



Report

GVA
65 Gresham Street
London
EC2V 7NQ

Epsom & Ewell Borough Council **Retail Study Update 2015**

PLANS & APPENDICES



Plans

Plan 1	Study Area and Household Telephone Survey Zones
Plan 2	Retail Hierarchy
Plan 3	Epsom & Ewell Foodstore Provision
Plan 4	Epsom & Ewell Retail Warehouse Provision
Plan 5	PMRS Thermal Map of Pedestrian Footfall
Plan 6	Epsom Town Centre Comparison Goods Market Share

Appendices

Appendix 1	Convenience Goods Need Projections
Appendix 2	Comparison Goods Need Projections



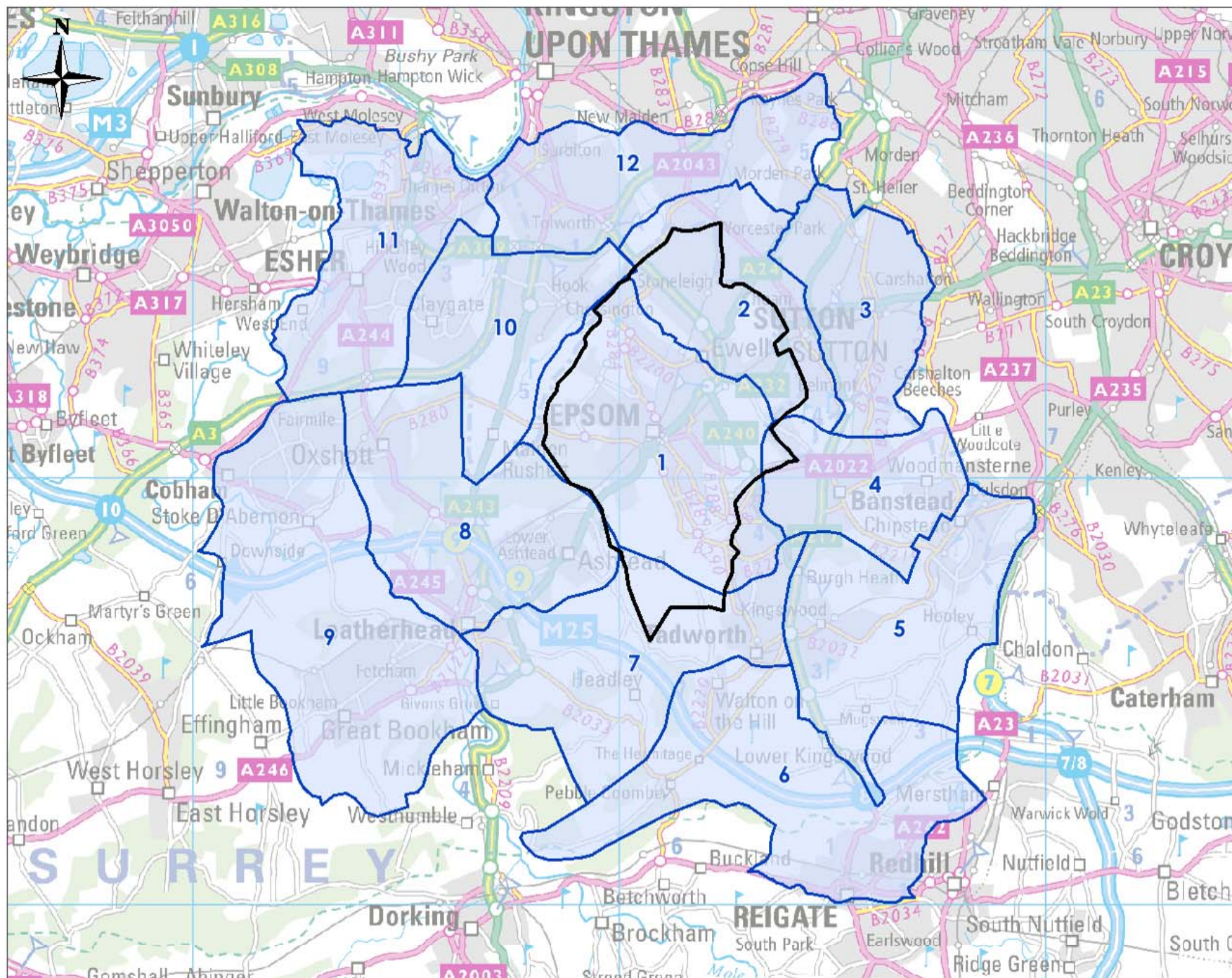
Report

Plans



Report

Plan 1 Study Area and Household Telephone Survey Zones



Study Area and Household Telephone Survey Zones

KEY

- Epsom & Ewell Borough Boundary
- Survey Zone

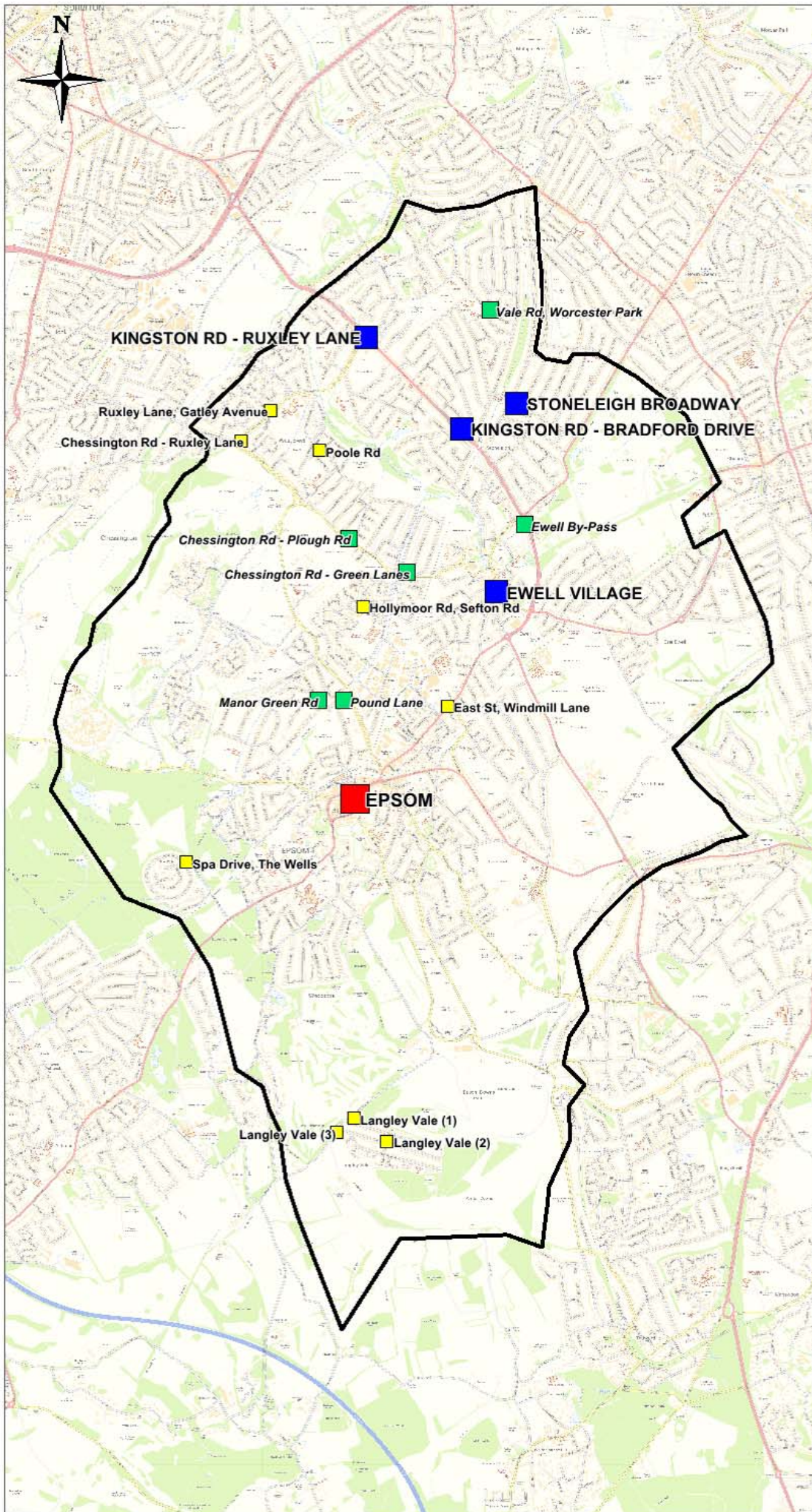
- 1 KT17 1/3/4, KT18 5/7, KT19 7/8/9
- 2 KT4 7/8, KT17 2, KT19 0, SM2 7, SM3 8
- 3 SM1 1/2/3/4, SM2 5/6, SM3 9
- 4 SM7 1/2/3
- 5 CR5 3, KT20 6
- 6 KT20 7, RH2 0/9
- 7 KT18 6, KT20 5, KT22 8
- 8 KT21 1/2, KT22 0/7
- 9 KT11 2/3, KT22 9, KT23 3/4
- 10 KT9 1/2, KT10 0
- 11 KT7 0, KT8 0/2, KT10 8/9
- 12 KT3 5/6, KT5 8/9, KT6 4/5/6/7, SM4 4, SW20 9

Map reproduced from GBPro 200 GB (2014 edition). MapData © Collins Bartholomew Ltd (2014). Postcode Boundary Data © Post Office Ltd 2014



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Plan 2 Retail Hierarchy



Retail Hierarchy

Key

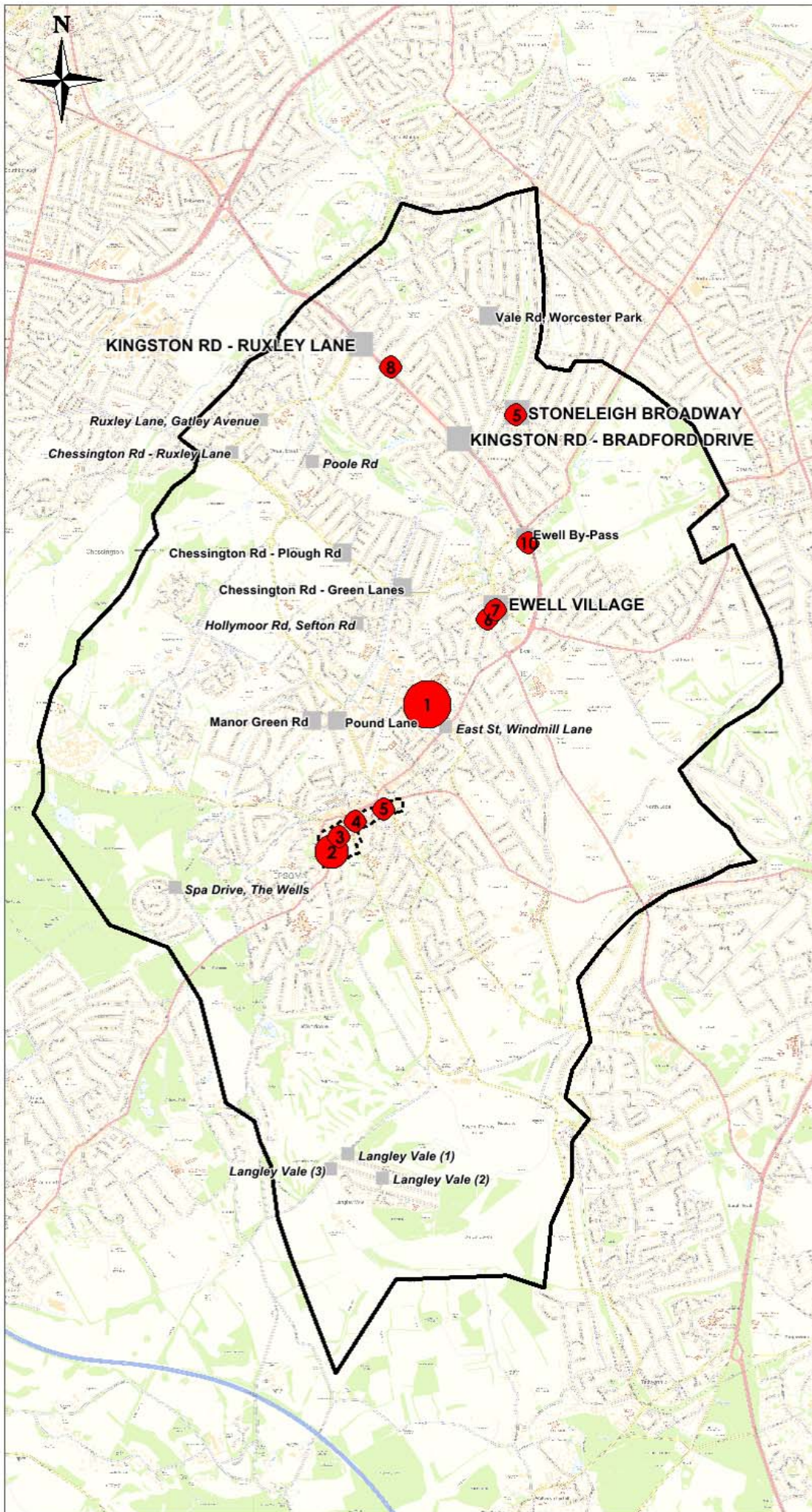
- Town Centre
- Secondary Town Centre
- Local Centre
- Shopping Parade

Map reproduced from GBPro 200 GB (2014 edition). MapData © Collins Bartholomew Ltd (2014).



Report

**Plan 3
Epsom &
Ewell
Foodstore
Provision**



Existing Food Store Provision

Key

- Epsom & Ewell Borough Boundary
- - - Epsom TC Boundary
- Secondary Town Centre
- Local Centre
- Shopping Parade

Foodstores

- 3 - 5,500 sqm net
- 1 - 3,000 sqm net
- < 1,000 sqm net

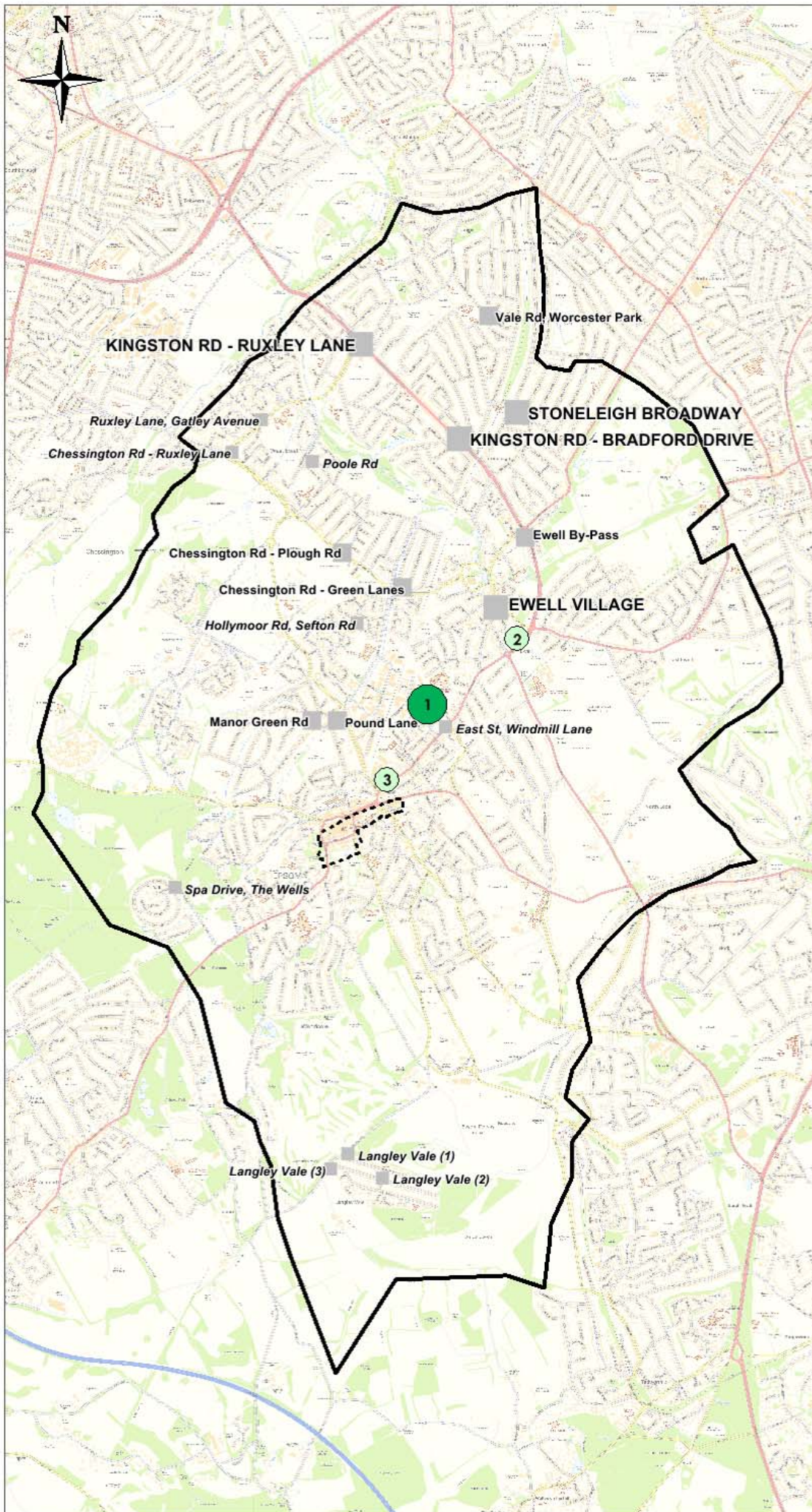
- 1 J Sainsbury
- 2 Waitrose
- 3 Marks & Spencer
- 4 Co-op
- 5 Co-op
- 6 Co-op Late Shop
- 7 Tesco Express
- 8 Co-op
- 9 Welcome
- 10 M&S

Map reproduced from GBPro 200 GB (2014 edition). MapData © Collins Bartholomew Ltd (2014).



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**Plan 4
Epsom &
Ewell Retail
Warehouse
Provision**



Existing Retail Warehouse Provision

Key

- Epsom & Ewell Borough Boundary
- Epsom TC Boundary
- Secondary Town Centre
- Local Centre
- Shopping Parade

Retail Warehousing

- Retail Park
- 1 Kiln Lane
- Retail Warehouse(s)
- 2 Homebase, Reigate Rd
- 3 Staples/Majestic Wine, East Street

Map reproduced from GBPro 200 GB (2014 edition). MapData © Collins Bartholomew Ltd (2014).

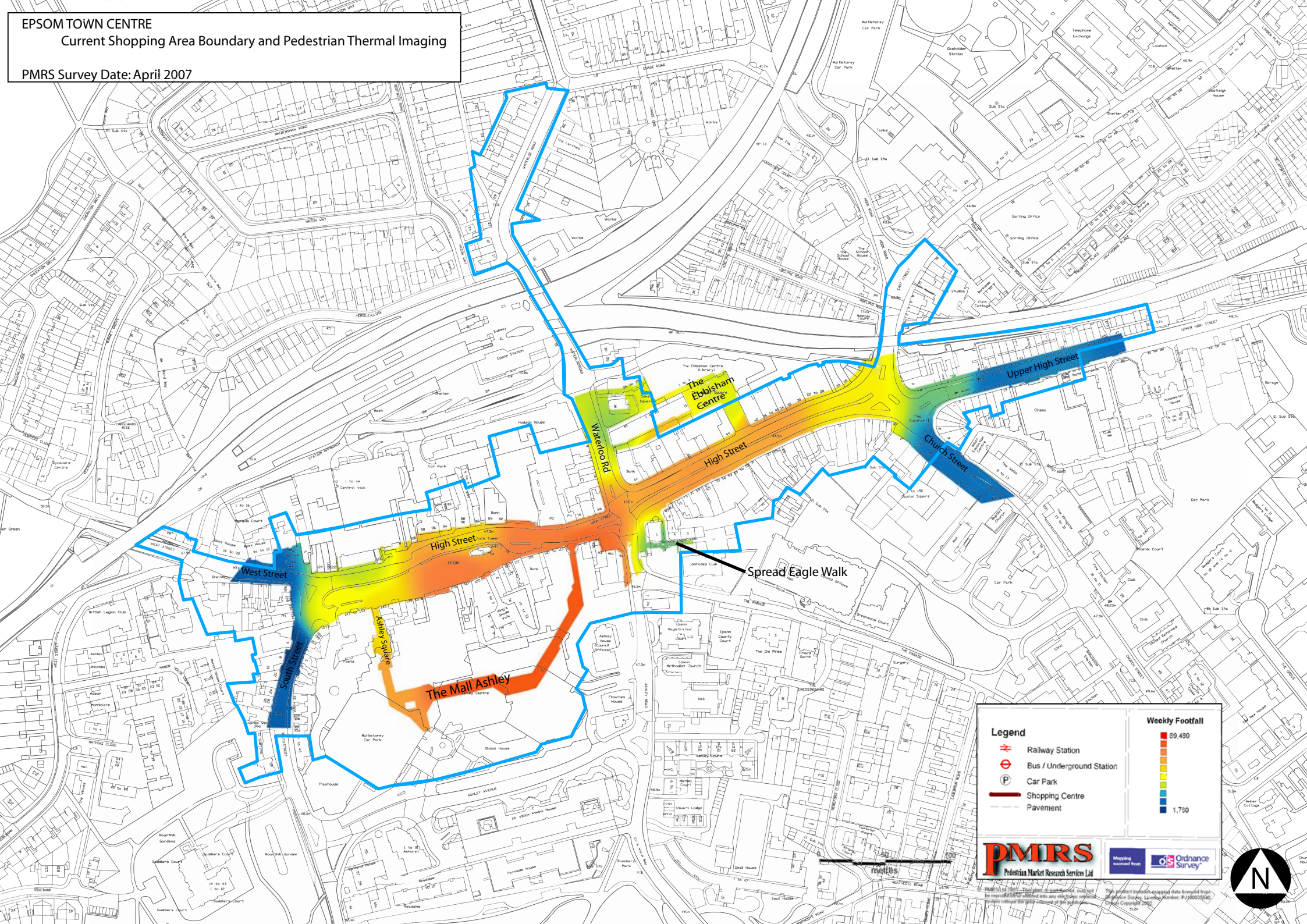
A Bilfinger Real Estate
company



Plan 5
PMRS
Thermal Map
of Pedestrian
Footfall

EPSOM TOWN CENTRE
Current Shopping Area Boundary and Pedestrian Thermal Imaging

PMRS Survey Date: April 2007



Legend

- Railway Station
- Bus / Underground Station
- Car Park
- Shopping Centre
- Pavement

Weekly Footfall

60,450
1,750

PMRS
Pedestrian Market Research Services Ltd

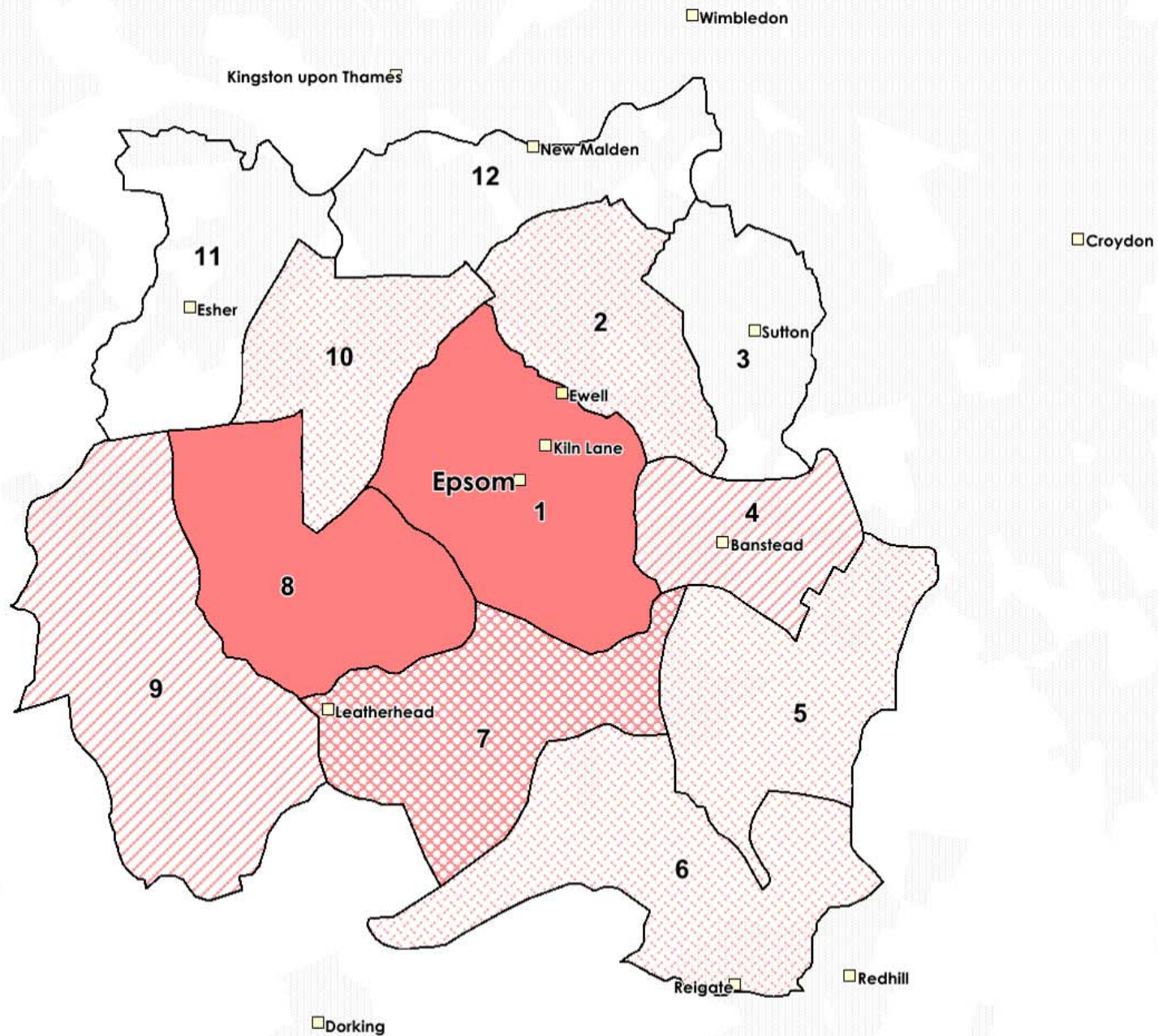
Mapping provided by Ordnance Survey



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**Plan 6
Epsom Town
Centre
Comparison
Goods
Market Share**



BILFINGER



Epsom Comparison Goods Market Share

Key

Comparison Goods
Market Share (%)

- 0.5 - 4.9
- 5 - 9.9
- 10 - 19.9
- 20 - 29.9
- 30 - 44.9
- 45 - 59.9

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Appendices



Report

Appendix 1 Convenience Goods Need Projections

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - CONVENIENCE NEEDS ASSESSMENT

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcodes	2015	2020	2025	2030
1	KT17 1/3/4, KT18 5/7, KT19 7/8/9	59,425	62,878	66,207	69,195
2	KT4 7/8, KT17 2, KT19 0, SM2 7, SM3 8	61,940	65,950	69,735	73,086
3	SM1 1/2/3/4, SM2 5/6, SM3/9	78,046	83,421	88,543	92,929
4	SM7 1/2/3	19,309	20,615	21,841	22,922
5	CR5 3, KT20 6	15,266	16,225	17,130	17,926
6	KT20 7, RH2 0,9	17,136	18,220	19,238	20,129
7	KT18 6, KT20 5, KT22 8	17,628	18,605	19,580	20,446
8	KT21 1/2, KT22 0/7	24,437	25,265	26,173	27,036
9	KT11 2/3, KT22 9, KT23 3/4	31,445	32,471	33,608	34,632
10	KT9 1/2, KT10 0	32,327	34,326	36,091	37,667
11	KT7 0, KT8 0/2, KT10 8/9	32,636	33,597	34,627	35,508
12	KT3 5/6, KT5 8/9, KT6 4/5/6/7, SM4 4, SW20 9	100,922	108,092	114,350	119,819
TOTAL		490,517	519,665	547,123	571,295

SOURCE: Experian Micro Marketer 2013 Data

TABLE 1A
POPULATION GROWTH RATES

2015-2020	2020-2025	2025-2030
(%)	(%)	(%)
5.8	11.4	16.4
6.5	12.6	18.0
6.9	13.4	19.1
6.8	13.1	18.7
6.3	12.2	17.4
6.3	12.3	17.5
5.5	11.1	16.0
3.4	7.1	10.6
3.3	6.9	10.1
6.2	11.6	16.5
2.9	6.1	8.8
7.1	13.3	18.7
5.9	11.5	16.5

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - CONVENIENCE NEEDS ASSESSMENT

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2013 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE Growth Rates: -1.3% 2013-2014; -0.5% 2014-2015; 0.6% p.a 2015-2030										
Zone	2013		2015		2020		2025		2030	
	Minus SFT 2.3%		Minus SFT 2.8%		Minus SFT 4.0%		Minus SFT 4.9%		Minus SFT 5.4%	
1	2,160	2,110	2,122	2,062	2,186	2,099	2,252	2,142	2,321	2,196
2	2,312	2,259	2,271	2,207	2,340	2,246	2,411	2,293	2,484	2,350
3	2,300	2,247	2,259	2,195	2,327	2,234	2,398	2,280	2,471	2,337
4	2,660	2,599	2,612	2,539	2,692	2,584	2,773	2,638	2,858	2,703
5	2,524	2,466	2,479	2,409	2,554	2,452	2,632	2,503	2,712	2,565
6	2,428	2,372	2,385	2,318	2,457	2,359	2,532	2,408	2,609	2,468
7	2,443	2,387	2,400	2,332	2,472	2,373	2,547	2,423	2,625	2,483
8	2,415	2,359	2,371	2,305	2,443	2,346	2,518	2,394	2,594	2,454
9	2,580	2,521	2,534	2,463	2,611	2,506	2,690	2,558	2,772	2,622
10	2,232	2,181	2,192	2,130	2,258	2,168	2,327	2,213	2,397	2,268
11	2,400	2,345	2,357	2,291	2,428	2,331	2,502	2,379	2,578	2,439
12	2,179	2,129	2,140	2,080	2,205	2,117	2,272	2,161	2,341	2,215

SOURCE: Experian Micro Marketer 2013 Data

TABLE 3
SURVEY AREA CONVENIENCE GOODS
RETAIL EXPENDITURE FORECASTS £000s

ZONE	2015 £000s	2020 £000s	2025 £000s	2030 £000s
1	122,551	131,960	141,823	151,921
2	136,719	148,138	159,883	171,746
3	171,344	186,376	201,915	217,203
4	49,031	53,271	57,608	61,967
5	36,783	39,783	42,872	45,983
6	39,723	42,981	46,322	49,677
7	41,114	44,158	47,435	50,768
8	56,325	59,261	62,662	66,343
9	77,441	81,378	85,972	90,801
10	68,864	74,413	79,859	85,425
11	74,763	78,322	82,394	86,598
12	209,930	228,811	247,069	265,343
TOTAL	1,084,589	1,168,853	1,255,812	1,343,775

Source: Experian Business Strategies, Tables 1 & 2

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - CONVENIENCE NEEDS ASSESSMENT

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Zone	SAINSBURYS: KILN LANE OUT OF CENTRE				WAITROSE: ASHLEY CENTRE TOWN CENTRE				MARKS & SPENCER: ASHLEY CENTRE TOWN CENTRE				OTHER STORES IN EPSOM TOWN CENTRE				TOTAL			
	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	49.9	49.9	49.9	49.9	7.3	7.3	7.3	7.3	3.8	3.8	3.8	3.8	1.2	1.2	1.2	1.2	62.2	62.2	62.2	62.2
2	8.7	8.7	8.7	8.7	0.8	0.8	0.8	0.8	2.1	2.1	2.1	2.1	0.7	0.7	0.7	0.7	12.2	12.2	12.2	12.2
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	6.1	6.1	6.1	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	4.2	4.2	4.2	10.3	10.3	10.3	10.3
5	2.2	2.2	2.2	2.2	2.6	2.6	2.6	2.6	0.0	0.0	0.0	0.0	0.5	0.5	0.5	0.5	5.3	5.3	5.3	5.3
6	2.2	2.2	2.2	2.2	0.0	0.0	0.0	0.0	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	3.1	3.1	3.1	3.1
7	6.8	6.8	6.8	6.8	1.1	1.1	1.1	1.1	0.4	0.4	0.4	0.4	1.4	1.4	1.4	1.4	9.7	9.7	9.7	9.7
8	2.2	2.2	2.2	2.2	3.3	3.3	3.3	3.3	0.4	0.4	0.4	0.4	1.1	1.1	1.1	1.1	7.0	7.0	7.0	7.0
9	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	2.1	2.1	2.1
10	7.6	7.6	7.6	7.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	7.6	7.6	7.6
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
12	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	1.2	1.2	1.2	1.2	1.8	1.8	1.8	1.8

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

Zone	SAINSBURYS: KILN LANE OUT OF CENTRE				WAITROSE: ASHLEY CENTRE TOWN CENTRE				MARKS & SPENCER: ASHLEY CENTRE TOWN CENTRE				OTHER STORES IN EPSOM TOWN CENTRE				TOTAL			
	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030	2015	2020	2025	2030
	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)	(£000s)
1	61,184	65,881	70,805	75,847	8,946	9,633	10,353	11,090	4,688	5,047	5,425	5,811	1,409	1,518	1,631	1,747	76,227	82,079	88,214	94,495
2	11,895	12,888	13,910	14,942	1,025	1,111	1,199	1,288	2,837	3,074	3,318	3,564	889	963	1,039	1,116	16,646	18,036	19,466	20,910
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	3,003	3,263	3,528	3,795	0	0	0	0	0	0	0	0	2,059	2,237	2,420	2,603	5,062	5,500	5,948	6,398
5	800	865	932	1,000	966	1,044	1,125	1,207	0	0	0	0	166	179	193	207	1,931	2,089	2,251	2,414
6	864	935	1,008	1,080	0	0	0	0	179	193	208	224	179	193	208	224	1,221	1,322	1,424	1,528
7	2,806	3,014	3,237	3,465	432	464	498	533	154	166	178	190	586	629	676	723	3,978	4,272	4,589	4,912
8	1,225	1,289	1,363	1,443	1,859	1,956	2,068	2,189	239	252	266	282	634	667	705	746	3,957	4,163	4,402	4,661
9	813	854	903	953	813	854	903	953	0	0	0	0	0	0	0	0	1,626	1,709	1,805	1,907
10	5,216	5,637	6,049	6,471	0	0	0	0	0	0	0	0	0	0	0	0	5,216	5,637	6,049	6,471
TOTALS	87,806	94,626	101,736	108,997	14,041	15,062	16,146	17,261	8,097	8,732	9,395	10,071	5,921	6,386	6,872	7,366	115,865	124,807	134,149	143,695

SOURCE: Tables 3 & 4

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - CONVENIENCE NEEDS ASSESSMENT

TABLE 6
CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales Density (£ per sq m net)	Company Average Turnover (£000s)	Actual Sales Density (£ per sqm net)	Actual Turnover (£000s)
TOWN CENTRE							
WAITROSE: ASHLEY CENTRE TOWN CENTRE	1,318	90%	1,186	11,601	13,761	11,837	14,041
MARKS & SPENCER: ASHLEY CENTRE TOWN CENTRE	954	94%	897	11,800	10,582	9,029	8,097
OTHER STORES IN EPSOM TOWN CENTRE	2,076	100%	2,076	3,000	6,228	2,852	5,921
Town Centre Total	4,348		4,159	7,351	30,571	6,747	28,059
OUT-OF-CENTRE							
SAINSBURY'S: KILN LANE	5,107	78%	3,983	9,744	38,815	22,043	87,806
Out-of-Centre Total	5,107		3,983	9,744	38,815	22,043	87,806
SUB TOTAL	9,455		8,142	8,522	69,386	14,230	115,865

SOURCE: IGD & Experian

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - CONVENIENCE NEEDS ASSESSMENT

TABLE 7A
FUTURE CONVENIENCE RETAIL FLOORSPACE CAPACITY (large store format)

TOWN CENTRE CONVENIENCE GOODS					
		2015	2020	2025	2030
1	Total Available Spend in Zones 1-12 (£000s)	1,084,589	1,168,853	1,255,812	1,343,775
2	Total Convenience Turnover of Existing Stores (£000s)	115,865	124,807	134,149	143,695
3	Market Share of Convenience Goods Spend from Zones 1-12	11%	11%	11%	11%
4	Existing Convenience Retail Floorspace (sq m net)	8,142	8,142	8,142	8,142
5	Sales (£ per sqm)	14,230	8,522	8,522	8,522
6	Turnover of Existing Floorspace (£000)	115,865	69,386	69,386	69,386
7	Residual Expenditure (£000)	0	55,421	64,763	74,309
8	Sales per sqm (net) in New Shops (£) - (based on large store format)	12,000	12,000	12,000	12,000
9	Capacity for new floorspace (sq m net)	0	4,618	5,397	6,192

TABLE 7B
CLAIMS ON 'CAPACITY FOR NEW FLOORSPACE [SQ M NET]' [ROW 9, TABLE 7]

		2015	2020	2025	2030
1	Upper High Street/Depot Road [Policy Allocation]	0	1,767	1,767	1,767
2	Tesco, Ruxley Lane [Open and Trading]	0	400	400	400
3	Tesco, Epsom Station Development [Open and Trading]	0	300	300	300
4	Aldi, Kingston Road, Ewell [Open and Trading]	0	1,050	1,050	1,050
	TOTAL	0	3,517	3,517	3,517

TABLE 7C
CAPACITY FOR NEW FLOORSPACE FOLLOWING CLAIMS [SQ M NET]

		2015	2020	2025	2030
	Capacity for new floorspace (sq m net)	0	1,101	1,880	2,675



Report

Appendix 2 Comparison Goods Need Projections

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 1
SURVEY AREA POPULATION FORECASTS

Zone		Postcodes	2015	2020	2025	2030
1		KT17 1/3/4, KT18 5/7, KT19 7/8/9	59,425	62,878	66,207	69,195
2		KT4 7/8, KT17 2, KT19 0, SM2 7, SM3 8	61,940	65,950	69,735	73,086
3		SM1 1/2/3/4, SM2 5/6, SM3/9	78,046	83,421	88,543	92,929
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5		CR5 3, KT20 6	15,266	16,225	17,130	17,926
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10		KT9 1/2, KT10 0	32,327	34,326	36,091	37,667
11		KT7 0, KT8 0/2, KT10 8/9	32,636	33,597	34,627	35,508
12		KT3 5/6, KT5 8/9, KT6 4/5/6/7, SM4 4, SW20 9	100,922	108,092	114,350	119,819
TOTAL			490,517	519,665	547,123	571,295

SOURCE: Experian Micro Marketer 2013 Data

TABLE 1A
POPULATION GROWTH RATES

2015-2020 (%)	2020-2025 (%)	2025-2030 (%)
5.8	11.4	16.4
6.5	12.6	18.0
6.9	13.4	19.1
6.8	13.1	18.7
6.3	12.2	17.4
6.3	12.3	17.5
5.5	11.1	16.0
3.4	7.1	10.6
3.3	6.9	10.1
6.2	11.6	16.5
2.9	6.1	8.8
7.1	13.3	18.7
5.9	11.5	16.5

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2013 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: Growth Rates: 4.6% 2013-2014; 5.6% 2014-2015; 3.3% p.a 2015-2030										
ZONE	2013		2015		2020		2025		2030	
	Minus SFT 11.1%		Minus SFT 12.5%		Minus SFT 15.7%		Minus SFT 15.9%		Minus SFT 15.6%	
1	3,546	3,152	3,917	3,427	4,608	3,884	5,420	4,558	6,375	5,381
2	3,847	3,420	4,249	3,718	4,998	4,214	5,879	4,944	6,915	5,836
3	3,889	3,457	4,296	3,759	5,053	4,260	5,944	4,999	6,992	5,901
4	4,618	4,105	5,101	4,463	6,000	5,058	7,058	5,936	8,302	7,007
5	4,445	3,952	4,910	4,296	5,776	4,869	6,794	5,713	7,991	6,744
6	4,302	3,824	4,752	4,158	5,589	4,712	6,574	5,529	7,733	6,527
7	4,151	3,690	4,585	4,012	5,393	4,546	6,344	5,335	7,462	6,298
8	4,238	3,768	4,681	4,096	5,506	4,641	6,476	5,446	7,618	6,430
9	4,585	4,076	5,064	4,431	5,957	5,022	7,007	5,893	8,242	6,956
10	3,674	3,266	4,058	3,551	4,773	4,024	5,615	4,722	6,604	5,574
11	4,222	3,753	4,663	4,080	5,485	4,624	6,452	5,426	7,589	6,405
12	3,675	3,267	4,060	3,553	4,775	4,025	5,617	4,724	6,607	5,576

SOURCE: Experian Micro Marketer 2013 Data

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2015	2020	2025	2030
	(£000)	(£000)	(£000)	(£000)
1	203,672	244,229	301,768	372,304
2	230,285	277,883	344,800	426,549
3	293,375	355,374	442,624	548,397
4	86,183	104,279	129,645	160,612
5	65,587	78,998	97,871	120,900
6	71,251	85,844	106,364	131,375
7	70,721	84,586	104,461	128,767
8	100,091	117,264	142,551	173,830
9	139,333	163,059	198,044	240,909
10	114,785	138,122	170,416	209,947
11	133,159	155,348	187,884	227,433
12	358,525	435,123	540,163	668,148
TOTAL	1,866,968	2,240,110	2,766,590	3,409,171

SOURCE: Tables 1 & 2

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 4
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Zone	EPSOM TOWN CENTRE			
	2015 (%)	2020 (%)	2025 (%)	2030 (%)
1	26.9	26.9	26.9	26.9
2	4.9	4.9	4.9	4.9
3	0.0	0.0	0.0	0.0
4	9.9	9.9	9.9	9.9
5	2.0	2.0	2.0	2.0
6	2.9	2.9	2.9	2.9
7	18.3	18.3	18.3	18.3
8	20.0	20.0	20.0	20.0
9	5.2	5.2	5.2	5.2
10	3.6	3.6	3.6	3.6
11	0.0	0.0	0.0	0.0
12	0.1	0.1	0.1	0.1
Total Market Share Zone 1-12	6.6	6.6	6.6	6.6

SOURCE: Telephone Survey, November 2008

TABLE 5
COMPARISON GOODS ALLOCATION - SPEND (£000s) 2013 PRICES

Zone	EPSOM TOWN CENTRE			
	2015 (£000)	2020 (£000)	2025 (£000)	2030 (£000)
1	54,744	65,645	81,110	100,069
2	11,371	13,721	17,025	21,062
3	0	0	0	0
4	8,574	10,375	12,898	15,979
5	1,305	1,572	1,947	2,406
6	2,074	2,499	3,096	3,824
7	12,942	15,480	19,117	23,565
8	20,058	23,500	28,567	34,836
9	7,245	8,479	10,298	12,527
10	4,186	5,038	6,215	7,657
11	0	0	0	0
12	446	541	672	831
Total	122,946	146,848	180,946	222,755

SOURCE: Tables 3 & 4

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 6
COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Epsom Town Centre	18,734
Upper Floors	5,737
In food stores	182
Total	24,653

SOURCE: Experian Category Report

TABLE 6A
RETAIL WAREHOUSE PROVISION

	Net Floorspace Sq m
Majestic Wine / Staples <i>31-37 East Street, Epsom</i>	
Majestic Wine	223
Staples	1,007
Total	1,230
Kiln Lane <i>Kiln Lane, Epsom</i>	
Wickes	2,519
Halfords	743
Sainsburys (comparison)	1,124
Total	4,386
Homebase <i>23 Reigate Road, Ewell</i>	
Homebase	3,554
Total	3,554
Total	9,170

SOURCE: Trevor Wood Database

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 7
RETAIL COMMITMENTS

Commitment	Gross Flsp (sqm)	Net Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2008 (£000s)	Average Turnover 2013 (£000s)	Average Turnover 2018 (£000s)	Average Turnover 2026 (£000s)
TOTAL							

SOURCE: Epsom & Ewell Council

EPSOM & EWELL BOROUGH COUNCIL
RETAIL STUDY UPDATE 2015 - COMPARISON NEEDS ASSESSMENT

TABLE 8

FUTURE COMPARISON RETAIL FLOORSPACE CAPACITY

COMPARISON GOODS				0.5% 2008-2016	
GROWTH IN SALES EFFICIENCY				1.5% 2016-2026	
TOWN CENTRE COMPARISON GOODS					
		2015	2020	2025	2030
1	Total Available Spend in Zones 1-12 (£000s)	1,866,968	2,240,110	2,766,590	3,409,171
2	Town Centre Comparison Goods Trade Draw Zone 1-12 (£000s)	122,946	146,848	180,946	222,755
3	Market Share of Comparison Goods	6.6	6.6	6.6	6.6
4	5% Inflow to survey area (£000s)	6,471	7,729	9,523	11,724
5	Total Town Centre Turnover (£000s)	129,416	154,577	190,469	234,479
6	Existing Comparison Retail Floorspace in Town Centre (sq m net)	24,653	24,653	24,653	24,653
7	Sales (£ per sq m) net	5,250	5,382	6,032	6,499
8	Sales from Existing Floorspace (£000s)	129,416	132,684	148,713	160,206
9	Residual Expenditure (£000s)	0	21,892	41,756	74,273
10	Less Commitments (£000s)	0	21,892	41,756	74,273
11	Sales per sq m net in new shops (£)	5,500	5,639	6,320	6,809
12	Capacity for new floorspace (sq m net)	0	3,882	6,607	10,909

NOTE: Sales Efficiency (Row 7) grown 0.5% 2013-2016 then 1.5% 2016-2018