Mount Ephraim (Brockbourne House and Oakhurst House).
- 6.24 The buildings subject to the Article 4 directive are highlighted in purple in the accompanying schedule (**Appendix E**).

- 6.25 Of these only one remains subject to PD prior approval (part J) – Wellington Gate – 1,785 sq m, but unimplemented.
- 6.26 Another, 3-5 Lonsdale Gardens – 1,409 sq m – which has recently obtained consent for the conversion of the existing office space to provide 13 apartments, although with a new building office block to the rear (No.1 Vale Avenue) to be of a similar floor area to the existing office space. In fact, the application states there is approximately 15 sq m of additional space, so a very marginal increase, and as such not strictly a potential loss of space. The planning condition requires the office building to be constructed prior to 3-5 Lonsdale Gardens being occupied.
- 6.27 So, in summary, the Article 4 directive has, perhaps, protected the named buildings to date.
- 6.28 Those protected by Article 4 provide a cumulative total of 33,135 sq m – 29% of this space is occupied by AXA PPP (9,565 sq m), which helps to provide a degree of protection as they are owner occupiers.
- 6.29 Economic factors, such as Brexit (2016-2020) may also have contributed to landlord's resistance to sell buildings during this period.

Further Retention of Office Space

- 6.30 This Report has already highlighted the potential for loss of office space with unimplemented planning approval or Permitted Development Prior Approval for change of use to residential, with an estimated loss in the Study Area of approximately 6,224 sq m.
- 6.31 With the current legislation on PD Rights remaining in force for the time being, and likely to be replaced with a similar process, it is necessary to look at the existing stock of office space where Prior Approval has yet to be sought in order to see if it is possible for it to be retained.
- 6.32 As currently legislated, PD Rights can only be controlled through Article 4 directives; however, listed buildings are also exempt from Permitted Development changes of use under the current legislation. As referenced earlier in the Study, new legislation controlling PD Rights is expected later in 2021; however, we do not have any reason to believe that the above factors will change at the time of writing.
- 6.33 The following buildings are listed, but without Article 4 protection:

- 18 Mount Ephraim Road
- 20 Mount Ephraim Road
- Royal Victoria House, The Pantiles
- The Corn Exchange, The Pantiles

6.34 These buildings provide a total of approximately 2,787 sq m. Notably, this list does not include the listed Town Hall building, which is not classified as an office use. The Town Hall would formerly have fallen under Use Class D1 (not B1), it is now likely to fall within Use Class F1 (and not E).

6.35 We have also considered those buildings that we feel should be subject to Article 4 directives (excluding those above). These are as follows:

- Carriage House, Grosvenor Road – 1,305 sq m
- 22 Mount Ephraim – 3,547 sq m
- Lonsdale Gate, Lonsdale Gardens – 895 sq m
- Windsor House, Mount Ephraim Road – 806 sq m
- *Foundation House, Coach & Horses Passage – 557 sq m*
- *Dowding House, Coach & Horses Passage – 650 sq m*
- *Frant House, Coach & Horses Passage – 557 sq m*
- *Eridge House, Coach & Horses Passage – 232 sq m²⁶*

6.36 The above buildings provide a total of 8,549 sq m.

6.37 The reason for selecting these buildings for consideration for Article 4 protection is due to the quality of office space, with the majority of the buildings experiencing long occupancy periods.

Encouraging New Employment Space: The Opportunities

6.38 The following sites had previously been identified as having the potential to provide new office space:

Civic Centre Development Project – Calverley Grounds / Mount Pleasant Avenue

6.39 This was a Council initiative to develop land in their ownership to create new offices, partly for their own occupation and also to create 1,858 sq m of new space to the market, and thus freeing up the current Town Hall for redevelopment.

²⁶ Foundation, Dowding, Frant and Eridge houses are adjoining and largely purpose built, offering a range of occupational space options.

6.40 Although this proposal received planning consent, which included a new theatre in place of the car park behind The Great Hall, the Council's Full Council voted last year to not proceed with the project. Consideration may be given to promoting the office element alone of this proposal in the future.

6.41 Should approval be given, it is envisaged a 2-3-year construction timescale will be required.

The Town Hall

6.42 There are clearly redevelopment opportunities for this building and the Council will have the opportunity to influence the mix of uses to include an appropriate proportion of office space.

6.43 However, as the availability of this site is perhaps linked to the Civic Centre Development Project, then the timescale will be at least 3-5 years before any development might take place.

Union House Development (Dandara), The Pantiles

6.44 The new development provides for a number of apartments with over 836 sq m of commercial space on the ground floor. Although the planning consent appears to allow a wide range of commercial uses it is possible that this may be of interest to office occupiers and thus provide a neighbouring use which will be advantageous to the apartments, and thus attractive to the developer.

Torrington Car Park, Vale Avenue

6.45 This building is situated in the "Vale Avenue Area of Change" (Local Plan 2016). The location is excellent in terms of its proximity to the train station. No detail is available on the size of the building or the number of car spaces it provides. There may be an opportunity to redevelop this building, whilst retaining a sufficient number of car spaces. A more detailed appraisal will be required in due course.

Cinema Site, Mount Pleasant Road

6.46 This site now has full planning approval for a mixed-use scheme predominately comprising residential with retail and leisure uses, including restaurants and a cinema. It has, however, been announced in the press recently that the current landowner is to put the site on the market, and will not be proceeding with the development. Although disappointing, this does offer the opportunity perhaps for alternative uses to include offices.

Existing Office Market

History of Town Centre Office Development and Access

- 6.47 The main driver for the development of office space in Royal Tunbridge Wells, from the 1970s through to the late 1980s, was to provide accommodation at a far lower occupational cost than London. This appealed to the larger companies, particularly in the financial sector, with current remaining occupiers including AXA PPP and Reliance Assurance. Previous major employers in the town also included NPI, Allied Dunbar and government organisations such as The Land Registry.
- 6.48 Royal Tunbridge Wells has a good direct train service to London Bridge, Charing Cross and Cannon Street, with a typical journey time of around 50 minutes. Despite the dualling of the A21 between the North Farm Industrial Estate and Tonbridge, road communications remain poor, particularly with restricted access to the town centre, and only by single carriage via the A26 from the north of the town, or via the Pembury Road to the east. By either route it is approximately 3 miles from the town centre to the A21 (T), with junction 5 of the M25 a further 15 miles to the north.

Quality of Office Space

- 6.49 Although there remains a relatively high level of office space in the town centre, the majority of the purpose built stock is between 25 to 40 years old and falls a long way short of the current BREEAM ratings one would expect with newly built space. This is explained more fully below.
- 6.50 We have recorded that around 87% of the remaining total office space is purpose built (NB – non purpose-built space below 465 sq m is disregarded for the purposes of this chapter). This percentage has increased from 80% (January 2018)
- 6.51 The office sub-market tends to be made up of character period buildings, having been refurbished in an attempt to get close to current office requirements. These buildings, many of which are below the threshold of 465 sq m adopted for this chapter, are occupied by local home-grown businesses such as solicitors, accountants, architects, and general professional service companies.
- 6.52 BREEAM is the Building Research Establishment Environmental Assessment Method which is the code of strategic principles created by the world's leading sustainability body, the Building Research Establishment. The code defines an integrated approach to the design, build and management of a

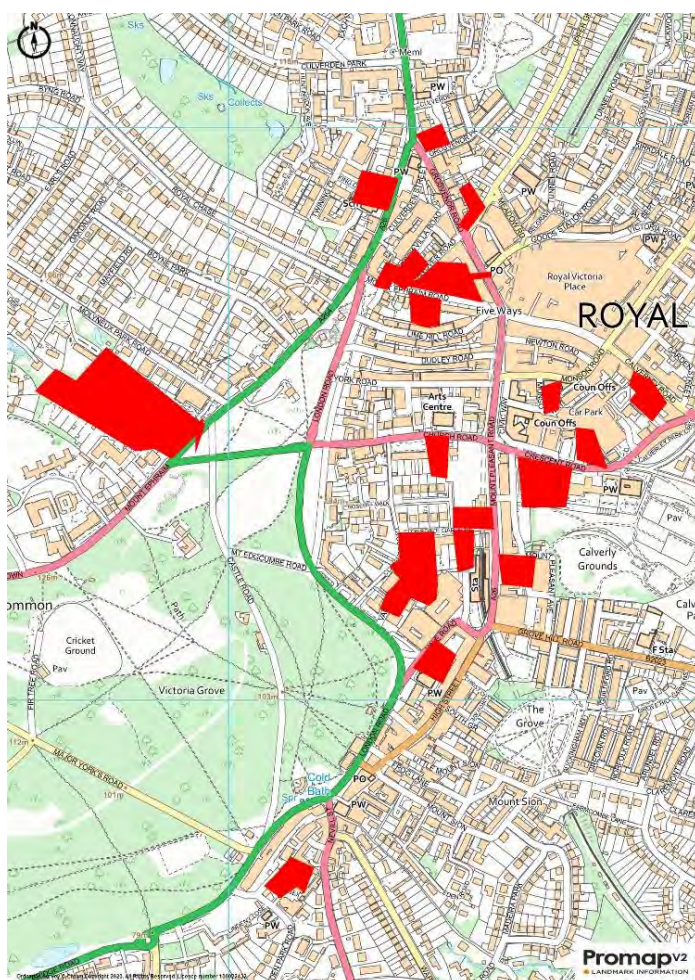
building from a sustainability perspective. The BREEAM rating benchmark enables one to compare an individual building's performance with other BREEAM rated buildings and the typical sustainability performance of new non-domestic buildings in the UK.

- 6.53 With the exception of 22 Mount Ephraim, which achieved a "Very Good" BREEAM rating (3), research for this chapter indicates that all the remaining current office space will have unclassified BREEAM ratings. This essentially means that the remaining stock is of the poorest quality in terms of BREEAM assessment, and essentially within the bottom 25% in terms of their performance nationally.

Location of Offices

- 6.54 An updated map (Figure 6.2) highlighting the principal office buildings in the Study Area is provided below.

Figure 6.2: Existing Office Locations



- 6.55 These locations are evenly spread through the town with the most peripheral buildings still within a 15-minute walk to the main train station.

Advertised space (as of November 2020)

- 6.56 The space being actively advertised in the study area at the date of this Report is as follows:

Courier (Cadogen) House, Calverley Road

- 6.57 A purpose-built office building, constructed around the late 1990s, comprising 818 sq m. The space is open plan with a lift and comes with 40 car spaces.



Mount Pleasant House, Lonsdale Gardens

- 6.58 Two separate open plan office suites of 125 & 478 sq m in a purpose-built building constructed during the early 1980s. The space is air conditioned and there is a lift. There are a total of 21 car spaces.



Wellington Gate, Church Road

- 6.59 Various individual floors available in a substantially refurbished purpose-built building, totalling 1,054 sq m. The floors are open plan, there are two lifts and the building is air conditioned. There is parking provision for each floor, albeit limited.



The Great Hall, Mount Pleasant Road

- 6.60 An open plan floor in a purpose built mixed use building which includes a retail arcade on the ground floor. The offices are accessed by a lift and have 10 on site car spaces.



Utmost (Reliance) House, Vale Road

- 6.61 Purpose built office building comprising 1,417 sq m. The agent's website has limited details on specification. As purpose built, assumed to be around the mid-1980s, we have anticipated the building has a lift and a reasonable parking provision.



Hanover House, Mount Ephraim Road

- 6.62 A period office building comprising 545 sq m with 19 car spaces and a lift.



- 6.63 The combined total of the office space within the buildings in the study area detailed above is 4,975 sq m, within 6 separate building.

Office Space Demand and Take Up

- 6.64 Durlings is one of three principal local commercial property agency firms active in the office market within the Study Area.
- 6.65 As at November 2020 Durlings has 267 companies or individuals registered and seeking office space – similar to the 2018 registrations. Of these, 242 are seeking space up to 465 sq m and 61 in excess of 465 sq m. So, broadly 90 % of enquires are for space under 465 sq m.
- 6.66 Durlings has analysed the take up of space by calculating new letting through this firm alone over the study period, between November 2017 – November 2020. The average annual take up of space over this period does not deviate to any significant degree from the figure recorded in our January 2018 report – which looked at the period between June 2013 through to January 2018.
- 6.67 Of the individual transaction numbers, the number involving buildings over 465 sq m over the last 3 years is as follows:
- 2017/18 – 5%
 - 2018/19 – 14%
 - 2019/20 – 11%
- 6.68 From this we can see the local office market to date is largely made up of occupations of space less than 465 sq m – principally start-ups or SMEs migrating within the town.
- 6.69 The figures for the total take up of office space in the Study Area over the study period are not available, but as there are two other agents actively involved in letting offices, it would be a reasonable assumption to apply a multiplier of 3 to Durlings' figures.

Office Space Available Currently

Availability – Micro

- 6.70 We identified a total of 4,975 sq m of available office space (in excess of 465 sq m) across the study area. Our January 2018 report recorded no office space in excess of 465 sq m, so this presents a significant increase in availability.

- 6.71 We then looked at the office space availability regionally, and below have calculated the cumulative sq ft currently available as you move out from the centre of Royal Tunbridge Wells, in the competing centres, based on a 3 mile, 5 mile, 10 mile and 15 mile radius.

Availability – Macro

- 6.72 All spaces in the wider Tunbridge Wells area (including the study area) – 7,648 sq m – it was less than 743 sq m in 2018, so around a 10-fold increase.
- 6.73 The following is the cumulative total over an increasing search radius from the centre of Royal Tunbridge Wells, with figures in brackets taken from the January 2018 report:
- 3 miles – 7,867 sq m (1,784 sq m) – equating to a 4-fold increase
 - 5 miles – 11,336 sq m (2,987 sq m) - equating to a 4-fold increase
 - 10 miles – 13,303 sq m (3,823 sq m) - equating to a 3.5-fold increase
 - 15 miles – 36,750 sq m (24,494 sq m) - equating to a 1.5-fold increase
- 6.74 The results illustrate that there remains a relatively limited supply in the neighbouring towns of Tonbridge and Sevenoaks and along the A21 corridor. A large proportion of the currently available space is in Maidstone and Kings Hill, with the latter offering modern, well-specified space with excellent parking provision in business park locations.
- 6.75 Although viewed as an important commercial centre, Royal Tunbridge Wells cannot be regarded as one of the principal Kent or Sussex business districts when compared to Ashford, Maidstone or Crawley.

Kent Office Market

- 6.76 The impact of the Covid-19 pandemic is being felt across the UK property market. Letting activity came largely to a halt at the time of lockdown and to date has shown only limited signs of recovery.
- 6.77 Tenants, particularly in the retail, leisure and travel sector immediately felt the impact with multiple CVAs and business closures occurring over the summer, with more to come no doubt in the autumn/winter. Inevitably, the investment market reacted cautiously, with transactional volumes significantly reduced at the time of writing (September 2020). The recession caused by the coronavirus

pandemic will be less severe than initially forecast by the Bank of England, but currently it still expects UK economic output to decline by 9.5% in 2020, with an almost doubling in unemployment to 7.5% by the end of the year. As the last several months have shown, things can change very quickly, but it is clear we are heading for a very difficult economic period. This will inevitably have severe implications for property performance.

- 6.78 At a national level the Investment Property Forum (IPF) Survey of Independent Forecasts suggests the total return from property will be -7.4% in 2020, driven by not only sharp falls in capital values across the sectors, but also declines in rents, averaging -5.0%.
- 6.79 The Kent market generally reflects the national pattern. As might be expected, science parks such as Discovery Park (Sandwich), Kent Science Park (Sittingbourne) and Kent Medical Campus (Maidstone) have been particularly active with Covid-19 related activities combining with demand from other scientific businesses. There is also some evidence of companies looking to the county as an alternative to, or as a supplement to, a Central London presence. Rents remain stable, but the market remains tight. Businesses seeking new or expansion space will find limited options over the coming year. The County's office market has seen lower levels of activity, with greater caution shown towards town centre locations during the lockdown period. However, the arrival of a few tech businesses combined with the burgeoning critical mass of creative industry activity will support Kents future recovery. Knowledge intensive industries such as these will be fundamental to the future positioning of the UK economy.
- 6.80 Furthermore, given likely long-term changes to working patterns, local towns may increasingly attract businesses and co-working space as full time commuting takes a backseat. Time will tell how such structural changes will play out, but the County's attractive towns with relatively affordable housing and good transport infrastructure might be expected to prosper in such a scenario. This would also be positive for many of Kent's town centre markets over the longer term.
- 6.81 The latter months of 2019 saw a little more confidence in the town centre office market across the South East, buoyed by greater political certainty and an uptick in economic confidence. The wider M25 office market demonstrated burgeoning requirements from companies in knowledge intensive business sectors in particular. Kent saw similarly positive demand, although activity remained biased towards local business growth, and smaller floorspace lettings.

- 6.82 However, the pandemic crisis inevitably impacted on activity across the county, with both uncertainty and lockdown delays driving a sharp downturn in take up since March, up to Q1 2020. Despite a number of lettings in the second half of 2019, there was limited evidence of rental growth and as a result, the office performance average prime rent at Q1 2020 remained stable at £182 psm. This translates to an annualised average growth rate of 5.3% over the last five years.
- 6.83 The latter months of 2019 included a number of key lettings. 60 London Road, Sevenoaks, saw two sublets in September. Building maintenance company Hemlow, took 465 sq m at a rent of £296 psm while HR consultancy, Credence Background Screening, took 650 sq m at a rent of £269 psm. In October, Royal Tunbridge Wells saw the AA take 268 sq m at Century Place, Lamberts Road, at a rent of £248 psm. In the same month, the Fin tech company, FIS Global Trading, took 465 sq m at a rent of £388 psm at Mount Pleasant House, Lonsdale Gardens. Meanwhile, in Ashford 780 sq m was let at Kent House, Station Road at £172 psm in early March prior to the lockdown. Maidstone saw a steady spate of small floorplate take-up prior to lockdown, but few larger lettings. East of the county, the high-tech engineering and R&D company Phoenix Photonics, took 210 sq m of office and engineering space at Sarre Business Centre, Canterbury Road, Sarre in November.
- 6.84 Even prior to the pandemic, there was little new town centre office space coming forward. However, in April, Quinn Estates and U+I received planning consent for a £250m mixed-use film studio development on a former 5.1ha (12.6 acre) railway works. The new Ashford International Studios, located next to the International Station and located in the Thames Estuary Production Corridor which has a vision to develop a world-class hub for cultural and creative production, will provide a 18,580 sq m film studio complex, with 8,361 sq m of business space in the Grade II Listed former engine sheds. The Media Village will be geared towards SMEs and supporting industries with educational links.
- 6.85 The Thames Estuary Production Corridor will be further supported by £6.5million of funding, part of which will be used to redevelop vacant and underused buildings for creative use. Pilot projects in the county include the delivery of the Docking Station, in the Grade II-listed former Police Section House in Chatham's Historic Dockyard.
- 6.86 In September, Yellow Tree Capital received consent for a new five story office and residential scheme on Pembroke Road, Sevenoaks. Meanwhile, Maidstone Borough Council is considering the

development of a new four-storey civic centre with Kent County Council, on the site of the former Royal Mail sorting office next to Maidstone East Railway Station. In July, planning approval was secured for a start-up business hub at Pier Works, as part of Clifton Slipways, Gravesend.

- 6.87 The County saw relatively few investment sales even prior to the pandemic crisis. In October, 892 sq m Lonsdale Gate on Lonsdale Gardens was sold by Threadneedle to Penhurst for £3.05m. In January, the 811 sq m New Marlborough House, comprising office and warehouse space in Rochester, was sold by Havenhill for £1.15m. First Point, formerly Whatman House, was purchased by a subsidiary of Group1Auto for circa £6m.
- 6.88 Over the last two years, there has been a depletion of suitable office to residential conversion stock. However, the County has seen a couple of transactions over the last 12 months. In December, Oak Hill House, the Fidelity International HQ, comprising 9,290 sq m office / data centre campus set in 16 acres of parkland was purchased by Berkeley Homes. In addition to the three office buildings on site to be converted, the site includes a listed mansion house that will be returned to residential use. The development site will also incorporate new build housing as part of a wider development scheme.²⁷

Summary

- 6.89 This chapter of the Study has been prepared by Durlings Chartered Surveyors in order to gain an accurate and up-to-date picture of Tunbridge Wells Town Centre's office market (above 465 sq m), as an update to the 2018 Town Centre Office Market Review. The 2018 work principally considered the impact of new Permitted Development Rights on the office market, allowing conversion of offices to residential use without the requirement for a formal planning application.
- 6.90 Our brief for this updated assessment was to initially consider the effects of the Article 4 directive on protecting the loss of further office accommodation in the town centre. We then went on to update our previous data on the availability of space, potential for new space, losses, and potential further losses.

²⁷ Source: Caxtons, 'Kent Property Market Report', November 2020

6.91 We also provide an updated position of the availability of space in the town centre, and the surrounding areas, to include competing neighbouring towns. Alongside this, we considered the take up of space in the town since the 2018 report, from our firm's records.

6.92 The research carried out revealed the following headline figures:

Table 2.1: Summary of Changes in Office Floorspace

Gains / Losses	sq m
All Office Stock as of January 2018:	44,294
All Office Stock as of September 2020:	47,006
Additional space included in "Town Centre Area" – 77 Mount Ephraim	6,361
Actual implemented loss of office space:	9,910
Office Space gain – implemented	6,261
Net Loss	-3,649*

*after deducting the additional space included at 77 Mount Ephraim

Potential Gains / Losses	sq m
Office space gain – consented (but not implemented):	4,953
Potential loss (PD part J):	3,302
Potential loss (PD part O):	1,504
Potential loss – with Planning Permission	1,409
Net Potential Loss	-1,262

6.93 There has been a reduction in the total space in the town centre – but the pace has slowed.

6.94 Despite the reduction in the total office space since 2018, the decline has slowed, where we had previously experienced a more significant reduction after the introduction of the amended Permitted Development Rights, from 2013-2018.

6.95 With respect to the Article 4 directive, of the space in the study area (including 77 Mt Ephraim) 70% of the total is protected by Article 4. Since our 2018 report, the only building subject to Article 4, which already had PD approval, was Wellington Gate – representing just over 5% of the total square footage protected by Article 4.

- 6.96 Another building to note, which is subject to an Article 4 directive, is 3-5 Lonsdale Gardens which was recently granted planning consent to convert into residential accommodation, although part of this application included a new office building to the rear (No. 1 Vale Avenue), which broadly substitutes the loss of office space in the existing building.
- 6.97 So, in summary the Article 4 directive appears to be making a difference in the retention of important town centre buildings.
- 6.98 Another conclusion from this report is the high percentage of the existing space in the town centre area occupied by a single significant employer in the town – namely AXA. This remains at 20% of the total. Clearly a loss of this occupier would create a devaluation of the current market rent for office space and a wider impact on the local economy.
- 6.99 The take up of space in the town centre remains constant when compared to the previous years. However, the large majority of the space being occupied is sub 465 sq m.
- 6.100 Since January 2018, the availability of space in the Tunbridge Wells Town Centre, and the immediate area, has increased significantly – up to 8 times greater than previously reported in January 2018. At the same time, the competing regional centres have also seen increases in availability – of up to 4 times greater than the previous report.

7.0 Quantitative Capacity Assessment

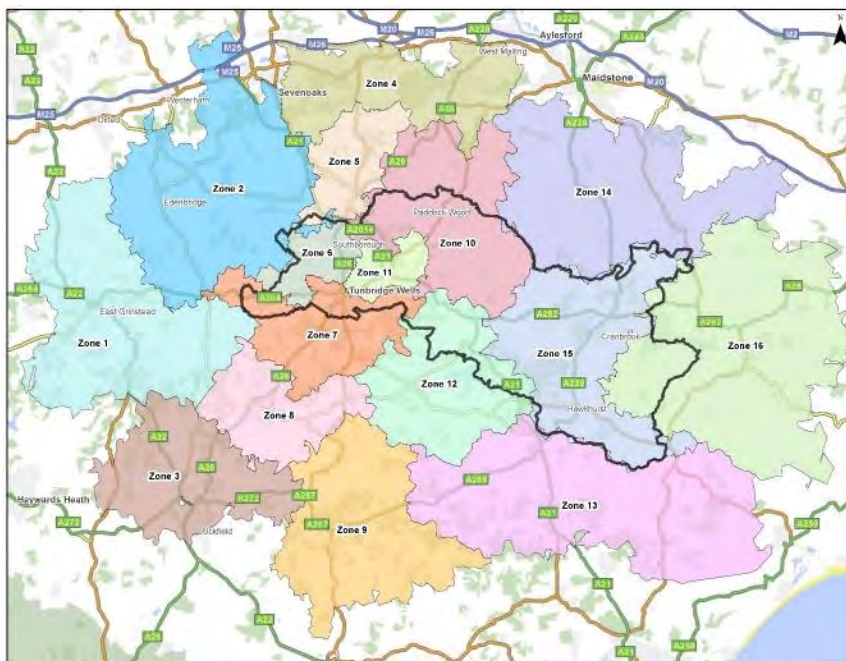
Introduction

- 7.1 Having undertaken a series of stakeholder consultation exercises, our own health check surveys, and reviewed prevailing and forecast market trends to inform the qualitative view of the on-going vitality and viability of the Borough's centres, we now go on to examine the current and forecast population, available convenience goods, comparison goods and leisure expenditure within the Study Area, before moving on to forecast floorspace capacities to 2038.

Study Area and Household Survey

- 7.2 In September 2016, a survey of 1,600 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities. The Study Area was initially drawn by PBA for the purpose of a 2013 survey, and was reviewed by Nexus in collaboration with NEMS Market Research (NEMS) and Council officers to assess if it continues to reflect the catchment area that 'looks' to facilities within Tunbridge Wells Borough to help meet their retail and leisure needs. A plan of the Study Area is provided as Figure 7.1.

Figure 7.1: 2016 Study Area (zonal plan)



- 7.3 We confirm that we consider the Study Area to be sufficiently extensive and that the survey questionnaire is worded in an appropriate manner, such that it provides an accurate representation of shopping and leisure behaviour.
- 7.4 Whilst some time has elapsed since the undertaking of the survey, we do not believe that any changes in provision 'on the ground' in Royal Tunbridge Wells and its surrounding area are of sufficient magnitude that they will likely result in markedly different shopping patterns. As such, we believe that the 2016 survey is able to form an appropriate basis upon which to undertake this Update. The household survey questions and full tabulated responses are provided as part of the 2017 Retail and Leisure Study, Appendix C.
- 7.5 The defined Study Area has been broken down into 16 different survey zones in accordance with postcode sectors in order to gain a comprehensive understanding of respondents' behaviour. The zones are representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour.
- 7.6 The below Table 7.2 sets out the postcode sectors which define each of the zones. The zones were used as the basis for the NEMS household survey and inform the assessment of retail need set out in this chapter.

Table 7.2: Summary of quantitative capacity for new retail floorspace (2017 assessment)

Survey Zone	Postcode Sectors
Zone 1 East Grinstead	RH7 6, RH18 5, RH19 1, RH19 2, RH19 3, RH19 4, TN7 4
Zone 2 Edenbridge	TN8 5, TN8 6, TN8 7, TN11 8, TN13 1, TN14 6
Zone 3 Maresfield	TN22 1, TN22 2, TN22 3, TN22 4
Zone 4 Sevenoaks	ME18 5, ME19 4, ME19 6, TN15 0, TN15 8, TN15 9
Zone 5 Tonbridge	TN9 1, TN9 2, TN10 3, TN10 4, TN11 9
Zone 6 Southborough	TN3 0, TN4 0, TN4 9
Zone 7 Royal Tunbridge Wells (central & south)	TN1 1, TN2 5, TN3 9, TN4 8
Zone 8 Crowborough	TN6 1, TN6 2, TN6 3
Zone 9 Heathfield	TN20 6, TN21 0, TN21 8, TN21 9 101
Zone 10 Paddock Wood	ME18 6, TN11 0, TN12 5, TN12 6, TN12 7, TN12 8
Zone 11 Royal Tunbridge Wells (north)	TN1 2, TN2 3, TN2 4

Zone 12 Wadhurst	TN3 8, TN5 6, TN5 7 100
Zone 13 North Rother	TN19 7, TN31 6, TN32 5
Zone 14 South of Maidstone	ME15 0, ME17 3, ME17 4, TN12 0, TN12 9, TN27 9
Zone 15 Cranbrook & Hawkhurst	TN17 1, TN17 2, TN17 3, TN18 4, TN18 5
Zone 16 Tenterden	TN17 4, TN26 3, TN27 8, TN30 6, TN30 7

Source: Tunbridge Wells Retail and Leisure Study, 2017

- 7.7 The Tunbridge Wells authority area broadly corresponds to Zones 6, 7, 10, 11 and 15. Zones 12 and 16 are partly within Tunbridge Wells Borough, but main population centres are located within a neighbouring local authority area.
- 7.8 Further details in relation to shopping patterns across the Borough and the market shares achieved by individual facilities are set out at Chapter 6 of the 2017 Tunbridge Wells Retail and Leisure Study and summarised at Figure 7.3 below.

Figure 7.3: All Retail - 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	19.5	13.3	18.2	43.3	32.5	43.6	40.4	42.6	45.6	36.4	41.1	41.8	32.3
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	3.2	3.1	3.2	0.5	0.5	0.4	1.0	0.5	0.2	1.1	1.4	0.7	1.7
Cranbrook	1.2	2.6	1.5	0.2	0.0	0.3	0.4	0.4	1.2	0.8	1.0	0.5	0.9
Hawkhurst	1.7	1.8	1.7	0.0	0.3	0.0	0.0	0.0	0.5	0.2	0.1	0.1	0.7
Others in Tunbridge Wells	0.5	5.8	1.6	0.1	0.6	0.4	0.1	0.4	0.2	2.1	1.2	0.5	0.9
Tunbridge Wells Sub-Total	26.5	28.5	26.9	44.2	33.8	44.8	41.9	43.9	47.6	40.6	45.1	43.6	36.9
Others in Study Area	47.0	57.4	49.1	12.8	38.0	15.2	24.1	15.0	17.0	33.0	24.7	19.7	31.5
Outside the Study Area	26.6	14.1	24.0	43.0	28.3	40.0	34.0	41.1	35.5	26.4	30.2	36.7	31.6
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

Source: Appendix D

Study Area Population

- 7.9 The population within each postcode sector and each zone at 2021 has been calculated using Experian Micromarketer G3 data (2019 estimate). Experian also models projected future increases in population, utilising Government population projections. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 7.10 Experian's data provides 2019 base year population estimates which accord with the findings of the 2011 Census release. Its methodology in calculating projected changes in population is based on a 'demographic component model', which takes into consideration birth and death rates, and net migration. Population growth (and available expenditure) has been calculated at five-year reporting intervals across 2021, 2026, 2031, and 2038.
- 7.11 We set out Experian's population projections across each zone and each reporting period over the page at Table 7.4.
- 7.12 The table indicates that the Study Area population is projected to increase from 446,564 at 2021 to 492,219 at 2038, equating to an increase in population of 45,655 persons (10.2%). Within Zones 6, 7, 10, 11 and 15 — which broadly accord to the Royal Tunbridge Wells administrative boundary — the forecast population increases from 130,183 at 2021 to 138,336 at 2038. This equates to a forecast population increase of 8,153 persons over the 17-year period (equating to an increase of 6.3%).

Table 7.4: Study Area Population by Survey Zone

Zones	2021	2026	2031	2038
Zone 1 East Grinstead	53,280	55,395	57,160	59,204
Zone 2 Edenbridge	28,210	29,121	29,910	30,896
Zone 3 Maresfield	19,348	20,256	21,133	22,157
Zone 4 Sevenoaks	34,774	36,258	37,541	39,051
Zone 5 Tonbridge	43,550	44,875	46,009	47,498
Zone 6 Southborough	29,078	29,584	30,070	30,918
Zone 7 Royal Tunbridge Wells (central & south)	27,968	28,549	29,027	29,718
Zone 8 Crowborough	26,256	27,458	28,511	29,790

Zone 9 Heathfield	21,331	22,334	23,133	24,179
Zone 10 Paddock Wood	27,054	27,683	28,251	29,061
Zone 11 Royal Tunbridge Wells (north)	27,666	28,167	28,607	29,275
Zone 12 Wadhurst	11,160	11,776	12,309	12,948
Zone 13 North Rother	17,989	19,008	19,922	21,062
Zone 14 South of Maidstone	36,424	38,016	39,381	40,976
Zone 15 Cranbrook & Hawkhurst	18,417	18,723	18,975	19,364
Zone 16 Tenterden	24,059	24,857	25,518	26,122
Total	446,564	462,060	475,457	492,219

Source: Appendix D, Table 1

Retail Expenditure Forecasts

- 7.13 Retail expenditure data (in the form of convenience and comparison goods expenditure per capita) has also been sourced from our in-house Experian MicroMarketer G3 system. The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Expenditure data from Experian is provided in 2018 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 18 (October 2020).
- 7.14 As identified in Figure 7.5, Experian forecasts suggest that convenience goods expenditure will grow by just 1.0% in 2018, falling over the next few years before levelling off to a very conservative average of 0.0% per annum over the period 2022-2031. This is largely as a result of a trend towards more price conscious shopping patterns, a response to social distancing measures and the ongoing growth of high street discounters such as Lidl and Aldi. Comparison expenditure is shown to have risen by 3.4% in 2018, rising to 4.3% in 2019, before falling to a negative rate of -8.5% in 2020 as weakened incomes, consumer confidence and social distancing (both enforced and voluntary) weighs on consumer spending.
- 7.15 A recovery is expected to emerge as restrictions unwind over the course of 2021, with Experian forecasting a levelling off of steady growth at 2.8%-2.9% per annum over the period 2024-2031, as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.

Figure 7.5: Experian Retail Expenditure Forecasts

Year	Convenience growth rates	Comparison growth rates
2018	1.0%	3.4%
2019	-0.9%	4.3%
2020	8.4%	-8.5%
2021	-6.2%	6.5%
2022	0.2%	3.8%
2023	0.0%	3.6%
2024	0.1%	2.9%
2025	0.1%	2.8%
2026	0.0%	2.9%
2027	-0.1%	2.9%
2028	0.0%	2.8%
2029	0.0%	2.9%
2030	-0.1%	2.9%
2031	0.0%	2.9%
2032	0.0%	2.9%
2033	0.1%	2.9%
2034	0.1%	2.9%
2035	0.1%	2.9%
2036	0.1%	2.9%
2037	0.1%	2.9%
2038*	0.1%	2.9%

Source: Table 1a, Experian Retail Planner Briefing Note 18, October 2020

*Projected forward

- 7.16 Experian note that long-term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can influence the broader national economy, particularly in the current circumstances. These forecasts relate only to the growth in expenditure at 'bricks and mortar' premises. We deal separately with the internet (or 'special forms of trading') below.

Non-Store Retailing or Special Forms of Trading

- 7.17 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.
- 7.18 Experian Retail Planner Briefing Note 18 (October 2020) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents suggest is made by SFT and instead utilise Experian's forecasts. This ensures that the proportion of SFT accounted for

in our modelling increases in line with Experian forecasts, as opposed to remaining constant.

- 7.19 Many brands offer online sales, but source goods from regular stores' stock, as is often the case for foodstores where employees will pick online orders from stores' shelves before, during or after opening hours. These orders are then delivered by dedicated vans at each store and as such, the online expenditure is attributed to tangible stores. Experian provides 'adjusted' Figures, cited at Figure 7.6, which make an allowance for these online sales derived from individual stores to ensure that the expenditure is counted as 'available' spend within the Study Area.

Figure 7.6: 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Adjusted Convenience SFT	Adjusted Comparison SFT
2021	5.4%	21.8%
2026	6.3%	25.2%
2031	6.9%	27.2%
2038	7.3%	28.5%

Source: Experian Retail Planner Briefing Note 18, October 2020, Appendix 3

Convenience Goods Expenditure

- 7.20 We then project forward available expenditure per capita and population growth for each survey Zone in 2021, 2026, 2031, and 2038 in order to estimate the total available convenience goods expenditure under each growth scenario.
- 7.21 In Figure 7.7 we consider the convenience goods expenditure generated by residents of the Study Area.

Figure 7.7: Total Available Convenience Goods Expenditure

2021	2026	2031	2038	Growth 2021-2038
£1,116.2m	£1,148.3m	£1,173.5m	£1,232.2m	£116.0m

Source: Appendix D, Table 2a

- 7.22 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with 75% of spending attributed to main food shopping trips and 25% attributed to 'top-up' shopping trips.

Comparison Goods Expenditure

- 7.23 Experian provides comparison goods expenditure divided into eight sub-categories to allow for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.

Figure 7.8: Total Available Comparison Goods Expenditure

2021	2026	2031	2038	Growth 2021-2038
£2,061.4m	£2,390.4m	£2,764.6m	£3,439.5m	£1,378.1m

Source: Appendix D, Table 8

- 7.24 Applying the increases in population and comparison goods expenditure per capita, Figure 7.8 estimates that the Study Area will experience increases in spend of over £1,000m across the period 2021-2038.

Convenience Goods Findings

- 7.25 Our base population and expenditure data is then utilised, in conjunction with our previous analysis of the market shares of retailers across the Study Area, to inform our analysis of retail and leisure expenditure capacity.
- 7.26 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the Plan period to 2038. The use of long-term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such national example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013, whilst international factors include Brexit and Covid-19, which will have obvious impacts on economic forecasting.
- 7.27 Importantly, we also note that any quantitative retail capacity that we may identify across the Study Area does not necessarily equate to justification for new retail floorspace in itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with the

Tunbridge Wells Local Plan and NPPF policies in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection.

7.28 Equally, the converse also applies and a lack of identified capacity should not specifically rule out retail developments, where other material factors support such development.

7.29 Detailed quantitative retail capacity tables are enclosed at Tables 6a-6d of **Appendix D**.

7.30 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions which we describe further below, but broadly speaking:

$$\text{Available Expenditure (£m)} - \text{Turnover of existing \& proposed (£m)} = \text{Surplus or Deficit (£m)}$$

7.31 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards based on population growth, changes in expenditure over time, and Special Forms of Trading (SFT) such as internet shopping. All of these inputs have been described earlier in this chapter.

7.32 We make a number of statistical assumptions through the quantitative capacity exercise in order to account for the following variables. These are contained at **Appendix D** and can be summarised as:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores so that only the convenience goods floorspace is being considered (i.e. on a like-for-like basis with available convenience expenditure). These deductions are made in line with floorspace figures sourced from publically available databases or, where data is not available, Nexus' professional judgement based on site visits.
- We also make assumptions as to the gross to net convenience goods sales floorspace of each store, again utilising online planning records where available, national rates databases or Nexus' professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. As with the 2017 Study, given the widespread nature of the Study Area, and absence of any significant inflows from the peripheral zones, we have only assumed that convenience retailers would attract minimal inflow from outside the Study Area and that their

turnover is generated entirely from residents within the Study Area.

- 7.33 We then calculate the anticipated turnover of all major convenience goods operators based on the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre). By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under-trading) company averages.
- 7.34 The results show that there is a cumulative overtrade of convenience goods facilities within designated centres of around £11.2m per annum, a significant proportion of which is attributable to the strong performance of the Waitrose, Church Road in Paddock Wood. In keeping with NPPF policy on 'town centres first', and the consistent market share across both the 2016 household telephone survey and the earlier 2013 survey, we have adopted the approach of assuming that all stores within identified centres that trade above company average will continue to do so, without having any of their 'over-trade' set aside to support new retail floorspace.
- 7.35 In taking this approach, we have carefully assessed existing town centre stores for any significant issues with their over-trading and find that none are severe (e.g. consistent instances of queuing around stores, or a lack of car parking spaces). This is corroborated by the qualitative questions in the stakeholder engagement, which did not point towards any significant degree of dissatisfaction amongst convenience goods shoppers. We therefore consider this to be a robust approach.
- 7.36 For stores located outside of designated town centres, surplus expenditure over and above benchmark turnover of £99.3m per annum, with the out-of-centre Sainsbury's (Linden Park Road) and Tesco (Woodsgate Corner) performing particularly well against benchmarks. This surplus is considered to be available, as this suggests that these existing convenience goods providers in the Study Area may be overproviding to meet the existing need.
- 7.37 The surplus or deficit that subsequently results from these calculations equates to the difference between the available retail expenditure across the Borough and the turnover of existing facilities within the Borough. If the total turnover is greater than the available expenditure, then the model would identify an oversupply of existing retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

- 7.38 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented as a range representing various retailers. For example, discount retailers (such as Lidl and Aldi amongst others) continue to operate at a lower sales density than the 'big 4' (Sainsbury's, Tesco, Asda, and Morrisons). Given the same available 'pot of expenditure', a higher sales density would result in a lower floorspace capacity than a lower sales density, which would result in a higher floorspace capacity.
- 7.39 Turning now to our detailed findings for Tunbridge Wells Borough, the 2016 household survey showed where Study Area residents carry out their convenience goods spending, identifying that 27.0% of all Study Area residents' spending is carried out within Tunbridge Wells Borough.
- 7.40 In keeping with standard retail study methodology, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores across the Borough will continue to draw 27.0% of all convenience goods spending from the Study Area). We consider maintaining a constant market share a sensible basis for analysis because whilst there is planned population growth and committed developments in Tunbridge Wells, we would expect a range of competing centres such as Maidstone, East Grinstead and Ashford (amongst others), to continue to exert a pull on residents of the hinterlands surrounding Tunbridge Wells. We expect the two factors to broadly even each other out.
- 7.41 Based on a constant market share, we then allow for growth in retail expenditure over the period to 2038, as well as utilising data provided within the latest Experian Retail Planner Briefing Note 18, in order to take account of forecast growth in retail efficiencies (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the Plan period, as the rise of food discounting continues to subdue the projected efficiencies in turnover of existing convenience retail floorspace.
- 7.42 Based on the household survey, we identify in Tables 3-5 of **Appendix D** that convenience retailers in the Borough turnover an estimated £301.0m at 2021. This turnover exceeds the expected benchmark trading performance of stores in the Study Area (£190.4m) and, accounting for overtrading within designated centres (£11.2m), we therefore identify a surplus of expenditure in

Table 6a (£99.3m at 2021).

- 7.43 We then factor in population and convenience goods expenditure growth rates, as well as sales densities on existing floorspace, to project forwards that surplus expenditure to 2038.
- 7.44 As previously noted, convenience goods growth rates are largely forecast to plateau over the coming years, and so growth is marginal, arising largely from population growth.
- 7.45 Figures 7.9 sets out the resultant surplus convenience goods expenditure at each assessment date.

Figure 7.9: Total Available Comparison Goods Expenditure

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Designated Centre Overtrading (£m)	Surplus Expenditure (£m)
2021	190.4	301.0	11.2	99.3
2026	192.0	309.6	11.3	106.3
2031	192.0	316.4	11.3	113.1
2038	192.0	332.2	11.3	129.0

Source: Appendix D, Table 6a

- 7.46 We then go on to consider committed and extant permissions for new convenience retail floorspace across Tunbridge Wells Borough which could come forward over the next few years.
- 7.47 This includes any developments that have not been built, are currently under construction, or have opened or gained planning permission since 2016, and so would not have been operating at the time of the household survey. We do not take into account proposed allocations for retail floorspace that do not benefit from extant and implementable permission over the Plan period, and disregard permissions that are not likely to come forward in their present form. Our assumptions are based on discussions with planning officers, company statements and media reports.
- 7.48 In total, these committed developments equate to a net convenience floorspace of 5,110 sq m and an estimated turnover of £60.3m (**Appendix D**, Table 6c) at 2021. The largest commitment is the Aldi at the former Toys R Us unit on Greta Lodge Retail Park, measuring 2,006 sq m net, with an estimated turnover of £21.7m at 2021.
- 7.49 We also note the currently operating Waitrose on Rye Road in Hawkhurst (and the corresponding loss of the previous Budgens store), which began trading in September 2016 before the household

survey had been carried out, with its 1,093 sq m net of retail floorspace equating to £15.0m of estimated turnover.

- 7.50 Taking account of committed turnover, we identify a residual expenditure of £39.0m at 2021, rising to £68.2m by 2038. A significant proportion of this residual expenditure is made up from the over-trade at existing out-of-centre stores in the earlier years of the assessment, though over time, population and expenditure growth become more of a factor.
- 7.51 Using average sales densities to calculate a minimum floorspace scenario (a large supermarket operator) and a maximum floorspace scenario (a combination of discount foodstores operators), we calculate the net additional convenience goods capacity for Tunbridge Wells Borough, as follows:

Figure 7.10: Net quantitative 'capacity' for new convenience goods facilities in Tunbridge Wells

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2021	99.3	60.3	39.0	3,100	5,400
2026	106.3	60.8	45.6	3,500	6,200
2031	113.1	60.8	52.4	4,100	7,100
2038	129.0	60.8	68.2	5,300	9,300

Source: Appendix D, Table 6d

- 7.52 This quantitative capacity is calculated to grow from between 3,100 sq m and 5,400 sq m at 2021 to between 3,500 sq m and 6,200 sq m at 2026. Over the plan period, this capacity continues to rise to between 4,100 sq m and 7,100 sq m by 2031 and between 5,300 sq m and 9,300 sq m by 2038.
- 7.53 In purely quantitative terms, this capacity is considered to be sufficient to support the provision of new convenience retail floorspace over the plan period. Notwithstanding this headline conclusion, we consider in the following chapter whether it is desirable to bring forward new convenience goods floorspace within the Plan period, and if so, where that floorspace might most be needed.

Comparison Goods Findings

- 7.54 Turning to consider comparison goods, we model market shares and spending patterns across the range of categories defined by Experian. These eight categories cover all ranges of bulky and non-bulky items.

- 7.55 The full results of our market shares analysis are set out at Tables 7-26 of **Appendix D**, and summarised at Figure 7.3 above.
- 7.56 In summary, the assessment of overall comparison goods spend by residents across the Study Area shows that destinations in Tunbridge Wells Borough account for 43.4% (£894.8m) of the spending of all Study Area residents at 2021 (£2,061.5m per annum). The remaining 56.6% of spending carried out by residents of the Study Area is spent in destinations beyond Tunbridge Wells.
- 7.57 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that sales densities are published for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are more likely to link multiple comparison goods trips to retailers in close proximity).
- 7.58 As such, we adopt a standard approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2021, meaning that we adopt the survey derived turnover of each facility, and examine capacity by measuring the growth in available expenditure to 2038.
- 7.59 For the purposes of our assessment, we have assumed that the Borough's attraction to Study Area residents will remain constant at 43.4% of all comparison goods spending. Based on the relative scale and location of planned population growth within Tunbridge Wells, as well as the balance of committed developments both in the Borough and outside of it, we consider this a robust basis for analysis. We therefore apply a constant market share basis to our assessment.

Figure 7.11: Total Available Comparison Goods Expenditure

Year	Benchmark Turnover (£m)	Survey Turnover (£m)	Inflow (£m)	Surplus Expenditure (£m)
2021	922.2	894.8	27.4	0.0
2026	1,084.6	1,037.6	31.7	-15.3
2031	1,237.9	1,200.0	36.7	-1.2
2038	1,481.6	1,492.9	45.7	57.0

Source: Appendix D, Table 26a

- 7.60 We then consider committed and extant planning permissions for new comparison goods retail floorspace across Tunbridge Wells Borough that are likely to come forward over the next few years. This includes any developments that are currently under construction, or have opened or been granted planning permission since the time of the 2016 household survey. In the same way as we viewed convenience goods, we do not take into account proposed allocations for retail floorspace that do not benefit from extant and implementable permission over the Plan period. Equally, we do not incorporate permissions that are not likely to come forward in the scale and format approved, such as the approval for a significant retail expansion at Royal Victoria Place, which we understand is currently undergoing an internal review ahead of a revised application that will likely comprise far less additional retail floorspace over and above the existing provision (if any at all).
- 7.61 In total, these committed developments equate to a net comparison goods floorspace of 8,315 sq m and an estimated turnover of £41.6m at 2021 (see Table 26c at **Appendix D**). This includes both The Range on Vale Road in Royal Tunbridge Wells and the Longfield Road Retail Park (Wickes and Tapi carpets), both of which have begun operating since the 2016 household survey and are estimated to be generating a 2021 turnover of £11.7m and £16.0m, respectively.
- 7.62 These commitments are then deducted from the surplus expenditure set out in Figure 7.12. Once accounted for, we are able to calculate the net comparison goods capacity.

Figure 7.12: Net quantitative 'capacity' for new comparison goods facilities in Tunbridge Wells

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min	Max
2021	0.0	41.6	-41.6	-7,600	-11,900
2026	-15.3	48.9	-64.2	-10,600	-16,600
2031	-1.2	55.8	-57.0	-8,000	-12,600
2038	57.0	66.8	-9.8	-1,000	-1,600

Source: Appendix D, Table 26d

- 7.63 The forecast shows that commitments and spending at existing facilities entirely absorb the available residual expenditure for new comparison goods retail floorspace (see Table 26d of Appendix D), and we go on to identify a negative residual expenditure, over the entirety of the plan period to 2038.
- 7.64 Negative capacities are shown into the future as, despite the forecast growth in population (and associated increases in available 'survey' spending), the projected increases associated with the

turnover of the planned comparison facilities and those built out since the 2016 household survey significantly exceed the amount of expenditure growth.

Planned Urban Extensions

- 7.65 The capacity assessment undertaken for this study has been on a 'global, or Borough-wide basis. This differs somewhat from the more granular approach taken across the 2017 study, which sought to consider the location of both convenience and comparison floorspace capacity, sub-divided between the Borough's five key centres on the basis of the available expenditure and current market shares from the resident population of the Study Area.
- 7.66 This updated assessment of quantitative capacity for new retail floorspace has not sought to assign capacity (where available) on a centre-by-centre basis for a number of key reasons:
- The planned allocation for urban extensions at Tudeley Village and Paddock Wood will not necessarily reflect current shopping patterns. Whilst Royal Tunbridge Well and the Borough's other key designated centres will remain resident's primary retail offer over the plan period, attracting a significant proportion of spending from new residents, the scale of the projected changes in population distribution suggest that it would not be suitable for an assessment to make the assumption that future shopping patterns will reflect current market shares to the same degree.
 - Any allocation for new floorspace should respond to an identified need, which takes into account both quantitative capacity findings (statistical assessment of surplus available expenditure that 'could' support new retail floorspace) and qualitative capacity findings (assessment of vitality and viability, including the need to meet a specific deficiency or address significant issues with overtrading such as queuing around stores, or a lack of car parking spaces). It is important to note the benefits associated with surplus expenditure supporting new entrants reoccupying vacant units within existing centres, as well as existing retailers that may be struggling in the current climate (particularly in light of the operational difficulties posed by Covid-19).
 - Deliverability of allocations over the plan period in light of the current operator and developer market for new retail floorspace, as summarised in detail in Chapter 3.

- 7.67 As previously referenced, the Council is planning for the development of a new settlement at Tudeley Village (of approximately 2,800 homes; 2,100 of which are to be provided over the plan period), as well as an urban extension to Paddock Wood (of approximately 3,450 homes) against the principles of garden communities to assist in meeting the Borough's growing population requirements.
- 7.68 During the undertaking of this Study, the project team has liaised with the consultants progressing the masterplanning work for the emerging settlements, providing insight from our own assessments as well as from stakeholder engagement.
- 7.69 We have gone on to undertake a standalone model of the anticipated quantum of retail floorspace that each projected population could support to cater to the day-to-day needs of the emerging communities by 2038, as summarised across Figures 7.13 and 7.14 below.
- 7.70 The wider capacity assessment presented earlier in this chapter was undertaken on the basis of population projections that incorporate the projected population increases associated with the proposed development of the urban extensions at Tudeley Village and Paddock Wood.
- 7.71 We began by taking account of the broad population increases associated with the housing to be provided across each of the proposed settlements. Taking the convenience and comparison expenditure per capita data for the zones in which the urban extensions are to be located (Experian MMG3), we are able to calculate the total available convenience and comparison goods expenditure generated by the new populations of each of the proposed urban extensions.
- 7.72 The total available expenditure is then applied to suitable sales densities to establish the total amount of convenience and comparison retail (expressed in terms of floorspace) that could be supported by each urban extension, if retention was 100% and residents only shopped within the local retail facilities.
- 7.73 We then go on to apply an assumption that 50% of the convenience expenditure of new residents is spent at the new retail facilities within the settlements, and that 20% of comparison goods spending is retained by local retail facilities to account for purchases of day to day comparison goods, while higher order goods would be expected to be purchased from larger surrounding town centres.

Figure 7.13: Estimated 'capacity' for new retail facilities in Tudeley Village (Draft Local Plan Allocation AL/CA 1)

	New Households Proposed	Household Size (2038)	Population (2038)	Expenditure per Capita at Zone 10 (2038) (£)	Additional Expenditure (2038) (£m)	Retention rate (%)	Residual Expenditure (2038) (£m)	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

Source: Appendix D, Table 31

Figure 7.14: Estimated 'capacity' for new retail facilities at Land at Capel & Paddock Wood (Draft Local Plan Allocation AL/CA 3)

	New Households Proposed	Household Size (2038)	Population (2038)	Expenditure per Capita at Zone 10 (2038) (£)	Additional Expenditure (2038) (£m)	Retention rate (%)	Residual Expenditure (2038) (£m)	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

Source: Appendix D, Table 32

- 7.74 In each case, we identify capacity to support new retail floorspace, which would traditionally be distributed in smaller units of 200 sq m to 500 sq m such as a butcher, green grocer or baker (convenience) and a pharmacy, a crafts/ gift shop, a florist (comparison) alongside a mix of services and other key infrastructure across 2-3 local centres within the settlements in accordance with recommendations development through the masterplanning exercise. It is also important to note (with specific regard to the flexibility offered by Use Class E) that our analysis relates purely to retail provision, and that neighbourhood centres may also seek to provide a comparable amount of associated leisure and retail services to support local residents.
- 7.75 For Tudeley Village, we find that the anticipated 2,800 new homes could support a range of between 1,100 sq m to 1,900 sq m of additional convenience floorspace, and between 700 sq m and 1,000 sq m of additional comparison goods floorspace by 2038. However, this range should serve as a guide to the retail element of the planned allocations rather than a fundamental limit on acceptable development of neighbourhood centres, which will be informed by masterplanning exercises.
- 7.76 Whilst Tudeley Village is strategically located between Paddock Wood and Tonbridge, and residents would partly be served by existing facilities in each of these higher order centres, it is desirable for the new settlement to be somewhat self-sustaining (noting the sustainable transportation principles

of garden communities).

- 7.77 Equally, given the identified quantitative capacity for new convenience floorspace in the Borough, the Council should consider the relative merits of proposals for new retail developments that come forward during the development of the masterplan. Developments greater than the identified capacity in Figure 7.13 have the potential to further support residents of the new settlement, where it can be demonstrated that the proposals would not detract from the vitality and viability of the surrounding centres.
- 7.78 In terms of Paddock Wood, we identify capacity for new residents to support between 1,400 sq m and 2,400 sq m of new convenience retail floorspace, and between 800 sq m and 1,300 sq m of new comparison goods floorspace by 2038. As with our assessment of Tudeley Village, this level of floorspace can be interpreted flexibly subject to market demand and retailer interest.
- 7.79 It is envisaged that Paddock Wood Town Centre will continue to function as the primary retail and leisure destination for the planned urban extension, serving new residents, who would in turn provide additional expenditure that would strengthen the vitality and viability of the town centre in accordance with local and national planning policy objectives.
- 7.80 However, given the relatively constrained nature of Paddock Wood Town Centre, and the lack of suitable locations to facilitate new retail floorspace to meet additional day-to-day spending, it may be desirable to provide new floorspace as a larger convenience retailer anchoring a neighbourhood centre (such as Sainsbury's local, Aldi or Lidl) rather than a series of smaller units. Beyond an anchor retailer, the Council may wish to limit the maximum sizes of other units to ensure that they retain a local and neighbourhood function and offer.
- 7.81 However, it is important that the above figures are not interpreted as a 'cap' on development as there is no test of 'need' set out in the NPPF or the adopted Local Plan. Instead, future development proposals should be assessed against the relevant policies of the NPPF and the development plan.
- 7.82 Given the planned nature of the allocations, the Council may also wish to explore the merits of restrictive conditions restricting the change of use within Class E of sites specifically identified for a retail anchor, as well as the evidence for targeted Article 4 directives, subject to the Government's emerging legislation setting out the applicable Permitted Development Rights.

8.0 Recommendations

Introduction

- 8.1 This Study has been commissioned as an update of the recommendations of the Council's previous Retail and Leisure Study (Nexus, 2017) and Town Centre Office Market Review (Durlings, 2018), as well as to consider the suitability and deliverability of the Council's draft allocations, taking account of a wider range of suitable town centre uses that were beyond the scope of the initial studies.
- 8.2 This will form part of the evidence base to support Tunbridge Wells Borough Council's emerging Local Plan in accordance with national policy requirements. Specifically, Paragraph 85 of the NPPF indicates that local planning authorities should:
- a. define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - b. define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - c. retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - d. allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - e. where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
 - f. recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 8.3 In addition, Paragraph 89 of the NPPF indicates that local planning authorities may set their own local threshold for retail, leisure and office developments outside of town centres for which an impact

assessment would be required.

8.4 Our study has been informed by a market assessment of town centre uses and analysis of the capacity for additional retail, commercial and office town centre developments, as well as a review of the vitality and viability of Royal Tunbridge Wells and the Borough's key centres, informed by detailed stakeholder engagement and public consultation.

8.5 In this chapter we bring together some of these findings to advise on the following:

- Overview of suggested policy approaches for the Council's future strategy for the key centres; and
- Advice on key allocations and development opportunities, including key priorities.

Summary of Capacity for Additional Town Centre Uses

8.6 Our assessment of convenience goods identified capacity for between 3,100 sq m and 5,400 sq m at 2021, growing to between 5,300 sq m and 9,300 sq m by 2038. In comparison goods terms, we do not identify capacity (either qualitative or quantitative) for additional floorspace over the plan period.

8.7 However, as we have previously noted, capacity does not equate to need. Need is more than just a quantitative measure; it should also involve qualitative considerations around issues such as any residents' dissatisfaction with the current level of provision, and the potential impacts of realising capacities on the ground from our health check work and stakeholder engagement. Fundamentally, capacity modelling should not be seen as an absolute; it is a guide to a Plan-led approach.

8.8 Not only did local agents suggest that there was sufficient space available at present to meet current levels of operator demand, but responses from the public surveys identified that the number of vacant units, general upkeep and investment in existing units and undeveloped sites detracted from the overall appeal of Royal Tunbridge Wells.

8.9 The retail market has seen an overall reduction in operator demand in recent years, which reflects the national overprovision of comparison goods floorspace and limited take up of new convenience goods floorspace, the majority of activity being centred around discounters such as Aldi and Lidl, and smaller independent developments.

9.1 As such, whilst we have identified a quantitative capacity for new convenience goods floorspace, we

do not consider there to be a distinct need, particularly one that would specifically justify out-of-centre allocations at this stage. The identified floorspace capacity should be used to bolster existing or proposed stores within existing centres in the retail hierarchy, particularly given the 17,500 sq m of existing vacant retail floorspace identified in Royal Tunbridge Wells Town Centre.

- 8.10 In terms of the planned urban expansions at Tudeley Village and Paddock Wood, we have undertaken standalone modelling of the amount of retail floorspace that each projected population could support, and identify quantitative capacity for retail allocations as part of dedicated local neighbourhood centres developed within the urban expansions. It is important to clarify that any neighbourhood centre would be expected to provide leisure and retail services in addition to any dedicated retail floorspace.
- 8.11 Given the likely scale of spending forecast, we would suggest that each of Tudeley Village and Paddock Wood could facilitate a limited number of small retail units as part of 2-3 local centres designed to support new residents' day-to-day shopping needs. However, this range should serve as a guide to the planned allocations rather than a fundamental limit on acceptable retail development. Should an operator express an interest in developing a larger retail store, the proposal should be assessed against the relevant policies of the NPPF and the development plan through a retail impact assessment and sequential test.
- 8.12 In terms of the wider commercial market, both demand and supply for food and beverage facilities (including restaurants, bars and cafes) have been suppressed in recent years following a series of economic difficulties impacting the sector, from Brexit to Covid-19. Nonetheless, whilst demand for traditional national multiples and family-style eateries has been falling, there have been pockets of success where operators focus on innovation, experience and convenience. This is best demonstrated in Royal Tunbridge Wells in the pop-up style food stalls and temporary bars at Central Market.
- 8.13 Equally, the recent reform of the Use Class order, introducing a significant degree of flexibility for landlords and operators has yet to take hold and will increase the options for new entrants in to the market who may have been discouraged from occupying a vacant unit by the perceived 'planning risk'.
- 8.14 In the circumstances, we do not consider there to be a specific need for the Council to allocate new food and beverage floorspace, despite the perceived lack of provision in the centre. Instead, we would

suggest supporting a flexible approach (as set out in the Use Class reforms) for developments within the town centre to encourage such uses reoccupying long-term retail vacancies and as part of the comprehensive redevelopment of various town centre sites.

- 8.15 Health and fitness facilities have become an increasing fixture in town centres, particularly those providing a no-frills 24-hour service, providing a significant draw to local residents. Whilst usage is currently depressed due to Covid-19 related social distancing measures and operators are at risk of failing, this is considered to be a short-term problem. There is not considered to be any specific need to plan for or allocate additional health and fitness facilities in the town centre over the plan period.
- 8.16 Another leisure service highly relevant to Royal Tunbridge Wells Town Centre are theatres and cinemas, with consent for a new cinema at the former ABC Cinema site, proposals for a cinema as part of the redevelopment of Royal Victoria Place Shopping Centre, and a new theatre planned as part of the Calverley Square development. However, the specific proposals for each of these opportunity sites has stalled or been shelved over the past few years.
- 8.17 Whilst usage and demand for facilities in the Borough remains high (with agents noting particular demand for a bespoke cinema operator such as Everyman), the value of such uses is primarily through the linked trips and increased footfall that they draw to larger mixed-use schemes, particularly in town centres. The difficulty in balancing the upfront costs and long-term viability can often jeopardise schemes that cannot make up the value on other uses in a scheme. Whilst town centre allocations for new cinema and theatre floorspace remain desirable (if not necessary), viability and deliverability remains challenging.
- 8.18 Turning to the office market, we identify a reduction in the total quantum of office space in Royal Tunbridge Wells Town Centre, but note that the pace of change has slowed since the 2018 assessment. We have also identified a relatively significant increase in the availability of office floorspace over 5,000 sq ft since 2018, with a less pronounced increase in the surrounding region. This indicates that the introduction of various Article 4 Directives has been successful in protecting uses from conversion, and increasing the amount of floorspace available for new operators.
- 8.19 However, broadly 90% of enquiries for new floorspace are for space under 465 sq m. Despite a slowdown associated with the Covid-19 pandemic, demand for flexible workspace in particular is expected to continue to grow to support demand from local SME businesses with smaller

employment bases. This type of space is most-often delivered in existing office buildings rather than occupying purpose-built space, a trend we anticipate will continue in the likely absence of demand from larger operators to relocate to Tunbridge Wells due to the existing transport infrastructure.

8.20 As such, the key balance for the Council will be to encourage the repurposing of available larger floorplate offices to facilitate flexible offices and co-working spaces. This may include the overall loss of floorspace, where it can be demonstrated that the overall quality and desirability can be increased.

8.21 Finally, we note the significant potential for town centre living through the provision of residential accommodation in Royal Tunbridge Wells. This is demonstrated across tenures, including market housing (both high-density blocks over the long-term and consistent demand for larger family-units with private amenity space), later living and care homes, and purpose built private rental accommodation. The introduction of 'indigenous footfall' through a vibrant and engaged town centre population provides a key opportunity to increase the demand for new operators across a variety of town centre uses.

Royal Tunbridge Wells SWOT Analysis

8.22 In this section, we bring together the findings described in the preceding sections, and set out what we consider to be the key issues facing Royal Tunbridge Wells Town Centre over the coming Plan period. We approach this exercise by devising a 20-point strengths, weaknesses, opportunities and threats exercise, which we then utilise to orchestrate a key priorities action list.

Strengths	Weaknesses	Threats	Opportunities
1. Retail Offer			
Mix of retailers including department stores, national multiples and independents at The Pantiles.	High vacant rate. Customer concern about a lack of choice.	Growing trend towards smaller footprint stores preferred over larger footprint stores. Likely reduction in number of bricks and mortar stores due to internet trading.	Embrace managed contraction of retail, smaller unit footprints to disaggregate larger units and encourage smaller start-ups.

2. Vacant Units			
Areas attracting higher occupancies, such as The Pantiles and High Street.	Clusters of vacant units and 'dead runs', particularly to the north of the centre and Royal Victoria Place Shopping Centre.	Clusters of vacant units may hinder attracting investment across the Town Centre as a whole.	<p>Re-purposing of the large vacant units through disaggregation in the medium-term, and any opportunities for 'pop-up' shops in the meantime.</p> <p>Also consider alternative use classes for community use, leisure and/or residential occupation.</p>
3. Culture & Leisure			
<p>Strong mix of quality dining options, a number of which complement the character of The Pantiles.</p> <p>Engaged local stakeholder groups.</p> <p>The recent development of The Amelia Scott Cultural and Learning Hub (museum, library and art gallery).</p>	<p>Lower than UK average provision of restaurants and bars, meaning areas of the centre are largely redundant outside of shopping hours.</p> <p>Lack of other cultural and leisure destinations (cinema / sport/ art facilities).</p>	If the Town Centre does not further evolve to become a 24-hour Town Centre, then it will not attract increased numbers of residential occupants – this is seen as one of the key aspects in attracting suitable F&B operators and increasing footfall to maintain the vitality and viability of town centres in the future.	Consider a dedicated Culture & Leisure strategy, to build upon the development of The Amelia Scott Cultural and Learning Hub and support the centre by encouraging consistent opening hours, local community involvement and public events.
4. Unhealthy Businesses			
The health checks and stakeholder engagement did not indicate any significant concerns with an over-proliferation of take-away or gambling premises.	None obvious.	That increasing numbers of vacant units attract 'unhealthy businesses'.	The Council can control this through its development management activities. Notably, the Government has ensured that these businesses will be classified as 'sui generis' under the 2020 changes to the Use Class order.

5. Visitor Satisfaction			
<p>Visitors that did enjoy shopping and dining in the centre, state that the choice and quality is their primary reason for visiting.</p> <p>The historic character of areas such as The Pantiles was highly regarded.</p>	<p>The tired and 'run down' nature of certain areas of the town detracted from the centre's attractiveness, as did the accessibility (congestion and parking).</p> <p>The choice and range of shopping and leisure options was also flagged as an area of concern.</p>	<p>Royal Tunbridge Wells will need to keep pace with its regional competitors in terms of attractiveness to ensure that it can maintain its market share.</p> <p>It has a large hinterland population who have the ability to turn to other, larger, centres.</p>	<p>The Council and its stakeholder partners should undertake regularly updated customer satisfaction surveys.</p>
6. Business Confidence			
<p>Major national multiple retailers have maintained a presence in the town centre, as have department stores, contrary to national trends.</p> <p>Local stakeholders have an active outlet through the Royal Tunbridge Wells Together (BID) and Royal Tunbridge Wells Town Forum.</p>	<p>Clusters of vacant units are a very visible display of wavering business confidence, particularly when such issues pre-date national economic challenges.</p>	<p>Business requires footfall, and a lack of interested occupiers to fill vacant units can spiral.</p>	<p>Businesses will want to see that relevant stakeholders are invested in bringing additional footfall and investment to the Town Centre.</p> <p>Whilst public sector led developments may not always be viable or feasible, signs of ambition such as Masterplans and Area Plans can demonstrate that an authority is 'open for business.</p> <p>Equally, encouraging further residential living throughout the Town Centre is likely to be major component of increasing confidence and this can be orchestrated through planning policies.</p>

7. Partnership Working			
<p>There is a clear desire for the authority to work in partnership with local stakeholders.</p> <p>The aforementioned activities of the BID and Town Centre Forum are all testament to this.</p>	<p>None obvious.</p>	<p>It will be important for local residents to feel that their voices are heard and that the Council is working in their interest to avoid conflicts when considering town centre development opportunities.</p>	<p>Well established groups provide an existing conduit for the Council to collaborate with local stakeholders.</p>
8. Community Spirit			
<p>High level of engagement within local stakeholder groups and in responses to our public survey suggest deep rooted support for the town centre.</p>	<p>There is less evidence of a pride in the physical spaces beyond The Pantiles. Whilst the Town Centre is generally free of litter and graffiti, there appeared relatively few examples of community involvement in enhancing the spaces (e.g. community planting projects, visible community group promotion) which you see in many other centres.</p>	<p>As well as traders, it is essential that residents have a pride in their Town Centre. Ambivalence by visitors reduces their feeling of loyalty and may lead to them feeling that their needs can be served in other centres.</p>	<p>Greater efforts could be made to engage community groups in creating interest such as the temporary pop-up occupation of vacant units, street events and performances or 'greening' the centre.</p>
9. Events			
<p>Stakeholder consultation highlighted a varied range of events in Royal Tunbridge Wells Town Centre, including the Christmas Markets, and festivals such as Jazz on the Pantiles and Unfest.</p>	<p>Beyond its immediate locality, Tunbridge Wells is not well known for hosting events which draw visitors from beyond its normal catchment area.</p>	<p>Events provide seasonal focus to visit a town centre which might not otherwise exist. If the opportunities are not well marketed and realised, then there is a risk of losing loyalty to other town centres.</p>	<p>Given the success of existing events, there appears to be latent demand for expanding the number of events in the town centre to encourage the evening economy and attract visitors to less popular parts of town.</p>

10. Footfall			
The Town Centre features a number of 'hot spots' of high footfall including The Pantiles, Royal Victoria Place Shopping Centre and Tunbridge Wells Station.	Given the topography of the centre, there was limited footfall between The Pantiles at the south and Royal Victoria Place at the north.	Lower footfall to the north of the centre, outside of Royal Victoria Place, and across stretches of the town centre might undermine investor confidence.	A combination of the suggestions elsewhere in this SWOT analysis will help uplift footfall – principal amongst these are encouraging additional residential living into the Town Centre, as well as further thoughts on creating events.
11. Access			
<p>The train station is relatively centrally located, broadly equidistant from Royal Victoria Place to the north and The Pantiles to the south.</p> <p>Despite survey response concerning parking charges, there is a wide range of long and short stay car parks in the centre that support car travel.</p>	Traffic congestion into and out of the centre can detract from the draw of the centre, whilst the topography can discourage walking through the centre.	Developers, operators and new businesses will avoid risking investment in a centre that suffers from consistent traffic problems.	The Tunbridge Wells Transport Strategy seeks to address existing transport issues by identifying new opportunities to support future developments.
12. Car Parking			
As referenced above, the centre does benefit from a number of parking facilities; however, cost and accessibility reduce their efficiency.	Despite the relatively wide range of car parking sites across the centre, the availability of parking was consistently raised as a concern, alongside parking costs, during stakeholder consultation.	As previously referenced, the increased friction in drawing visitors to the centre can limit investment and occupier interest, a view confirmed by local agents.	As sustainable transport options and technologies become more efficient and reliable, the centre has the opportunity to become less reliant on access by car.

13. Green Environment			
Calverley Grounds are directly adjacent to the Town Centre, providing a pleasant green space to obtain a break from the urban setting of the Town Centre.	Whilst there is some street tree planting along Mount Pleasant Road, the centre as a whole lacks respite from its brick and concrete form.	Health and well-being is moving rapidly up the agenda in terms of talking about generating footfall in town centres. Without further attention, Royal Tunbridge Wells Town Centre could fall behind its regional competitors.	There is an opportunity to move on from the cancelled development proposals for Calverley Square by prioritising opening up and better integrating links between the town centre and Calverley Grounds.
14. Historic Environment			
The Town Centre is rich in historic interest. The Pantiles and the High Street are rich in character, which differentiates the visitor experience from the modern vernacular to the north of the centre.	None obvious.	None obvious.	The promotion of the Town's heritage assets to retail and leisure visitors.
15. Street Markets			
A farmers' market is held at Market Square (adjoining Royal Victoria Place), and The Pantiles street market are held on alternate weekends.	The location of the farmers' market, along Camden Road and behind Royal Victoria Place is somewhat divorced from the core town centre.	Markets continue to come under extreme pressure from macro-economic trends. If the interest of street markets is lost to a town centre, then this can be a significant blow to its footfall and differentiation.	Support should be given to creating and promoting a range of interesting markets across different parts of the Town Centre. This could include an assessment of the success of the farmers market's current location compared to its former position at Civic Way.

16. Independent Trading			
The town centre composition analysis finds that Royal Tunbridge Wells has an impressive proportion of independent traders, particularly along The High Street and The Pantiles.	None obvious.	<p>Rent and business rates are fundamental to incubating an independent business culture in a Town Centre.</p> <p>There is significant media attention on this at the current time, with pressure on landlords and Government to evolve the regime in line with growing pressures on retailers in general.</p>	<p>The Council should be flexible in its application of planning policy in order to ensure that independent traders can readily re-fill vacancies, which would increase footfall and broaden diversity in the centre.</p> <p>Town Centres are not defined by retailing and the introduction of 'Class E' to the Use Classes Order should assist with ensuring that less restrictive controls are placed on diversifying town centres in general.</p>
17. Crime & Safety			
Crime and safety was not highlighted by any significant proportion of respondents in the surveys as being of concern.	Beyond traditional concerns of crimes, consideration should be given to traffic safety concerns where pedestrians interact with vehicles.	Clusters of vacant units increase the risk of a lack of active frontages and passive surveillance.	None obvious.
18. Night-time Economy			
The centre features quality dining options, particularly across the south of the centre.	A lack of diverse options limits the appeal and deprives the centre of the combined draw of a well-rounded evening economy. This is notable in the student survey where no respondents considered the centre met their needs.	Without a consistent approach to opening hours or developing an evening economy, vacancies will struggle to attract new operators.	Planning policy could be developed to consider late-night opening hours as a material consideration in favour of development, where appropriate and subject to relevant amenity considerations.

19. Public Investment			
<p>The Council has undertaken investment including The Amelia Scott Cultural and Learning Hub and public realm projects in recent years, including work to prioritise pedestrians in the centre.</p>	<p>Public investment has focused on 'hard' public realm. Further investment could be directed towards unlocking stalled development opportunities and integrating green spaces into the centre.</p>	<p>General macro-economic conditions dictates that there has been, and may be further, squeezes on public funding.</p>	<p>Subject to viability and the availability of funding, there are a number of stalled development opportunities in the centre that could benefit from public sector intervention.</p> <p>Equally investment in infrastructure, reducing the demand from vehicular traffic could unlock further private sector investments.</p>
20. Technological Advancement			
<p>Between the Council's own resources and local stakeholder groups, there are plentiful internet resources which provide information on Royal Tunbridge Wells.</p> <p>The centre also features a (limited) number of electric car charging points</p>	<p>Royal Tunbridge Wells lags behind many other town centres in terms of its technological innovation.</p> <p>The centre does not have free public Wi-Fi, high visibility, instantly updatable public information boards, or app-based technology for visitor interaction.</p>	<p>Retail and technology are inextricably linked, and the momentum of recent years will only gather pace over the Plan period.</p> <p>The Town Centre will need to keep pace with technological advancements or will risk losing out on a generation of new shoppers.</p>	<p>As technologies develop beyond the 'early adopter' phase, they become more efficient and affordable and the business case for implementing them becomes more established.</p>

Previous Recommendations

- 8.23 Before we go on to consider the key priorities and recommendations, we set out below our previous recommendations from the 2017 Retail and Leisure Study and 2018 Town Centre Office Market Review to establish whether they remain suitable in the context of our latest assessment and findings.

Retail and Leisure Study, 2017

Recommendations: Borough-wide

- Make provision for the development of up to 9,500 sq m (net) of convenience goods floorspace to the emerging plan period at the time (2033);
- Make provision for the development of between 21,700 sq m (net) and 34,000 sq m (net) of comparison goods floorspace over the plan period with new comparison floorspace primarily directed towards Royal Tunbridge Wells;
- There is capacity for new convenience retail floorspace in each of Southborough, Cranbrook and across the rest of the Borough, but this is not considered of sufficient size to specifically plan for any new convenience retail floorspace and will likely be taken up by minor increases in retail provision across the Borough over the plan period;
- There is no specifically identified capacity within the Borough for any leisure facilities, such as health and fitness clubs, cinemas or ten-pin bowling lanes;
- There was public demand for a swimming pool, additional cinemas and children's play facilities;
- A locally set threshold of 280 sq m (net) for proposals within the catchments of Southborough, Paddock Wood, Cranbrook and Hawkhurst Town Centres was recommended;
- The amalgamation of units should be supported where appropriate, to allow for flexibility and encourage investment in the Borough's centre.

Recommendations: Royal Tunbridge Wells Town Centre

- The total provision of retail floorspace proposed through the Site Allocations Local Plan would fall within the identified qualitative capacity and would be suitable for Royal Tunbridge Wells Town Centre, subject to market forces and all other relevant material considerations;
- The current amount of allocated comparison goods floorspace is towards the upper end of the calculated comparison goods capacity, we note that the allocations will be reviewed throughout

the plan period in order to suitably account for relevant changes;

- A local impact threshold of 1,000 sq m (net) for proposals within the catchments of Royal Tunbridge Wells Town Centre was recommended;
- A quantitative capacity for an allocation for one large (or two small to medium) foodstore(s) within the centre, particularly noting the qualitative lack of convenience provision in the centre given relative draw of out-of-centre facilities.

Town Centre Office Market Review, 2018

- The most notable result of the conclusion of the 2018 report, was the recommendation that the Council seeks the implementation of a range of Article 4 Directions to protect existing valued stock from change of use to residential through Permitted Development rights without the need for assessment through a planning application;
- Address an identified shortage of available stock by considering allocating and/or developing (if within the Council's ownership) the following sites for office use:
 - Civic Centre
 - Town Hall
 - Vale Avenue Area of Change
 - 77 Mount Ephraim
 - Sites within the North Farm Industrial Estate / A21 corridor

Suggested Policy Approach

8.24 Having considered the recommendations of the 2017 and 2018 studies against our current findings, as well as our SWOT analysis for Royal Tunbridge Wells, we have identified the following key priorities for Tunbridge Wells Borough Council over the current Plan period:

- i) As previously referenced, we do not consider that there is a pressing qualitative need to allocate a site for a further foodstore at this time, and do not recommend that the Council specifically plans for the allocation of a site for convenience retail.
- ii) Equally, we do not identify any qualitative or quantitative capacity for additional comparison goods floorspace to support any allocations.

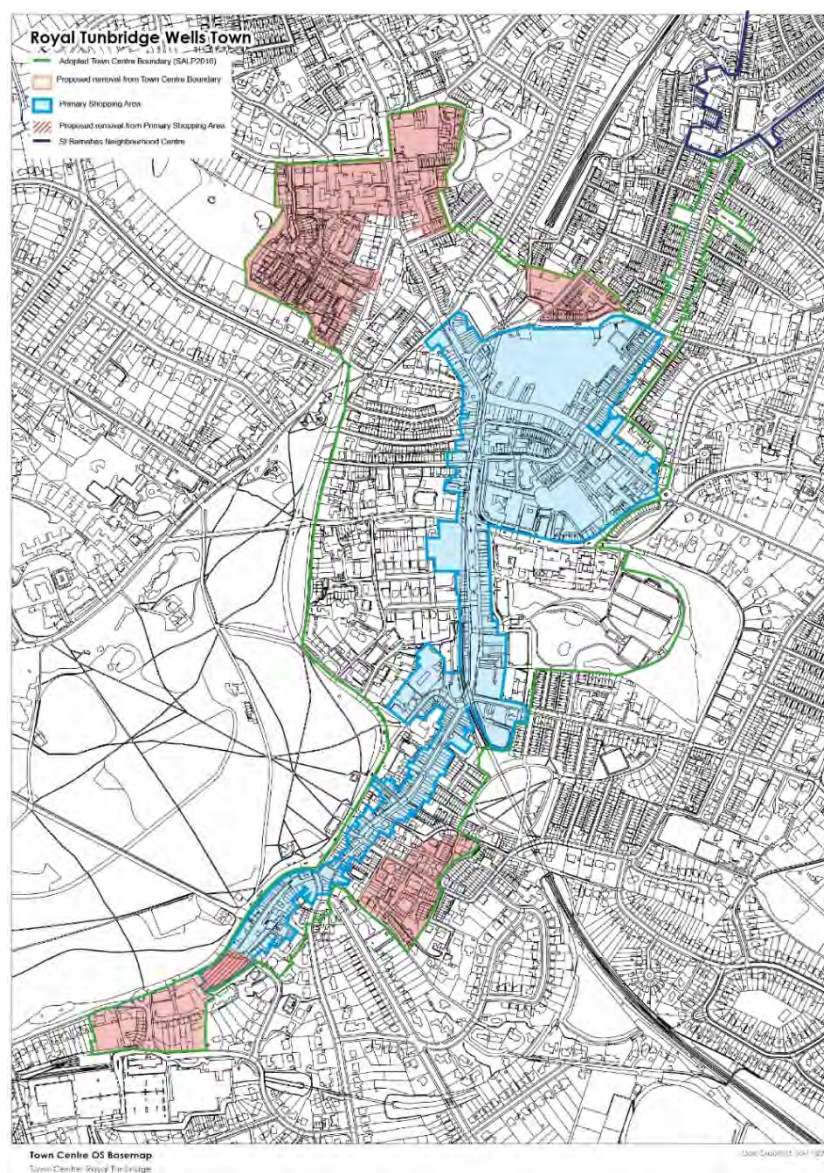
- iii) We do not identify any changes in the wider context that would alter our recommendations for setting a local impact threshold, requiring the submission of a proportionate Retail Impact Assessment for developments greater than 1,000 sq m within the catchments of Royal Tunbridge Wells Town Centre, or 280 sq m (net) for proposals within the catchments of Southborough, Paddock Wood, Cranbrook and Hawkhurst Town Centres.
- iv) Flexible working practices and new formats should be encouraged through planning policies supporting the amalgamation or sub-division of existing town centre units and workspace (where such development results in little loss of net floorspace, but results in a better standard of retail or office accommodation etc.) to encourage investment.
- v) Where allocations within the town centre are to be carried forward, we would suggest a flexible approach to the provision (or re-provision) of retail floorspace, reflecting the fact that changes of use across Class E are no longer defined as development.
- vi) Nonetheless, Class E of the Use Class Order introduces a situation that will enable retail uses to occupy non-retail Class E premises in out of centre locations, circumventing any relevant 'town centre first' policies. As such, and where there is a risk that an alternative use within Class E (such as retail) would impact on the health of surrounding centres, the Council may wish to attach conditions to the grant of planning permission in out of centre locations to restrict the use to that applied for. The Council may also wish to identify aspects of this Study that would form part of an evidence base for any Article 4 directions for future Permitted Development Rights that would result in the loss of Class E floorspace, particularly in the town centre.
- vii) We would also suggest that the Council considers the suitability of adopting a policy that would assist in enabling the re-occupation of longstanding vacant units in the Primary Shopping Area that may no longer be fit-for-purpose as retail units, and would benefit from change of use to an alternative town centre use that would support the overall vitality and viability of the centre (including those outside of Class E, such as pubs, bars cinemas and music venues).

Such a policy could require evidence of a continuous period of vacancy and marketing (for example over an 18-month period) demonstrating that the unit does not have a realistic prospect of being occupied in its current use and would benefit from occupation as an alternative main town centre or residential use. This would have the added benefit of consolidating the retail

provision where it is most in demand, ensuring that the town centre remains competitive.

- viii) In light of recent trends, we recommend consolidating Royal Tunbridge Wells Town Centre by sensitively reducing the boundary as identified at Figure 8.1 (**Appendix E**).
- ix) These reductions will allow other complementary town centre uses, such as office space and residential units, to occupy areas closer to the centre that are currently under performing and suffering from a high number of vacancies, increasing footfall and ensuring a consistent customer base.

Figure 8.1: Recommended revisions to Royal Tunbridge Wells Town Centre boundaries



- (1) Removing areas to the south of The Pantiles that are divorced from the centre and no longer function as part of the Town Centre or Primary Shopping Area;
 - (2) Contracting the Town Centre boundary around the predominantly residential area of Mount Sion;
 - (3) Removing the areas north of St John's Road from the Town Centre boundary. Due in part to the natural topography and road layout of the area, these units collectively function more as a single parade and are not integrated with the Town Centre;
 - (4) Removing the areas north of Royal Victoria Place, along Goods Station Road, that have been developed as residential units.
- x) Whilst we go on to consider the relative merits of the individual site allocations, the uncertainty in the deliverability of certain key sites without significant public sector investment suggests that an alternative approach may be required.

We would recommend that these locations form the foundations of a Town Centre Area Plan exercise, with a particular focus on how a suitably designed, viable and deliverable developments across the Civic Centre, the former ABC cinema site and Royal Victoria Place Shopping Centre can better integrate into the centre as part of a comprehensive vision for the future of Royal Tunbridge Wells.

Any Town Centre Area Plan should include an updated survey of town centre uses (to reflect the recovery from Covid-19 and associated lockdowns) and would need to be developed as part of a wide public consultation strategy in order to build public consensus for any recommendations and deliver a mix of high quality public realm, cultural and leisure offerings, retail and services as well as residential and office accommodation where supported by local demand.

Whilst it is not always feasible for the public sector to fund the development of key sites, the publication, marketing and adoption of a spatial strategy for the Town Centre, alongside comprehensive public engagement can assist in demonstrating the forward thinking nature of the authority and that it is 'open for business'.

- xi) Beyond any future Area Plan, the Council should actively encourage residential living above ground floors in the Town Centre, as well as comprehensive redevelopment schemes which may well be predominantly residentially led, whilst maintaining accessible links through the Town

Centre and prioritising active frontages.

- xii) Policy support should be provided for 'meanwhile' uses to temporarily occupy vacant units by occupiers seeking to test new business concepts, pop-up stores and event spaces where they support the vitality and viability of the Town Centre.

Such a policy could apply to both vacant premises and development sites that are subject to construction delays and long lead-in, and would provide confidence for new and existing small and medium-sized enterprises (SME) investing in Tunbridge Wells.

- xiii) Additionally, 'softer' initiatives within the Town Centre should be actively advocated for within the Local Plan and any future spatial strategy. Such initiatives that could benefit from policy support could include:

- (1) construction of click and collect 'hubs' or lockers;
- (2) Support for town centre events; and
- (3) Commissioning community led murals and public art, including shutter art and building decorations.

- xiv) As identified throughout the study, the centre lacks an established evening economy and would benefit from planning policy support for flexible or late-night opening hours, ensuring that the centre is open and accessible at convenient times, without jeopardising residents and visitor's sense of safety. The adoption of such a policy initiative would set a positive approach to an issue currently facing the Town Centre, yet given the necessary restrictions of planning powers, the policy would only relate to new development proposals.

As such, there is the potential to support this approach with parallel initiatives outside of the planning system in order to maximise opportunities for the Town Centre as a visitor destination, including a more unified approach to activity hours. Creating a consistent structure for opening times to serve the evening economy would support this aim, and ensure that the Town Centre is not outmanoeuvred by competing destinations.

Such a strategy could form part of a Town Centre Area Plan, to guide conditions attached to

future Planning Applications or, alternatively, outside of planning controls as an initiative by a suitable Council representative. The Council could partner with Royal Tunbridge Wells Together (BID) and the Royal Tunbridge Wells Town Forum to progress a strategy encouraging a consistency of approach to activity hours across existing facilities.

- xv) Beyond Royal Tunbridge Wells Town Centre, we are cognisant of the long held ambitions to expand the position and offer of Paddock Wood Town Centre, particularly in light of the planned growth in resident population at the emerging urban extensions. However, Paddock Wood currently suffers from a lack of readily available development opportunities within the centre and (in the absence of significant investment in the centre) requires alternative approaches to facilitate the growth of the centre commensurate with its growing role in supporting an emerging population.

Whilst the centre currently hosts an active and engaged business association and Town Council, consideration should be given to developing a Business Improvement District in Paddock Wood. Formalising key groups and residents within the centre and developing a stronger partnership with the Borough Council will enable the organisation to raise funds and support locally-led town centre improvements ranging from local events to storefront investments and shared services such as logistics supporting online trading.

Importantly, establishing a BID provides a solid grounding for the growing role of the centre as the local customer base grows. We recommend that the Council supports and encourages a BID within Paddock Wood to seek to encourage events and foster a sense of civic pride amongst new residents.

Site Assessment Summary

- 8.25 Pulling the preceeding assessments together, we have also reviewed the town centre allocations set out in the Regulation 18 consultation Draft Local Plan. Based on our understanding of the key priorities as well as the local property market from the previous chapters, we have assessed each of these allocations in turn, taking into account the characteristics of the site and the use and quantum of floorspace included in the plan.

- 8.26 We have assessed each site and interrogated and highlighted a number of criteria around suitability,

availability and delivery, as set out in a standalone **Appendix H**.

- 8.27 It is considered that the Council may be better positioned to seek to influence the deliverability and viability of the sites alongside effort to incorporate any future developments into a wider strategy for the centre of Royal Tunbridge Wells as part of a Town Centre Area Plan.
- 8.28 Nonetheless, other policy allocations remain reasonable. They widely reflect the most appropriate uses for each of the sites allocated.
- 8.29 The suggestions we have made generally reflect increasing the flexibility of the allocations – this is likely to represent the best opportunity for delivery of these sites. In part, recent policy changes such as the introduction of the E Use Class promote flexible and adaptable town-centre space. This means that requirements will not be lost due to restrictive uses and should be encouraged where appropriate. Inclusion of higher-value uses for certain allocations could cross-fund more aspirational development. This type of flexibility could be encouraged through a strategic policy for the wider town-centre area, rather than specific allocations for some of the sites.
- 8.30 We also note that certain uses may be challenging to deliver throughout the plan period. The retail capacity work shows that there is no quantitative need for additional comparison retail space and no qualitative need to allocate new convenience floorspace. This is aligned with our market analysis which indicates little demand from this sector. Whilst this does not mean that no new space will be delivered, we suggest that identifying a large quantum of retail floorspace in the allocations should be avoided.
- 8.31 Additionally, whilst office space *could* be delivered, this will depend on the requirements of large operators, which do not occur regularly in Royal Tunbridge Wells. For large amounts of space to be delivered, this will require the strongest sites in the most prominent locations. As such, office led development opportunities are likely to remain mid to longer-term propositions.

Glossary of Terms

Bulky goods:	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display. <i>Source: Planning Portal</i>
Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace. <i>Source: Planning Portal</i>
Comparison Goods:	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.). <i>Source: Planning Portal</i>
Convenience Goods:	Everyday essential items, such as food. <i>Source: Planning Portal</i>
Edge-of-Centre:	For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. <i>Source: NPPF</i>
Expenditure per Capita:	The amount of money spent on retail goods per person in each Zone across the Study Area.
Expenditure:	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
Experian Goad:	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.
Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.

Financial & Business Services:	<p>An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.</p> <p><i>Source: Experian Goad</i></p>
Floorplate:	<p>Defined as the physical rentable area on one whole floor; sometimes called the footprint.</p>
Goad Plans:	<p>A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations.</p> <p><i>Source: Experian</i></p>
Independent Retailers:	<p>Retailers with less than 10 outlets/ stores.</p> <p><i>Source: Experian</i></p>
Leisure Services:	<p>An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.</p> <p><i>Source: Experian Goad</i></p>
Main Town Centre Uses:	<p>Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).</p> <p><i>Source: NPPF</i></p>
Market Share:	<p>The proportion of residents that visit a particular retail destination, derived from household survey results.</p>
National Multiple:	<p>Defined as retailers with ten or more stores/ outlets.</p> <p><i>Source: Experian</i></p>
Prime Unit:	<p>'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property.</p> <p><i>Source: Colliers</i></p>

Primary shopping area:	<p>Defined area where retail development is concentrated.</p> <p><i>Source: NPPF</i></p>
Retail Floorspace:	<p>Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).</p> <p><i>Source: Planning Portal</i></p>
Retail Impact:	<p>The potential effects of proposed retail development upon existing shops.</p> <p><i>Source: Planning Portal</i></p>
Retail Services:	<p>An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.</p> <p><i>Source: Experian Goad</i></p>
Sequential Approach:	<p>A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites.</p> <p><i>Source: Planning Portal</i></p>
Sales Density:	<p>Turnover, per square metre. Various retail planning sources such as GlobalData UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers.</p>
Special Forms of Trading:	<p>Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.</p> <p><i>Source: Experian</i></p>
Study Area:	<p>The geographical area where the household survey is carried out, based on postal sectors that make up the 16 Zones that cover Tunbridge Wells Borough and its surrounding hinterland.</p>
Trade draw:	<p>The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas.</p> <p><i>Source: PPG Paragraph: 017 Reference ID: 2b-017-20140306</i></p>

Turnover:

Amount of sales per unit area of retail floorspace

Source: Planning Portal

Town Centre:

Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Source: NPPF

**Nexus Planning
London**

Holmes House
4 Pear Place
London
SE1 9HA

T: 020 7261 4240
nexusplanning.co.uk

