Retail and Commercial Leisure Needs Assessment

Epsom & Ewell Borough Council

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urban shape
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1. Introduction

1.1 Urban Shape are instructed by Epsom & Ewell Borough Council ('the Council') to undertake a borough-wide Retail and Commercial Leisure Needs Assessment. The purpose of the assessment is to provide the Council with an up-to-date and comprehensive understanding of the current health and performance of the Borough's retail and leisure offer within the existing network of town centres, to set out current and future needs for additional floorspace, and to inform the preparation of a robust retail and town centre strategy.

1.2 This evidence base study will be used by the Council to inform the emerging Epsom & Ewell Local Plan which will guide development in the Borough until 2037. The new Local Plan will replace the Core Strategy (2007), Plan E (Epsom Town Centre Area Action Plan 2011) and the Development Management Policies DPD (2015). The Assessment will also remain at the Council's disposal to assist in the determination of planning applications for new development in the Borough.

1.3 Our terms of reference are to:

- Establish the extent to which the current retail and leisure provision in the borough satisfies the level and nature of consumer demand within the catchment – both qualitatively and quantitatively;
- Identify the scale and nature of additional convenience and comparison retail provision that may be appropriate across the borough to the period 2032, taking into consideration changes to population and forecast retail expenditure;
- Assess the scope for new retail and leisure development and the potential to accommodate this within the borough through a recommended town centre strategy;
- Assess the appropriateness of the existing development plan policy approach for retail and main town centre uses across the Borough in order to inform emerging policies for the new Local Plan.

1.4 In addition to on-site and desk-based research, this report is informed by a new and up-to-date Household Telephone Survey covering 1,200 households across 12 survey zones (Plan 1). Urban Shape designed the survey questionnaire in consultation with Epsom & Ewell Borough Council and NEMS Market Research who undertook the interviewing and data processing in August/September 2019. The survey area is consistent with that used to inform the previous Epsom & Ewell Retail Need Assessments undertaken in 2009 and 2015, enabling direct comparisons to be made and trends identified.

Report Structure

1.5 The report is structured as follows:

- **Section 2** summarises the national, strategic and local planning policies relevant to retail and town centre uses in Epsom & Ewell Borough.
- **Section 3** considers national trends in the retail sector, and in particular the implications of economic fluctuations and technological advances which are impacting on shopping habits.
- **Section 4** considers the wider sub-regional context, analysing trends in market share/trade draw and future investment plans which might have implications on the future performance of Epsom Town Centre.
- **Section 5** reviews the composition, role and function of Epsom Town Centre, drawing on on-site surveys, published data, and the outputs from the Household Telephone Survey.
- **Section 6 and 7** provide health check assessments of Ewell Village and Stoneleigh Broadway District Centres;

- **Section 8** sets out the quantitative 'need' for additional convenience and comparison goods retail floorspace in Epsom until 2032 (the Plan period);
- **Section 9** draws the analysis together and sets out our conclusions and recommendations in respect of the current health and composition of the borough's main town centres, the need and opportunities for further growth, the appropriateness of town centre boundaries and frontages, and the robustness of retail and town centre policies.

2. Policy Framework

National Planning Policy Framework (2019)

2.1 The most up-to-date National Planning Policy Framework (NPPF) was published on 19 February 2019. The document sets out the Government's presumption in favour of sustainable development, and confirms that the planning system should be genuinely plan-led. Succinct and up-to-date plans are required to provide a positive vision for the future of each area, and the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. Local plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change.

2.2 Section 7 seeks to ensure the vitality of town centres, emphasising that planning policies and decisions should support the role that town centres play at the heart of local communities. A positive approach should be taken to their growth, management and adaptation. Planning policies are encouraged to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, and the extent of primary shopping areas and the location of development opportunity sites. The NPPF states that planning policies should also recognised the benefits of residential development and town centre living.

2.3 In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.

2.4 In respect of Development Management, paragraph 86 of the NPPF (as revised) states that a sequential assessment is required for planning applications for 'main town centre uses' (which include retail) that are not in an existing centre and are not in accordance with an up to date Local Plan. Applications for main town centre uses should be located in town centre locations, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. Paragraph 87 adds that when considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre.

2.5 Paragraph 89 of the NPPF confirms that when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan, LPAs should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set floorspace threshold, the default threshold is 2,500 sq m of gross floorspace. Impact assessments are required to assess:

- 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
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

2.6 The NPPF directs that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 89, it should be refused.

Planning Practice Guidance (PPG) (2014)

2.7 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG). It was last updated on 22 July 2019. Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

2.8 The guidance provides additional detail on applying the sequential and impact test, and whilst the NPPF has removed reference to shopping ‘frontages’, the PPG confirms that authorities may, where appropriate, wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres. These frontage allocations would be in addition to Primary Shopping Areas.

The Development Plan

Core Strategy 2007

2.9 The Core Strategy identifies the key issues and the social, environmental objectives for the future development of the Borough up to 2022, and a strategy to achieve them. The document recognises that Epsom Town Centre provides a good range and choice of facilities and caters for a wide range of needs. The document states that maintaining the vitality and attractiveness of the Town Centre is key to delivering sustainable development and to maintaining and improving the quality of life of the Borough’s residents. The document emphasises that:

> *“..the Council is therefore committed to a positive and pro-active approach to town centre development and change. Its aim is to ensure that the town reaches its full potential to provide the essential range of services and facilities required, in an attractive environment that is easily accessible by all modes of transport.” (para.3.19.1)*

2.10 As part of the Council’s overall vision for the future of Epsom town centre, the Core Strategy seeks a vibrant, healthy and safe shopping environment, combined with a high-quality townscape. In terms of offer, the vision aims for improved retail attractions, increasing the range of types and form of shops and other high street facilities and services. The strategy also seeks to secure thriving day-time and night-time economies.

2.11 The strategy encourages focus on other key areas including the range and quality of cultural, leisure, social and visitor attractions; improved public transport links; reducing the detrimental impact of vehicular traffic; encouraging a variety of housing; sensitivity to the character and conservation importance of the town centre; and improving the sense of safety and security.

2.12 Paragraph 3.19.3 emphasises that the approach will be to focus and promote a variety of uses within the Town Centre, provided their impact reinforces this vision and can be accommodated without harm to the local community or to its townscape character. Policy CS14 outlines the broad policy context within which further detailed policy development can take place. In addition, the document notes the Council’s next steps to prepare a more detailed Area Action Plan for the town centre, to provide the framework for future change, identify development opportunities and facilitate the changes necessary to promote its vitality and viability.

Plan E 2011: Area Action Plan for the Town Centre

2.13 In accordance with proposals set out in the Core Strategy (2007), the Council prepared Plan E (2011) in close association with representatives from the local statutory, voluntary, community and private sectors. As the main town centre in the borough, Epsom plays a vital role in the community, and the importance of maintaining a vibrant and vital town centre is widely recognised.

2.14 Plan E is a strategic policy document which provides a detailed vision for the future of Epsom Town Centre. It maps out a way forward for the town centre over the next 15 to 20 years, establishing a framework to show how change will take place, how it will be managed, and how it will be delivered. The document is based on the understanding that Epsom Town Centre does not require significant change or regeneration, and rather the focus should be on effectively managing what already exists, while making the most of opportunity sites.

2.15 Plan E sets a vision for each of the key areas throughout the Town Centre, and can be summarised as follows:

- The Old Town and Market Place: The functional heart of the town centre, and the focus for an exciting mix of street-based activities. West Street and South Street will be the focus of high-quality independent shops and restaurants. Promotion of continuous improvements to its appearance;
- The High Street (East): To be reborn as a traditional-style high street shopping environment, reflecting its history as a historic 1930's shopping parade. It will remain the link between the retail heart and specialist/niche retailing on Upper High Street. Derby Square (now part of the Epsom Square site) will be a place for people to meet, eat and drink;
- Upper High Street/Upper Town: The areas historic built environment will be protected and enhanced, and it will be home to high quality and niche retailers, family-friendly restaurants and other leisure activities, including the cinema;
- Ashley Centre and Ashley Avenue: Will continue to be home to a mix of quality national retailers and will have improved pedestrian links to adjoining areas of the Town Centre;
- East Street: The main business district for both Epsom and the wider Borough, with a mix of small shops and other commercial uses;
- Epsom Railway Station and Station Approach: Epsom Station will be redeveloped to provide a mix of uses including a greatly improved station concourse and new housing.

2.16 The remainder of the document sets out how Plan E will achieve the vision. Of particular relevance to this study are Policies E1, E3 and E4. Policy E1 identifies the Town Centre Boundary, and Policy E3 confirms the ambition to maintain Epsom's position as a secondary regional centre, with a retail offer reflecting that of a quality market town. The policy confirms that, based on the 2009 GVA Retail Study, there is need for an additional 2,466 sq m convenience goods floorspace by 2026. For comparison goods, Policy E3 sets out capacity for an additional 7,730 sq m by 2026.

2.17 Policy E4 confirms that the percentage of A1 uses within the Primary Shopping Frontages should not fall below 66%, and uses other than A1/2/3 will not be permitted. Within Secondary Retail Frontages, Use Classes A1/2/3 will be permitted, but A5 uses will not be permitted. Other uses will only be permitted provided they demonstrate compliance with a number of criteria listed.

2.18 Section 5 focuses on 'Opportunity Sites' which have the ability to help realise the vision, with three 'Strategic Opportunity Sites' being identified. These include:

- Depot Road and Upper High Street (Policy E14): A mixed use site including 2,000 sq m of retail floorspace that will allow for a mix of small retail units and a small-medium sized foodstore. A Development Brief (2012) has been prepared for this site [***unimplemented***];
- The Utilities Site (Policy E15): A mixed use site primarily identified for housing and employment;
- Epsom Station Site (Policy E16): Redevelopment of Epsom Station, with additional mix of uses including residential, commercial and a maximum of 1,000 sq m of ground floor retail provision, which could include a café or restaurant [***now implemented***].

2.19 Policy E17 identifies a number of smaller sites allocated for redevelopment which will contribute towards meeting Plan E's wider objectives:

- Market Place, High Street
- Former Woolworths Store, High Street
- Pickard House, Upper High Street
- Former Magistrates and County Court site, The Parade/Ashley Road

- Global House, Ashley Avenue
- TK Maxx Store, High Street
- Emergency Service Uses, Church Street
- Comrades Club, The Parade
- Land to rear of The Albion Public House, South Street
- Town Hall Square and car park, rear of Town Hall

Development Management Policies Document (DMPD) (2015)

2.20 The Development Management Policies Document (DMPD) was adopted in September 2015. The purpose of the Development Management Policies Document is to both support the strategic objectives and deliver the vision of the Core Strategy, and to set criteria by which planning applications and site allocations will be considered and determined.

2.21 DM28, DM29, DM30, DM31 are relevant to 'Retail Uses', underpinned by a town centres first approach. Policy DM28 aims to protect existing retail centres outside Epsom Town Centre, resisting change of use from A1, and with the overall percentage not falling below 50%. Along identified Primary Retail Frontages, the percentage of A1 units is protected to remain above 66%.

2.22 In order to deliver the Council's town centre first approach the document seeks to limit opportunities for further retail development outside of Epsom Town Centre and the Borough's other retail centres. Policy DM29 focuses major new retail developments (defined as being equal to or in excess of 2,500 sqm gross floorspace) towards Epsom Town Centre in the first instance, followed by Epsom Town Centre edge of centre sites, and then within the Borough's other centres which are in locations accessible by a choice of means of transport.

2.23 Neither the Core Strategy nor DMPD identify a local floorspace threshold for the assessment of retail impact. Impact assessments are only required, therefore, for development proposals above the national NPPF default threshold of 2,500 sq m gross floorspace.

2.24 Policy DM30 sets a series of criteria with which to assess proposals to extend or improve existing out of centre retail facilities (Kiln Lane, and Ewell By-pass, Ewell); whilst Policy DM31 safeguards isolated shops and small groups of shops which serve local needs.

Other Relevant Publications

Planning Reform Consultation, October 2018

2.25 In October 2018, Government published a consultation into a series of proposed planning reforms designed to speed up and simplify the planning system; the focus of which was on supporting the high street and increasing the delivery of new homes. The consultation recognised the changing and evolving nature of high streets and town centres across the country, and invited responses on a variety of development management methods which Councils could use to promote greater flexibility.

2.26 Part 1 of the consultation includes proposals in respect of new and amended Permitted Development (PD) rights and changes to use classes, including to support the regeneration of the high street and to extend existing buildings upwards to create new homes. Government is proposing new PD rights to allow existing premises in typical high street uses to change to a wider range of uses, allowing more leisure and community uses such as gyms, libraries, health care and office use as well as homes.

2.27 With the rise of internet shopping, and the change in how people use the high street, the consultation highlights that it is timely to consider how the operation of the Use Classes Order can support greater flexibility. It notes the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands. The changes to PD and use class order which were consulted on can be summarised as follows:

- Allowing class A1, A2, A5, betting shops (SG), payday loan shops (SG) and laundrettes (SG) to change to class B1 (office) use under PD;
- Allowing class A5 to change to class C3 (residential) under PD;
- Ensuring that the A1 (retail) use classification remains modern and current (i.e. whether the current range of goods listed as class A1 use remained fit for purpose); and
- Replacing A1, A2 and A3 with a single use class to cover shops, financial & professional services, restaurants and cafes.

2.28 Government published their response to the consultation in May 2019. This confirmed the intention to proceed and implement the first three bullet points above, but to move away from a suggested single use class which would merge A1, A2 and A3. The government response paper stated that ‘more than half of the 276 responses to question 1.7 agreed that changes to the A use classes would support the high street [and] there was considerable support to simplify the A1 use class to accommodate new and emerging retail models. There was, however, concern that:

> "…merging the A1, A2 and A3 use classes would enable change to restaurant use without any local consideration of the potential impacts from longer opening hours and increased noise and odours. It could lead to a proliferation and increased concentration of restaurants, including fast food restaurants, in an area with an impact on the health of local residents and local amenity. There was also a concern that it would limit the ability of local communities to shape their high streets as set out in local or neighbourhood plans."

2.29 Further clarification on all points are yet to be published, including reference to the prior approval of certain planning impacts. It is evident, however, that Government are intending to move towards a more flexible policy approach to the high street, particularly regarding modern business formats and the acceptance of ancillary uses within A1 shop units.

The High Street Report & Future High Streets Fund (2018)

2.30 In December 2018, the Government published ‘The High Street Report’, setting out the findings of the ‘High Streets Expert Panel’ which was established earlier in 2018. The Panel sought to identify the key issues facing high streets and town centres, and advise on the best practical measures which the Government can take to help.

2.31 The publication of the Report followed on from the announcement in the budget of Autumn 2018 of a £675m ‘Future High Streets Fund’, set up to help local areas respond and adapt to the changes facing town centres. The Fund will support local areas in preparing long term strategies for town centres, including funding a new High Streets Task Force to provide expertise and support to local areas. It will also co-fund investment projects in town centres, either in the form of physical infrastructure (including the regeneration of heritage high streets) or investment in land assembly, for example to support the densification of residential and workspace in town centres in place of under-used retail units.

2.32 The High Street Report provided recommendations on how the above measures should best be implemented to ensure town centres could maximise benefits:

- Making the Task Force the ‘single voice’ for town centres; facilitating cross-sector networking and skills building; and act as provider of access to expert help and support.

- That the Future High Streets Fund should interact with the Task Force to increase the impact of both; should fund places with community involvement in their town centre; and fund towns that demonstrate a clear vision and cross-sector leadership.
- In addition the report recommended a number of additional interventions to help facilitate town centre revitalisation, including that towns should improve the 'housekeeping' of their town centres, including creation of a 'National High Street Perfect Day'; that local authorities should 'use initiative' to encourage landlords and tenants to think innovatively about how to use empty properties; and that towns should ensure that parking restrictions/charges are not discouraging town centre use.

2.33 Alongside the High Street Report, a second report 'High Street 2030: Achieving Change' was published, setting out the findings of workshops undertaken by the Institute of Place Management to collect evidence to support the development of town centre policy.

Summary

- The NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA's to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality and positively seek opportunities to meet the development needs of their area.
- The NPPF focuses on Primary Shopping Areas, removing reference to Primary and Secondary Frontages, but the PPG confirms that such allocations remain useful tools if desired in supporting the vitality and viability of town centres.
- The Development Plan confirms the Council's commitment to a positive and pro-active approach to town centre development and change, seeking to improve retail attractions, and increase the range and types of shop and other high street facilities and services. A Core Strategy commitment to the preparation of a more detailed Area Action Plan (AAP) led to the adoption of Plan E 2011, an AAP for Epsom Town Centre.
- Plan E emphasised that Epsom Town Centre does not require significant change or regeneration, but rather a focus on effectively managing what already exists and making the most of opportunity sites. The document identified a series of key character areas within a defined town centre boundary and – together with the Development Management Policies Document – set an A1 minimum threshold of 66% of units within the Primary Shopping Frontage, and 50% within the Town Centre Boundary.
- Key development opportunity sites were identified in Plan E including Depot Road/Upper High Street, The Utilities site, and Epsom Station, one of which has now been implemented (Epsom Station) and one part implemented (Utilities site). When considering development proposals, the development plan does not fix a locally set retail impact floorspace threshold and by default refers decision makers to the national NPPF threshold of 2,500 sq m gross.
- Recent consultation on proposed planning reform (2018) highlights the government's intention to move towards a more flexible policy approach to the high street, recognising modern business formats and emerging retail models within A1 shop units. The government response paper suggests, however, that they are unlikely to move towards a merged Use Class A category in order to retain a level of planning control to shape high streets.

3. National Market Context

3.1 Trends in the retail and leisure sector influence how people use town centres. In turn, these have important implications on the formulation of planning and spatial strategies and the future vitality and viability of each individual town centre across the UK. Appendix 1 provides a detailed discussion of the subject trends, and we provide a high-level summary in this section, drawing out the key points of relevance for town centre planning in Epsom & Ewell.

3.2 Trends in recent years have been well documented. They broadly relate to global economic fluctuations, growth in on-line shopping/multi-channel retailing; changes in the property and space requirements of retail operators; evolution towards multi-dimensional town centres and the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth in discount retailers and more varied food shopping habits. Sectoral analysis and published evidence confirm that town centres will need to continue to evolve and adapt to remain vital and viable locations.

The Evolving Role of the Town Centre

3.3 Retail will continue to be a vitally important footfall driver in town centres, and should not be swept aside in favour of alternative town centre uses. Whilst town centres are evolving, the role of retail and retail operators should be central to any town centre strategy moving forwards. Nevertheless, trends and the need to inject life into our high streets have introduced new, multi-dimensional elements to town centres which should be promoted and incorporated – alongside retail – into emerging town centre strategies. These can be summarised as follows:

- The development of an **'experience'** for visitors who are increasing seeking to combine retail and leisure activities as part of a single 'going out' trip. Town centres much provide an attractive experience for visitors which the internet is unable to match. This might include specialist markets, independent cinemas, street food and seasonal events, for example.
- Town centres acting as genuine **hubs for their communities**, and the need to create a vibrant social, commercial and cultural destination. Uses might include cultural space, co-working space, space for small and medium-sized enterprises (SME's), community facilities including libraries, education space, community halls/meeting venues.
- Growth in **town centre living** and residential space/student accommodation – delivering footfall in the evenings and at weekends as well as during the daytime. A town centre strategy will require consideration of noise, environmental health and licensing hours in order to consider residential amenity alongside a supported evening economy.

3.4 An enhanced and multi-dimensional town centre strategy will require a co-ordinated and joined-up approach from all key parties in Epsom, including the Council, operators, shopping centre owners, market traders, and organisations such as the Epsom BID. Section 5, 6 and 7 of this report sets out details of identified trends in Epsom, Ewell Village and Stoneleigh Broadway, enabling informed conclusions as to what more is required in the future.

Economic Trends

3.5 Since the Epsom & Ewell 2015 Retail Update was published, the UK's decision to leave the European Union has become an influencing factor in forecasts of economic growth. This has led to short term uncertainty impacting consumer confidence and spending, with direct consequent impacts on forecast expenditure growth rates for both convenience and comparison goods. This is reflected in Section 8 when forecasting need for future retail floorspace. The medium/longer-term outlook has depended very much on whether a soft Brexit (i.e. access to the single market) or a hard/no deal Brexit is struck – or indeed whether a deal can be struck at all.

3.6 The recent general election in December 2019, and resulting Conservative party majority, provides more certainty that a deal will be made at the earliest opportunity and that the UK will leave the European Union. This political stance does provide a greater degree of economic certainty over a shorter time period, but the implications of a Brexit deal and associated timescales will need to be monitored over the coming weeks and months.

Online and Multi-Channel Retailing

3.7 Online shopping has become a firmly established method of shopping. Evidence demonstrates the continued growth of this sector in terms of those that have internet access, those that use the internet everyday, the methods and modes used to undertake such transactions, and the breadth of the population taking advantage of what is on offer, with the largest rise in the 65+ age group in recent years.

3.8 Considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The most popular categories are clothes and sports goods, followed by household goods, holiday accommodation, tickets for events, travel arrangements, and films and music. Four out of these six goods categories are those which have historically been purchased through physical high street stores, and the shift of spending to online platforms has resulted in a number of operators ceasing to trade or reducing their network.

3.9 The associated challenges for high street operators, coupled with often high levels of business rates and rental agreements, are clear to see. The overall picture reflects mixed fortunes with winners and losers on the high street with those operators at the middle to value end of the market – including Primark/H&M/Sports Direct/TK Maxx – recording strong performance levels.

3.10 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a 'joined-up' town centre 'experience' to lure shoppers away from the internet and instead to visit the high street and to extend their dwell time through a range of retail and leisure attractions.

Click and Collect

3.11 Research indicates that the click and collect market will grow by a further 46% by 2023. Click and collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of that operator. This is an important opportunity for town centres, as it can act as a footfall generator in its own right. Research demonstrates that 39% of consumers make an additional purchase in that town centre when collecting an item from a store.

3.12 In Epsom, shoppers can pick up John Lewis orders from Waitrose in the Ashley Shopping Centre, thus avoiding trip journeys to Kingston upon Thames. John Lewis state on their website press releases that "in the last five years alone, Click & Collect orders have increased more than 50% as customers enjoy the ease and convenience it provides. Currently 57% of all online orders are delivered through this service with 25% of packages collected at John Lewis shops and 75% at Waitrose shops". This recent trend is likely to have had a direct positive impact on Epsom Town Centre.

3.13 A threat to the continued growth of click and collect is the rise of instant delivery and saver delivery services, as businesses aim to match efficient delivery options and consumer expectations. This includes same day delivery, one-hour delivery windows, and delivery passes whereby a consumer pays an annual subscription to guarantee same day, next day or timeslot delivery options. The impact of this on click and collect and associated opportunities for town centres will need to be monitored.

Commercial Leisure Sector

3.14 In recent years, the commercial leisure sector has played an increasingly important role in the vitality and viability of town centres, as the nature of town centres continues to evolve. In many new town centre schemes, a cinema or family/casual dining has replaced retail as the ‘anchor’, driven by the growth of this sector and the need for town centres to generate a more varied visitor experience. There are signs, however, that the casual dining sector is reaching saturation and increased competition is leading to casualties. Analysts suggest that in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators’ profits.

The Convenience Sector

3.15 The trends being experienced in the food retailing sector were established to varying degrees at the time of the 2015 Retail Study update. Food superstores are experiencing a decline in market share, small format stores of the market leaders are gaining market share, discount retailers – Aldi and Lidl – are achieving strong growth, and on-line spend is continuing to grow although not to the same extent of non-food shopping. The market leaders have pulled back on large superstore openings, and whilst small convenience stores continue to open this is not at the same pace as that seen in recent years.

Banks and Financial

3.16 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in centres at all levels in the hierarchy, the presence of a wide range of banks and building societies formed an important part of a centre’s mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.

3.17 According to research from CACI[1], customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017. Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in central town centre locations, which are in some instances challenging to let.

Out-of-Centre Retailing

3.18 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict (national retail intelligence and trend analysts), out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; although this sector has felt the implications of a changing market economy, with a slow-down in new retail parks and a general ‘softening’ of existing retail to more mixed-use leisure parks.

3.19 The recovery of market confidence which took place since 2013 has, however, benefited out-of-town retailing. Vacancy rates fell, footfall has increased, and many retailers are seeking expansion in existing – and some new – out-of-centre locations. Some traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of ‘At Home’ stores in prominent out-of-centre locations, as well as other traditionally ‘high street’-focussed retailers such as, Next, Primark and H&M.

3.20 Epsom & Ewell Borough has relatively limited retail warehouse provision, with the exception of three retail warehouse units – currently occupied by Homebase, Wickes and Halfords – on Kiln Lane in

[1] Analytical research company, providing operator trend data.

Epsom, adjacent to the large out-of-centre Sainsbury's supermarket. However, there are large concentrations of retail warehousing at Purley Way, Croydon (which includes one of London's three IKEA stores, as well as a John Lewis at Home and several home/furniture stores) and at Shannon Corner, New Malden, both of which are easily accessible to many residents of the Borough (although less so by public transport). Both retail warehousing destinations have an influence on shopping patterns in Epsom's catchment area; this is discussed further in the following section.

Summary

- Today, the success of town centres is less reliant on traditional retail floorspace, instead becoming more focused on ensuring a multi-dimensional offer and the creation of a visitor experience of sufficient quality to compete with internet sales.
- The town centre market has been challenging in recent years, as the UK comes to terms with and explores the means with which to leave the European Union. Associated economic uncertainty has led to a more reserved level of consumer spending, and this, alongside the growth in online spending, competition for click and collect, and a saturated casual dining experience, the high street has been hit hard.
- For Epsom, the retention of retail floorspace and the creation of a more diverse leisure and visitor economy will be key to consolidate its position in the sub-regional network of centres performing the role of a larger town centre. There has been a slow-down in the roll-out of new retail park destinations nationally, but a related trend to evolve existing destinations to a wider mix of retail and leisure uses. Proposals that might compete with the network of town centres should be refused.

4. Sub-Regional Context

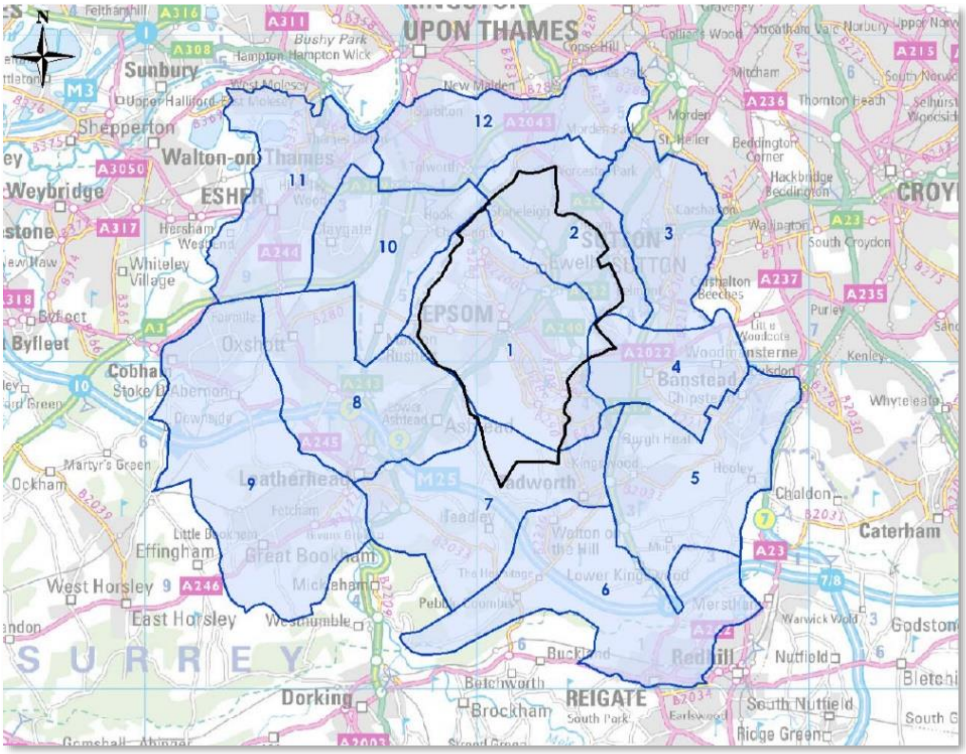
4.1 The 2009 Retail Study examined the retail performance of Epsom Town Centre in the context of the retail network across the wider sub-region. The analysis focused on the shopping catchment, trade flows, the profile of competing centres, and a detailed town centre health check of Epsom. The 2015 Retail Study Update set out how the retail context had since changed including a review of pipeline development in key competing centres. This section summarises those findings and provides an up-to-date analysis of the sub-regional context based on a newly commissioned Household Telephone Survey.

4.2 Each competing shopping destination will draw a proportion of trade from the survey area/Epsom's catchment area. Boroughs are not 'closed systems' and there will be inflows and outflows of expenditure. It is not realistic to expect 100% trade retention with a borough, but it is a useful tool to understand the strength of different centres, where the key parts of a catchment are located, the opportunities to enhance trade draw, and to assess over time trends in market shares – either improvement or decline. The analysis provides an in-depth insight into the performance and vitality and viability of a town centre.

Household Telephone Survey

4.3 The survey area defining the focus of the past (2009 and 2015 update) and current (2019) analysis is shown below in Figure 4.1, and comprises 12 Survey Zones. A new household telephone survey was undertaken in August 2019 across 1,200 households capturing data on shopping patterns, socio-economic profiling, and qualitative strengths, weaknesses and opportunities. Analysis of the outputs enables us to understand shopping patterns for food and non-food goods, the trade draw of each respective town centre and out-of-centre destination across the catchment area, and a comparison of the performance of each across the sub-region.

Figures 4.1: Household Telephone Survey Area 2008 & 2019



NB: Household Telephone Surveys undertaken in 2008 and 2019

Shopping Catchment 2009 Retail Study

4.4 The 2009 study identified that Epsom's catchment profile is affluent and has a strong family bias. Drawing on evidence provided by the Council at that time, there was a very high presence of Wealthy Executives and Prosperous Professionals, typical of Surrey residents. On that basis, it was concluded that this highly affluent catchment may be able to support a premium-market retail sector amongst its retail mix. The 2015 Update considered that position to have remained unchanged, reflected in the implementation of the affluent Hospital Cluster housing development and continued strong house price rises.

4.5 In terms of the sub-regional context, the 2009 Study identified Banstead, Croydon, Guildford, Kingston-upon-Thames, Leatherhead, New Malden and Sutton as Epsom's main competing centres. The review of key performance indicators in 2009 confirmed the higher order shopping roles of Kingston, Croydon, Guildford and Sutton, offering a more extensive and therefore superior retail offer to Epsom.

4.6 In terms of 2009 catchment dominance, Kingston and Sutton presented the strongest influence on shopping patterns, drawing 28.4% and 16.0% of available comparison goods trade from Zones 1-12. Epsom was performing well for a centre occupying a lower position in the sub-regional retail hierarchy, attracting 6.6% of total available comparison goods expenditure from across the survey area. It was concluded in 2009 that Epsom exerts much influence over the central and southwestern parts of the survey area demonstrating an established and loyal shopper base.

Shopping Catchment 2019

4.7 Despite a tentative economy and more stagnant house prices in recent years, the overall conclusion in respect of levels of affluence across Epsom & Ewell Borough remains broadly similar in 2019 when compared to the 2015 Study. This is evidenced in the most recent Coast2Capital Local Industrial Strategy (LIS) (Draft, September 2019)[2]. The draft report identifies that Epsom & Ewell has the highest proportion of people (within Coast2Capital) in higher level occupations within the 'Managers, Directors and Senior Officials' category. The evidence sets out that higher incomes in Epsom & Ewell are assisted by London commuting levels, and the borough has one of the highest number of new business growth rates, recorded as being higher than the 'England average'.

Figure 4.1: Local Industrial Strategy (LIS) Study Area

[2] Coast2Capital.org.uk Draft Report LIS Economic Report prepared in September 2019 by Hatch.

4.8 Consistent with the 2009 Retail Study, the recently completed up-to-date household telephone survey (2019) enables us to examine the performance of Epsom town centre in the context of the retail network across the wider sub-region, examining the influence of key competing strategic centres on the current and future role of the Borough's retail hierarchy. The analysis draws extensively on the survey data, and qualitative desk-based research has been undertaken to establish major pipeline development proposals in competing centres.

4.9 Shopping patterns from the survey allow us to calculate the amount of comparison goods expenditure that each competing centre draws from the survey area. This indicator takes into consideration the strength of the retail offer as well as the centre's accessibility and distance from Epsom. The total amount of expenditure flowing to these centres is set out in Table 4.1, below.

4.10 Epsom is located most central to the survey area, drawing £216.9m of comparison goods expenditure (10.5%) from Zones 1-12; this is a 3.9% market share (£124.4m) increase over the last 11 years (since the 2008 survey) and is a particularly strong vitality indicator for Epsom in 2019. The town centre achieves its greatest market share in Zones 1 (37.3%), Zone 7 (27.7%), Zone 8 (21.4%), Zone 2 (14.1%), and Zone 4 (13.9%). This area reflects Epsom's core catchment area, with all zones adjoining central Zone 1 – Epsom's location zone.

4.11 The market share of all competing centres – aside from Guildford, which has remained static – has fallen. The analysis demonstrates the success of Epsom town centre in consolidating its town centre offer and becoming a more attractive destination for people to shop; a centre of choice for more people than that identified in 2008. This is likely to be a reflection of an improved retail offer over the last 10 years, the growth in click and collect and the ability to access a greater range and depth of goods in the 'local' town centre – Epsom, and in particular the introduction of John Lewis click and collect from Waitrose in Epsom Town Centre, thus avoiding the need to travel to Kingston for this key high street operator.

Table 4.1: Survey Area Comparison Goods Trade Draw: Key Competing Centres

	2009 Trade Draw (£m)	2009 Trade Draw (%)	2019 Trade Draw (£m)	2019 Trade Draw (%)
Kingston-upon-Thames Town Centre	£401.2m	28.4%	£521.8m	25.4%
Sutton Town Centre	£225.5m	16.0%	£256.5m	12.5%
Epsom Town Centre	£92.5m	6.6%	£216.9m	10.5%
New Malden Retail Warehousing	-	-	£171.6m	8.3%
Purley Way, Croydon Retail Warehousing	-	-	£134.5m	6.5%
Guildford Town Centre	£40.9m	2.9%	£59.1m	2.9%
Leatherhead Town Centre	£28.5m	2.0%	£37.3m	1.8%
Central London	-	-	£30.9m	1.5%
Reigate Town Centre	-	-	£28.4m	1.4%
Banstead Town Centre	£18.6m	1.3%	£23.4m	1.1%
Croydon Town Centre	£41.3m	2.9%	£17.2m	0.8%
Redhill Town Centre	-	-	£17.3m	0.8%

4.12 This improved strength in positioning has come at the expense of the other competing centres, including Kingston which has seen its market share within Zones 1-12 falling from 28.4% to 25.4%, and Sutton which has experienced a fall in market share from 16% to 12.5%. Kingston and Sutton are the two key centres drawing the highest proportion of trade from the survey area/Epsom's catchment area. Over the last 11 years Epsom has consolidated its position, clawing back trade previously lost to these shopping destinations.

4.13 Leatherhead and Banstead have experienced a small fall in market share, but the market share of Croydon town centre has experienced a more substantial decline from 2.9% to 0.8%. Reigate and Redhill have been introduced to the analysis demonstrating their area of influence primarily in Zone 6 – their location zone being some distance south of Epsom. These destinations on the outskirts of the survey area help to explain the 'cut-off' in Epsom Town Centre's catchment area and provide the reason for a lower market share in these outer survey zones.

Competing Centres – Pipeline Development

4.14 The above analysis sets Epsom in context at a 'point in time', i.e. presenting the current relationship with the surrounding network of town centres and retail shopping destinations. We have taken this a stage further to review developments in the pipeline in competing centres to assess the likely increase in trade draw as a consequence of a new and improved shopping experience. In summary, the review explores future risk to Epsom retaining current levels of market share, or inversely the opportunity for Epsom to continue to improve market share over the next 10 years consistent with past trends.

4.15 The 2015 Retail Study update identified the following key planning commitments:

- **Croydon**: Planning permission was granted in February 2014 for the comprehensive redevelopment of the Whitgift shopping centre and surrounding land. The scheme would comprise over 150,000 sq m (1.6m sq ft) of retail and leisure floorspace, and completion was expected – at that time – in 2018. The proposals, by Westfield/Hammerson, would be comparable in scale to Westfield West London and Westfield Stratford City.
- **Guildford**: Property investor, PRUPIM, had become the sole freehold owner of the Friary Shopping Centre, and Land Securities had been appointed the Council's development partner for the North Street site. The Council were working with both partners to bring forward new town centre/retail development on the North Street site, with linkages/integration with the Friary Shopping Centre. There were no fixed timescales at that time.
- **Kingston**: The Eden Quarter was identified as the key town centre development opportunity, and the associated Development Brief had been adopted in March 2015. The principle aim – at that time – was the expansion of Kingston's retail offer and the delivery of a mix of shop units, convenience retailing and restaurant uses. The expectation was the delivery of up to 30,000 sq m of retail floorspace.
- **Sutton**: In early 2014 plans for a large-scale mixed use development on the gas holder site in Sutton were approved, leading to the regeneration of the northern part of the town centre. In terms of retail, the scheme included a new Sainsbury's superstore and nine unit shops.

4.16 The redevelopment scheme in **Croydon** continues to move forwards although scheme composition is evolving in response to national trends. In November 2017, Croydon Council granted planning permission for enhanced plans, and in January 2018 the Mayor of London approved the scheme. In May 2018 John Lewis and Waitrose were secured as key anchor tenants, with an 'earliest' target opening date of 2023. More recently (November 2019), the Croydon Partnership (Westfield/Hammerson) and Croydon Council met to discuss the redevelopment of the town centre, with a focus on a revised scheme to ensure "the development meets the rapidly changing needs of consumers, retailers and the overall town centre".

4.17 The revised proposals include a higher proportion of mixed-use including high-quality offices and co-working spaces, a hotel and homes alongside a scaled-down retail offer. The statement published by the Croydon Partnership states that "considerations also include fewer parking spaces, the possibility of retaining and reusing some key buildings and more open space, which aligns closely with the council's and the partnership's sustainability agendas. While the revised scheme is worked up in more detail, the partnership will continue to invest to improve the town centre and encourage new trade". The implementation and opening of the scheme is unknown at this early stage.

4.18 In **Guildford**, PRUPIM – now rebranded as M&G Real Estate – have revisited the retail-led redevelopment aspirations for the North Street site. In a statement released in January 2019, the Council Leader noted that the Council and its partner M&G Real Estate are now proposing a mainly residential development in response to the challenging retail climate. The retail need figure of 41,000 sq m incorporated into the draft Local Plan was now deemed out of date and inconsistent with the national economy and town centre trends. Plans are yet to move forwards and timescales are unknown.

4.19 In **Kingston**, planning permission (Ref: 15/13063) was granted for the redevelopment of the Eden Walk Shopping Centre in December 2016. The scheme will comprise c.18,000 sq m of A1-A5 retail and leisure space, a boutique cinema, new dining terrace and cafes – including a 'Sky' restaurant – and 385 apartments. We understand that preliminary piling works commenced during the summer (2019) indicating the commencement and implementation of the permitted scheme. This will strengthen and consolidate the town centre offer in Kingston and might create a greater level of competition for Epsom Town Centre. The exact mix and composition remains unknown, and might – given retailer trends – move to a greater level of food/drink/leisure, for example.

4.20 In **Sutton**, the gas holder site planning permission has since been implemented (Ref: B2013/68306) at the far north of the high street. The scheme comprised 177 residential flats, nine town houses, a 12,221 sq m gross foodstore – now occupied by Sainsbury's – a district heating centre and public realm improvements, including a new public square. The foodstore is open for trading and ground floor units on High Street are occupied by Cosa, EasyCoffee, Thegymgroup.com, Magnet Kitchens, Project Design and Poundstretcher.

4.21 In January 2017, Sutton Council commenced the implementation of improvements to Market Place Sutton, delivered through £500,000 of central government funding to assist in improvements to the northern end of the pedestrianised High Street. Key projects have included improving shop fronts and upper facades as 'blocks' rather than individual units, tidying up and investing in the public realm and a programme of events. In June 2016, Sutton Council published the Town Centre Masterplan, with a focus on three key development opportunity sites including new development and improvements to street activity at the St Nicholas Shopping Centre, redevelopment of the Civic Centre for a mix-use scheme including new spaces for arts, culture and entertainment, and redevelopment of Sutton Train Station to include employment space.

4.22 Further projects identified in the Sutton Masterplan include the creation of a new South London destination with culture, leisure and restaurant activity, with the area to the south of St Nicholas becoming a focus for independent restaurants, outdoor arts and festivals. They plan to create an enhanced residential neighbourhood at the north of the town centre, and to transform the gyratory into an urban boulevard lined with high quality buildings, street front activity and town centre living.

Summary

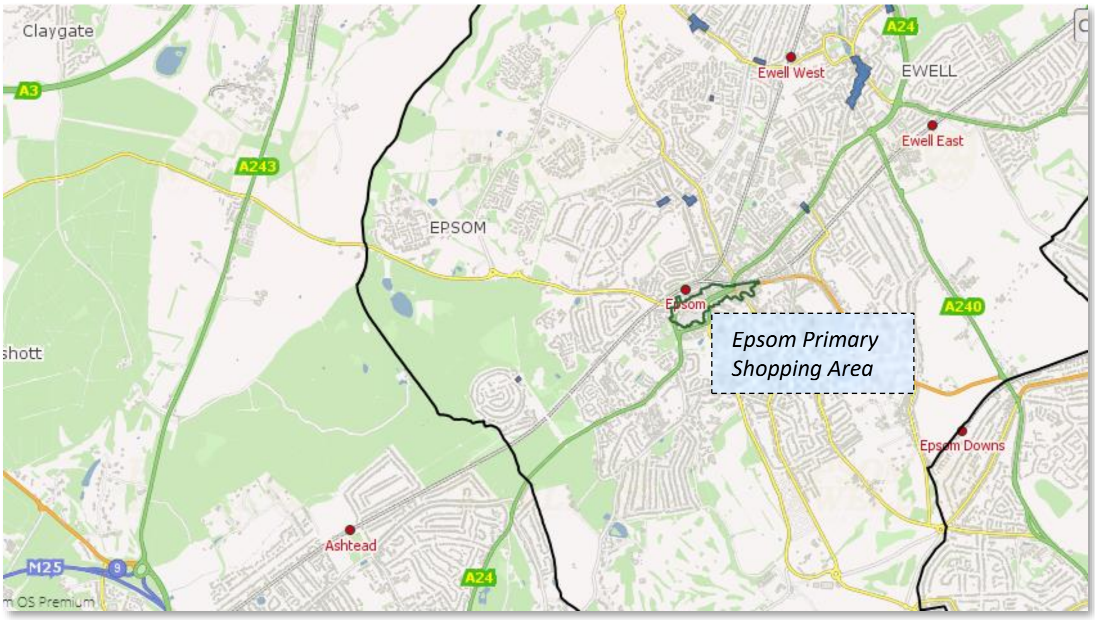
- Kingston and Sutton continue to draw greater levels of comparison goods trade from the Zone 1-12 Survey Area when compared to Epsom Town Centre, reflecting their scale and higher order shopping roles. The evidence demonstrates, however, that Epsom is the only town centre that has grown its market share (within Zone 1-12) over the last 11 years at the expense of all other shopping destinations. Epsom has consolidated its position and clawed back lost trade – a particularly strong performance and vitality indicator. This achievement has taken place within a difficult economy, when many towns are struggling to retain previous levels of vitality and viability.

- Moving forwards, Kingston, Croydon, Guildford and Sutton all had major retail/town centre expansion plans. In light of economic circumstances and the declining health of the retail sector in recent years, Croydon and Guildford have halted schemes for review with an emphasis on residential led schemes and a substantial scaling back of retail. Kingston continue to move forwards with the redevelopment of the Eden Shopping Centre, although the final mix of Use Class A is unknown but likely to reflect a scaled-down A1 floorspace element. Sutton have identified town centre development sites, but none are likely to incorporate a substantial level of floorspace.
- There is a clear opportunity for Epsom to retain – if not improve – market share still further over the next 5-10 years through a continued pro-active strategy of investment, partnership working and a robust policy framework. This is discussed further in the final section of this report.

5. Epsom Town Centre

5.1 The composition and health of Epsom Town Centre was previously analysed in the 2009 Retail Study and 2015 Retail Study Update. This Study (2020) provides an up-to-date analysis of the health of Epsom Town Centre, drawing on desk-based research, detailed on-site surveys, and data obtained from the Council. The outputs provide an opportunity to understand how Epsom has changed in respect of the key vitality and viability indicators over the last 10/15 years, and how the centre is currently performing.

Epsom Town Centre Primary Shopping Area and Context Plan [Proposals Map Extract]



Previous Evidence Base

2009 Retail Study

5.2 In 2009, Epsom was identified to be a healthy town centre performing adequately in a number of key areas. Across the town centre, representation from comparison goods retailers and leisure and service businesses was strong; it had improved its position in the national retailer demand rankings, Prime Zone A rents had remained unchanged, retail yields had improved and vacancy rates were low.

5.3 The Study did identify areas for improvement and consolidation over the LDF period, preventing the centre from slipping into a lower order 'clone' town. Epsom had, for example, fallen in the Javelin (leading consultants in data intelligence and sector analysis) rankings of town centres reflecting the failure to improve the range and mix of higher order retailing; the proportion of convenience goods floorspace was below the national average; there were a number of heavily trafficked road junctions and barriers to pedestrian movement; usage of the Town Centre in the evenings was low; and the Town Centre faced strong competition from out-of-centre floorspace, notably the Sainsbury's at Kiln Lane.

5.4 The retail offer at that time comprised a high number of mid-range multiple retailers, but the representation from higher quality multiples and niche/specialist and independent retailers was weak and showed no signs of improvement. In 2009, this was concluded to be partly a consequence of the recession and partly the characteristics of constrained retail floorspace within shop units. High Street eastern end had recently lost two key anchors, Woolworths and Boots; albeit Boots did remain in the town centre, relocating to the Ashley Shopping Centre.

5.5 The 2009 report concluded that the greatest threat to Epsom wasn't necessarily the larger centres, which will inevitably continue to trade at a higher level, but rather the decline of its own retail offer and the proliferation of fast food take-aways and charity shops, for example. The report recommended that overcoming traffic congestion and encouraging ease of pedestrian movement throughout the town centre should form a crucial element of the forthcoming Area Action Plan (Plan E).

2015 Retail Study Update

5.6 The 2015 Retail Study reported that the implementation of Plan E (2011) was already having a positive outcome. Epsom was continuing to perform well, with a falling vacancy rate, a strong proportion of multiple comparison retailers, evidence of business investment/refurbishment, and a large number of new, good quality businesses, all contributing to a wider town centre mix. The restriction of A5 take-away businesses across primary and secondary shopping frontages had shown signs of success, and the Council had secured substantial funding for highway and public realm improvements.

5.7 The Council's firm policy stance on town centre consolidation and the restriction of out-of-centre development had enabled a positive focus on encouraging town centre enhancement, retailer representation and footfall. The fall in the number of convenience goods operators was – at that time – of concern, particularly as the number of such businesses was already below the national average. It was recommended that this be monitored, and existing businesses protected.

5.8 In terms of specific operators, it was noted in 2015 that The Albion, Marquis of Granby, Slug & Lettuce, Clintons Cards and Kingfish Fish & Chips had all undergone major refurbishment, and Skyrah Beauty Salon on Upper High Street had moved in to a new, larger unit. The HMV unit had been re-occupied by Sports Direct, and 'Hotter Shoes' had moved into the vacant Ann Summers unit. Between the 2009 Retail Study and the 2015 update, a substantial number of new operators had moved into the centre, including:

- Cabello (A3)
- Guitar Guitar
- Stormfront (Apple/Computers)
- Bills Restaurant (A3)
- Hotter Shoes
- Pandora Jewellers
- Sports Direct
- Metro Bank
- Jones Bootmakers
- Pure Gym
- Costa Coffee, Ashley Centre
- Costa Coffee, Odeon
- Costa Coffee, Epsom Station
- Muffin Break (A3)
- La Piccola (A3)
- Roosters Piri Piri
- Mountain Warehouse
- Nandos
- Smiggle Stationery
- Black Burgers

5.9 The mix of new operators listed above represented strong, good quality businesses. 'Guitar Guitar' is the largest guitar shop in the UK, and is a flagship store anchoring the far eastern end of 'High Street East', providing a good retail 'link' with Upper High Street. Cabello and Bills introduced an 'all day' family friendly eating experience, offering breakfast, brunch, lunch, afternoon tea and dinner, and both were successful in meeting a gap in this type of higher end/quality A3 use. Bills is a key footfall driver to the west of the town centre on South Street, and Cabello is a good anchor at the eastern end.

5.10 The key contribution of such operators (in the A3 Use Class category) to the town centre is full daytime trading hours throughout the entire day, i.e. Bills is open from 8.30am-10pm, and Cabello Lounge is open from 9am-11pm, thereby ensuring daytime and evening footfall to the benefit of the town centre as a whole. Daytime opening hours are key to the vitality and viability of main shopping areas, particularly Primary Shopping Frontages.

5.11 The introduction to the Town Centre of a strong selection of good quality operators between 2009 (the previous Household Telephone Survey) and 2019 (the most recent Household Telephone Survey) assists in explaining the reason Epsom Town Centre has improved its performance in respect of market share retention – as identified in Section 4 of this report. Floorspace performance is discussed further in Section 8.

5.12 The Town Centre had retained House of Fraser, M&S, Next, Monsoon, New Look, The Body Shop, TK Maxx, Wilkinsons, WH Smiths, Fat Face, Boots the Chemist, Evans/Dorothy Perkins, Clarks Shoes, Superdrug, and H Samuel as key anchor tenants and footfall drivers. In terms of foodstores, Waitrose and M&S Food were still represented in the Ashley Centre, Co-op had two stores on Upper High Street and Waterloo Road, and Tesco Express had recently been introduced as part of the Epsom Station redevelopment.

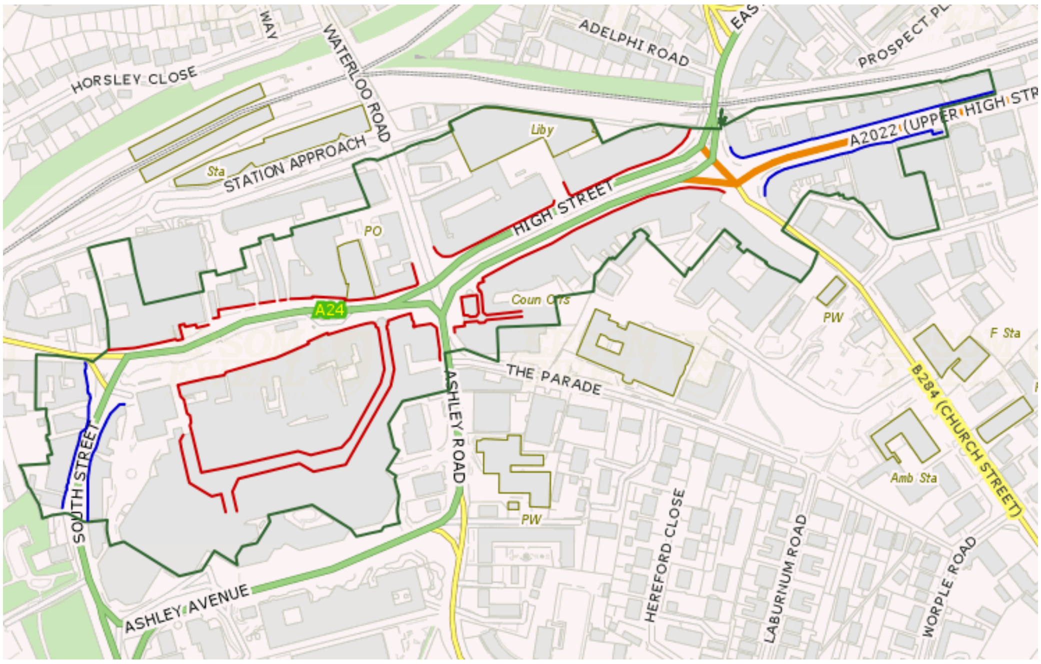
5.13 Moving forwards, the report recommended that the Council continue to focus on prioritising pedestrian circulation and frontage integration, particularly on High Street Eastern End. Case study concepts presented were highlighted as exemplars with recommendations to implement alongside frontage improvements in order to substantially benefit the retail environment on High Street Eastern End. These 'grassroot' improvements were highlighted as key to enhancing the retail offer at a future date.

5.14 The development sites within the Primary Shopping Area which remained available and suitable for redevelopment at that time included Site 4: Upper High Street – East End Site, Site 6: TK Maxx Urban Block, and Site 7: Woolworths/QS Clothing.

Diversity of Uses

5.15 The health check and audit of Epsom Town Centre (2020) has been undertaken within the Primary Shopping Area boundary as illustrated by the green line on the proposals map extract below. The Primary Shopping Frontage is illustrated using a red line, and the Secondary Shopping Frontage is identified with a blue line. Section 9 of this report concludes whether these allocations remain appropriate in the context of the evidence, analysis and subsequent findings.

Epsom Town Centre Primary Shopping Area [Proposals Map Extract]



Note: Primary Shopping Frontage: Red line / Secondary Shopping Frontage: Blue line

5.16 Based on the latest survey undertaken by Experian Goad (November 2018), Epsom Town Centre currently comprises 664,900 sq m gross of retail and service floorspace across occupied and vacant units. Tables 5.1 and 5.2 below set out the diversity of retail and service units in Epsom town centre compared to the national average in respect of town centre composition.

Table 5.1: Epsom Town Centre Composition of Uses (Units)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	21	7.1	9.2	-2.1
Comparison	85	28.8	29.6	-0.8
Leisure Service	68	23.1	24.4	-1.3
Retail Service	49	16.6	15.0	1.6
Financial & Business Service	39	13.2	9.9	3.3
Vacant	33	11.2	11.7	-0.5
Total	295	100	100	-

Table 5.2: Epsom Town Centre Composition of Uses (Floorspace sq m gross)

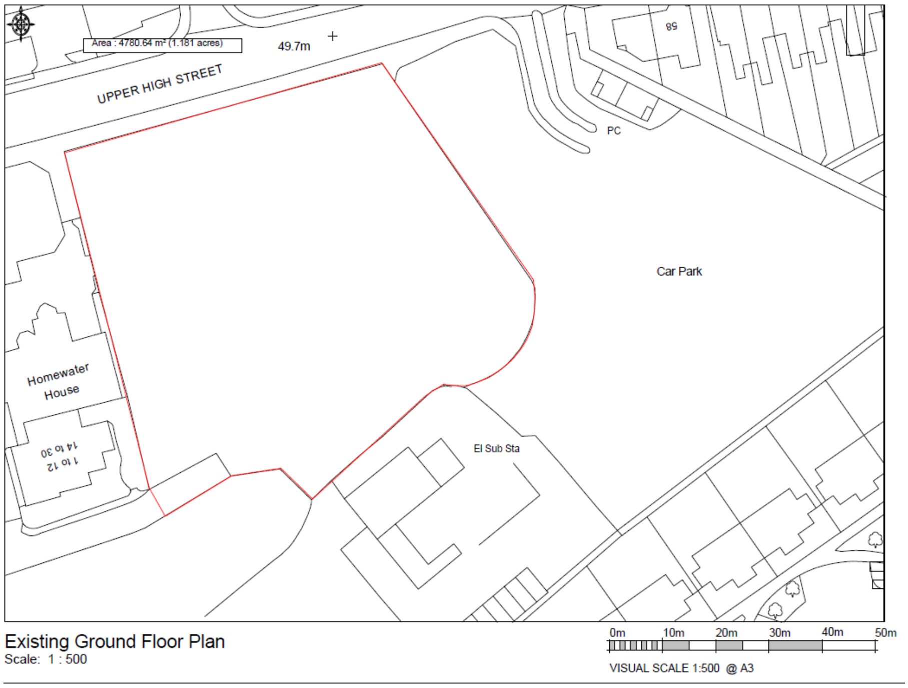
	Floorspace	% of Total	UK Average (%)	Variance
Convenience	55,500	8.4	15.4	-7.0
Comparison	281,000	42.3	33.8	8.5
Leisure Service	158,300	23.8	25.5	-1.7
Retail Service	45,800	6.9	7.0	-0.1
Financial and Business Service	61,600	9.3	7.4	1.9
Vacant	62,700	9.4	10.3	-0.9
Total	664,900	100	100	-

5.17 ***'Convenience Goods'*** provision in Epsom Town Centre is marginally below the UK national average, accounting for 7.1% of total units (compared with the national average of 9.2%) and 8.4% of total floorspace (compared with the national average of 15.4%). Main foodstore representation in the Town Centre remains largely unchanged from previous evidence base studies with M&S and Waitrose both represented in the Ashley Shopping Centre, two Co-op stores on Upper High Street and Station Approach, and a Tesco Express store within Epsom Station.

5.18 Remaining convenience stores are occupied by a mix of businesses including the good quality 'Ben's Butchery' on Upper High Street, Greggs Bakers on the main High Street, Gillespie's bakery on West Street, a number of vape/tobacconist stores, confectionary stores (Hotel Chocolat and Hatty's Sweet Shop), and four health food shops distributed across the town centre.

5.19 On 6th March 2018 Epsom and Ewell Borough Council granted planning permission (Ref: 17/00001/FUL) for a new Lidl foodstore on part of the Plan E Depot Road/Upper High Street development site (see site location plan below). The permitted scheme, which is just outside the Primary Shopping Area, comprises a mixed-use development including a full-sized Lidl foodstore (1,427 sq m net) and 30 residential apartments. The scheme, fronting Upper High Street, has not yet commenced and the vacant site remains boarded-up. The site currently falls outside the Experian Goad survey area (and Primary Shopping Area), but if implemented the store could push Epsom more in line with convenience goods national average levels.

Depot Road/Upper High Street Site Location Plan Ref: 17/00001/FUL



Note: Mixed use residential and Lidl foodstore development

5.20 The ***'Comparison Goods'*** (non-food) offer is marginally below the UK national average in terms of number of units; 28.8% compared to 29.6%. The proportion of floorspace allocated to comparison goods is, however, substantially above the UK national average; 42.3% compared 33.8%, suggesting comparison goods operators are occupying larger than average unit sizes. This is likely skewed by the dominance of larger units and comparison operator representation in the purpose built Ashley Centre, which is performing particularly well at the current time; but good sized units are available throughout the remainder of the town centre, occupied by long-standing operators – Fat Face, TK Maxx, Wilko's, Lakeland, and JD Sports, for example.

5.21 The Experian Goad Category Report (2018) provides a finer grained break down of the sub-categories of comparison goods which highlights the above average number of booksellers, carpets and flooring, general clothing, cycles and accessories, department and variety stores (Robert Dyas/Wilko/M&S/House of Fraser), toys and games, musical instruments and greeting cards. It is evident, however, that Epsom has a below average provision of ladies and menswear and accessories and footwear.

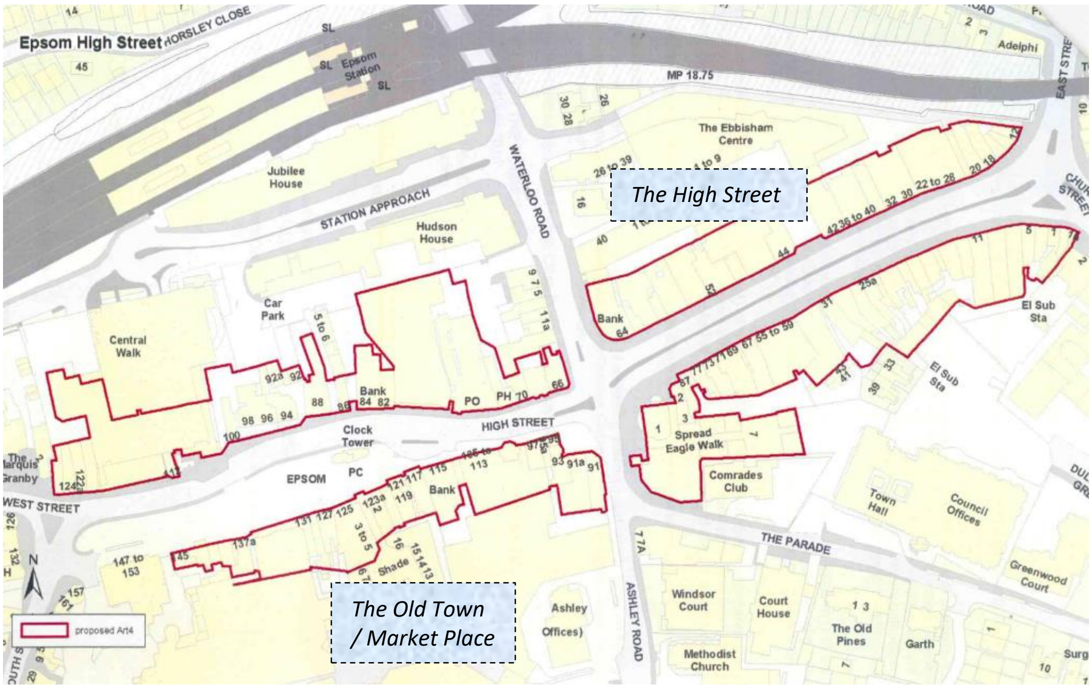
5.22 The level of change and introduction of new retail operators to Epsom Town Centre has slowed since the period between 2009 and 2015 (as listed above), but aside from Hotter Shoes and Mountain Warehouse all new operators identified during that period remain open and trading. The key retailer to open in the last 4/5 years is Waterstones book shop on High Street, a newly branded high-quality retailer with substantial footfall benefits for this part of the High Street close to Fat Face. Popular brands Kiko cosmetics and Trespass outdoor clothing have also recently opened in the Ashley shopping centre.

5.23 Epsom has retained key anchor multiple retailers including M&S, TK Maxx, H&M, Next, Monsoon/Accessories, New Look, House of Fraser, White Stuff, Fat Face, Wilko's, Clarks, Boots, Superdrug, Lakeland and Jones the Bootmakers. Whilst this is a strong grouping of operators, the figures suggest representation is below the national average in the clothing categories, identifying a potential opportunity for Epsom to accommodate more of this type of retailer.

5.24 Comparison goods retail composition in Epsom Town Centre is mid-range and falls short of a more extensive range of higher end operators of the type found in Reigate and Kingston, including clothing and footwear operators. These include, for example, White Company, Cath Kidston, East, Jigsaw, Hobbs, Space NK, Warehouse, Mint Velvet and French Connection. A town centre strategy should continue to seek representation from such operators, but proximity to towns already represented and size of town might affect business decisions in respect of target locations. Town centre partners should target conversations with these operators to understand their requirements.

5.25 ***'Financial and Business Services'*** has the least number of units in the town centre (39), but is above the national average, 13.2% compared to 9.9%. This category comprises banks, building societies, estate agents, financial and legal services and employment and career centres, all of which fall within the Use Class A2 category. An Article 4 Direction introduced in October 2015 removed permitted development rights from Use Class A1 to Use Class A2 across much of the town centre (see plan below). The evidence suggests that, whilst Use Class A2 adds to the diversity of a town centre, the Article 4 Direction is needed to prevent any further introduction of such uses across Epsom town centre, particularly in key High Street areas.

Epsom Town Centre Article 4 Direction Boundary (Defined October 2015)



5.26 The second largest retail category – after comparison goods – is **'*Leisure Services*'** occupying 68 retail units across Epsom town centre. This is equivalent to 23.1% of total units in the town centre, almost in-line with the UK national average (24.4%). A finer-grained analysis suggests a positive and healthy mix with an above average proportion of cafés, cinemas and theatres, nightclubs, and restaurants, and a below average proportion of betting offices, fast food outlets, public houses and sport/leisure facilities.

5.27 Development management policies appear to have been successful in preventing the proliferation of fast food outlets and betting offices. Recent additions to the town centre café/restaurant offer have instead included Creams on High Street, Prezzo on High Street, Pret a Manger at the Spread Eagle junction, Yo Sarnie Upper High Street, and Il Grande Epsom Square. Mainstream restaurant operators present in 2015 and which continue to trade include Ask, Café Rouge, Bill's, Pizza Express, Nando's, and Blacks Burgers. The fast food chain, KFC, achieved planning permission at appeal (Ref: APP/P3610/W/18/3205266) and is now located at 17 High Street. We discuss this appeal decision in more detail later in this section.

5.28 Those restaurant and café operators listed above all offer full daytime trading hours, with direct footfall benefits to the wider town centre retail offer and overall vitality and viability. Daytime opening hours are key to the vitality and viability of main shopping areas, particularly Primary Shopping Frontages. Restaurants which have a more evening trading focus are located within the identified policy defined 'leisure' character areas of Epsom town centre, notably South Street and Epsom Square. These include Blacks Burgers, Epsom Square (12pm-10pm); Epsom Thai, South Street (12pm-3pm); Indian Flame South Street (evening only); Makiyaki South Street (12-2.30pm); and Everest Spice Epsom Square (evening only). Evening economy restaurants should be located in the leisure quarters of South Street and Epsom Square only.

5.29 Epsom Town Centre benefits from offering strong leisure visitor attractions including Pure Gym, Epsom Playhouse Theatre and the Odeon Cinema. Planning permission (Ref: 18/01556/FUL) has recently been granted for a new six screen Picture House cinema in Epsom Square, offering bar, restaurant and kiosk area and party room; whilst the existing Odeon on Upper High Street has recently undergone substantial investment to convert to an Odeon Luxe branded cinema with cushioned reclining seats, tables, bar and additional leg-room.

5.30 ***Retail services*** occupy 49 units in Epsom Town Centre, 23.1% of the total compared to the UK national average of 24.4%. The figures suggest there is not an over dominance of this goods category, but that the category itself is dominated by health and beauty salons (34 units / 70% of retail service units). Hair and beauty salons fall within Use Class A1 and are, as a consequence, difficult to restrict through development plan policies. Alternative businesses include a small selection of dry cleaners, opticians and the Post Office on High Street.

Diversity of Uses: Town Centre Change 2009-2020

5.31 Table 5.3 below, compares the town centre composition by number of units since 2009. It is evident that over this period, the proportion of convenience goods and service operators has remained relatively stable across the Town Centre. The analysis of trends does, however, highlight the significant fall in the number and proportion of comparison goods operators over the last 11 years (from 114 to 85) with the most significant fall in the last 5 years. There has also been an increase in vacant units from 22 to 33 over the same 11-year period. The up-to-date qualitative overview (2020) has highlighted that the proportion of comparison goods operators now falls below the UK national average (Table 5.1) and can be identified as a vulnerable town category.

Table 5.3: Epsom Town Centre Diversity of Uses by Number of Units 2009-2020

	No.of Units 2009	% of Total 2009	No.of Units 2015	% of Total 2015	No.of Units 2020	% of Total 2020
Convenience	22	7.2	18	6.1	21	7.1
Comparison	114	37.3	104	35.1	85	28.8
Service	147	48.1	156	52.7	156	52.9
Vacant	22	7.1	18	6.1	33	11.2
Total	**306**	**100**	**296**	**100**	**295**	**100**

5.32 A more focused review of national multiple comparison goods operators is more positive. The analysis has highlighted that whilst the number of comparison goods units has fallen, the amount of comparison goods floorspace remains above the national average; this suggests operator retention from those occupying larger floor plates – most usually national multiple retailers. This finding is supported by the earlier retailer representation analysis which highlighted the ability of Epsom to retain the strong mix of national multiple comparison goods operators over a mid to long term timeframe.

5.33 This key finding in respect of multiple retailer retention was also evidenced in the 2015 Retail Study update. The 2015 update highlighted that whilst the representation of national multiple comparison goods retailers had remained strong, it was recorded that in the previous study (2009), multiple retailers in Epsom made up 70% of the comparison shopping offer, and in 2013 this figure was 65% - only a small drop. Experian Goad recorded this figure to have increased to 67% by November 2018 (See Table 5.4 below). This is a particularly positive vitality and viability indicator in today's national market context.

5.34 Experian Goad define a multiple outlet/major retailer as follows:

> *"A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers are often sufficient in itself to attract consumers to a centre."*

Table 5.4: Epsom Town Centre % of Comparison Goods Operators within 'National Multiple' Category

2009	2013	2018
70%	65%	67%

5.35 This analysis suggests that whilst Epsom has experienced a substantial fall in comparison goods operators over the last 11 years, it has succeeded in retaining the major key attractors so crucial in underpinning Epsom as a town centre of choice for the local catchment area.

5.36 Nevertheless, the trend has been one of decline, and the proportion of comparison goods operators has now fallen marginally below the UK national average. A continued trend and a similar fall in the number of comparison goods retailers over the next five years could have serious consequences for the overall performance of the town centre in the future. Policy intervention is key to ensuring the protection of Use Class A1 comparison goods operators over the forthcoming Local Plan period.

Use Class Composition

5.37 The Council's adopted development plan (discussed in Section 2) confirms that the overall percentage of Use Class A1 within the Primary Shopping Frontage should not fall below 66%. During 2018, the Council prepared an analysis of Use Class within the Primary Shopping Frontage, the outputs of which are set out in Table 5.5 below. The analysis segmented different parts of the frontage for the purposes of comparison and also concluded the total figures across the full frontage.

5.38 The analysis demonstrates that only two areas of the Primary Shopping Frontage currently fall above the percentage threshold of 66%; including High Street East (northern side) and the Ashley Shopping Centre. This demonstrates the importance of these two areas to the contribution of Use Class A1 to the town centre mix, and retained vitality and viability of the Primary Shopping Frontage. All four remaining parts of the frontage fall considerably below this threshold, but the high percentage in the Ashley Shopping Centre pushes the total marginally above the Development Plan policy threshold. If the Ashley Shopping Centre – as a separately managed entity – is excluded from this analysis, the overall percentage drops considerably to 58% (Table 5.5).

Table 5.5: Epsom Town Centre, Use Class A1 Analysis within Primary Shopping Frontage

Primary Shopping Frontage	Number of Units	Number of Units in Use Class A1	% of Units in Use Class A1
High Street East (Northern Side)	24	16	67.0
High Street East (Southern Side)	29	17	59.0
High Street West (Northern Side)	22	11	50.0
High Street West (Southern Side and Market Place)	19	9	47.0
Ashley Shopping Centre	46	41	89.0
Spread Eagle Walk	3	1	33.0
TOTAL	**143**	**95**	**67%**
TOTAL (Excluding Ashley Centre)	**98**	**56**	**58%**

5.39 The robustness and flexibility of the development plan frontage policies have recently been tested at appeal. In 2018, KFC applied for planning permission for the change of use of ground floor and first floor from retail (Use Class A1) use to a mixed restaurant and hot food take-away use (mixed A3/A5 use). The Council refused the application on the following grounds:

> *"The proposed change of use of from A1 (Retail) to a mixed A3/A5 use, would be an inappropriate use in the Primary Retail Frontage, resulting in a proliferation of non-A1 uses in an important frontage in the Primary Retail Area, contrary to Policy E4 of Plan E (Epsom Town Centre Area Action Plan 2011) and Policy CS14 of the Core Strategy 2007."*

5.40 KFC appealed the decision (Ref: APP/P3610/W/18/3205266) and received planning permission in March 2019. The Inspector noted that Policy E4 of the Local Plan (LP) states that within Primary Shopping Frontages, the percentage of use Class A1 units shall not fall below 66%, and that the Council will actively encourage a higher proportion than 66%. The Inspector added that Policy E4 also states that uses other than A1, A2 and A3 will not be permitted.

5.41 In drawing her conclusions, the Inspector recognised that the percentage of A1 uses across the entire Primary Shopping Frontage is around the policy threshold of 66%, and whilst some stretches had a significantly lower level (than 66%), the appeal site is located in a stretch which is just over the policy threshold of 66%; and is in close proximity to the Secondary Shopping Frontage. The Inspector concluded that whilst 'allowing the appeal would marginally decrease the percentage of A1 units along this stretch and in the town centre as a whole, [she] was not satisfied that the resultant level of A1 units would fall below the policy threshold'.

5.42 Overall, the Inspector drew conclusions having regard to development plan policies, but did make additional observations. She noted that if the size and width of Use Class A1 frontages were factored into the calculation, Use Class A1 would substantially exceed the 66% threshold, albeit this approach does not form part of the town centre policy framework. The Inspector also noted the difficulties of marketing/letting the unit; the range of cafes and hot food take-aways in close proximity – which were doing a 'brisk' trade; and the individual character of this stretch of the frontage.

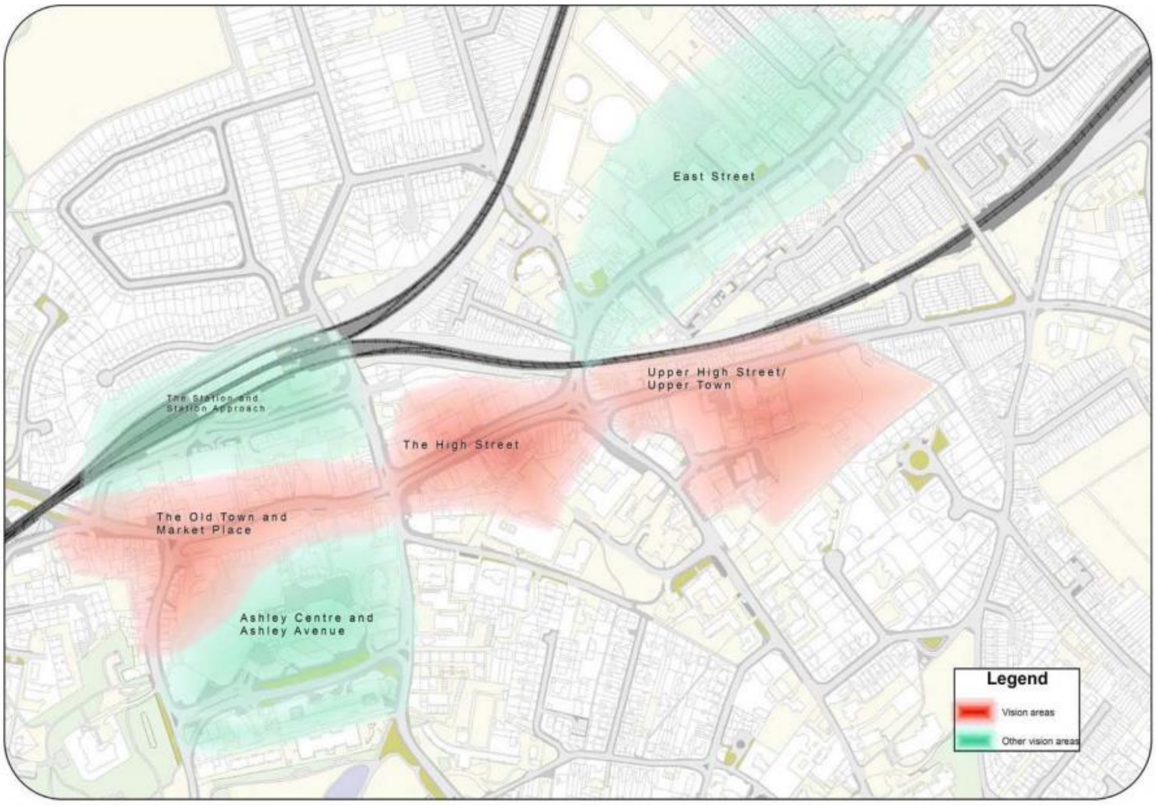
Character Areas

5.43 Retail character areas have been defined in previous evidence base studies and were incorporated into the town centre Area Action Plan, Plan E (2011). An analysis of each separate character area is a useful tool in understanding the vitality and viability of different parts of the town centre in order to form recommendations at a later date. Four retail character areas have been identified within the Primary Shopping Area as illustrated on the Plan E extract below:

- Ashley Centre and Ashley Avenue;
- The Old Town and Market Place;
- The High Street;
- Upper High Street/Upper Town.

5.44 We provide a detailed description of each below.

Epsom Town Centre Vision Areas [Plan E 2011 Extract]



The Ashley Shopping Centre

5.45 The Ashley Centre is a covered shopping mall located within the defined primary shopping area. It was built in the early 1980s, when parts of High Street were also pedestrianised during the construction of the one-way system. The centre is anchored by House of Fraser, Waitrose and Marks & Spencer, and offers the largest concentration of fashion and comparison high street retailing in the town centre. Other retailers include Monsoon/Accessorize, H&M children, H&M ladieswear, Next, Stormfront Apple, Ernest Jones, Boots the Chemist, WH Smith, Trespass outdoor, Smiggle, Claires Accessories, Sports Direct, Kiko cosmetics, Clarks shoes, Toy Barnhaus, Jones Bootmakers, Hotel Chocolat, and Clinton Cards, and a number of units have two floors, aside from House of Fraser which has three.

5.46 There are a number of A3 eating/drinking operators, including Starbucks, Costa Coffee, Bamboo Basket, Muffin Break, and Café La Moka. There is a central coffee shop in the central area. The centre has two entrances onto High Street, effectively creating a retail circuit, with M&S and Boots having double frontages with access to the Market Place.

5.47 The shopping centre is clean and well maintained and provides a popular shopping destination with a central atrium and café area. Pedestrian activity in the centre is strong with the highest footfall counts in the Town Centre, and the units offer reasonable space for the mid-range high street retailers. The shopping centre is within close proximity to the train station and benefits from its own car park with c.800 spaces which also performs the role of a wider town centre car park. The previously vacant Thomas Cook unit has now been occupied by a new travel agency and there are currently no vacant units in the shopping centre. The 'Use Class' composition analysis found 89% of units to be occupied by Use Class A1 operators, substantially above the Primary Shopping Frontage threshold of 66%.

The Old Town and Market Place

5.48 The High Street (Western End) is Primary Shopping Frontage located between the Spread Eagle junction and the junction of West Street/South Street. It comprises a one-way traffic route and wider pedestrianised area on the south side which is occupied by market traders six days a week. This stretch of the High Street has some of the highest pedestrian footfall levels in the Town Centre largely concentrated around the eastern shopping centre entrance/Spread Eagle junction. Double fronted retailers including Marks & Spencer and Boots have entrances inside the Ashley Centre and on High Street which maintains footfall in this general location.

5.49 Retail units on the south side of High Street are generally small and occupied by a range of retail and service businesses including Lakeland, Natwest bank, Nationwide building society, Moss Bros, Café Nero, and Lloyds pharmacy. A number of unit formats on this stretch are smaller in scale, reflecting unit requirements of those comparison goods higher end clothing operators identified earlier in this section. This could be an appropriate frontage with which aspire to attract representation from a small selection, albeit the frontage is currently fully occupied with good quality businesses. A number of buildings are attractive with local and historic interest which maintains the overall environment to a reasonably high quality. The 'Use Class' composition analysis found only 47% of units to be occupied by Use Class A1 operators, substantially below the Primary Shopping Frontage threshold of 66%.

5.50 The north side of High Street is largely dominated by TK Maxx, Carpetright, Barclays Bank, Wilkos, health and beauty and Pure gym. There is a more diverse selection of eating and drinking establishments, with The Marquis of Granby public house, Café Rouge, The Plaice to Eat fish & chips, and Café 1 all dispersed throughout the retail units. Retail units on the north side are generally ad hoc in terms of layout, positioning and format; they are more modern with less character and there might be longer term opportunities for land assembly and redevelopment, i.e. the group of units including TK Maxx westwards through to, but excluding, the Marquis of Granby public house. The 'Use Class' composition analysis found only 50% of units to be occupied by Use Class A1 operators, substantially below the Primary Shopping Frontage threshold of 66%.

5.51 A small selection of multiple retailers maintain footfall in this area of the Town Centre, including TK Maxx and Wilkos, but the large number of units do not act as major attractors for shoppers on their own. The stretch is therefore perhaps vulnerable if one or two major multiples moved or closed down, and there appears little opportunity to attract a greater number of new high street fashion multiple retailers given the size and format of retail units which are likely to be too large for modern requirements. TK Maxx and Wilkos are, nationally, performing well and their departure is unlikely; their retention as operators should be encouraged. Nevertheless, given their scale the Council should begin to consider the long-term role and future of these large sites/units so as to ensure a swift response to changes in the retail market and potential departure of key attractors. Development sites are discussed further in Section 9.

South Street

5.52 South Street forms part of the Old Town character area and is located to the far western end of the town centre. It performs the role of a secondary retail frontage with some of the lowest footfall counts in the town centre, along with Upper High Street, discussed below. This part of the town centre is an identified evening economy leisure quarter, offering a selection of eating and drinking destinations in the form of restaurants and public houses rather than fast food take-aways. These include McCafferty's Bar, Bills, Pizza Express, Epsom Thai, Makiyaki, Indian Flame and Café Viriato. A number of these are closed entirely or partially during daytime trading hours, reflective of the role and function of the character area.

5.53 The street also offers a small range of specialist retailers including Purrfect Pets, Sam Ross Hair, Sew n Sew repairs and alterations, doors and windows, and male grooming and hair boutiques. South Street performs a niche retail and service role in the town centre offering good quality eating and drinking destinations and some specialist shops. This should be protected over the forthcoming Local Plan period from the potential infiltration of Use Class A2, Office B1 and fast food take-aways (Use Class A5) and the promotion of A3 and A4 uses, and specialist A1 independent retailers/high quality multiple retailers that add interest to the town centre retail mix.

The High Street (Eastern End)

High Street

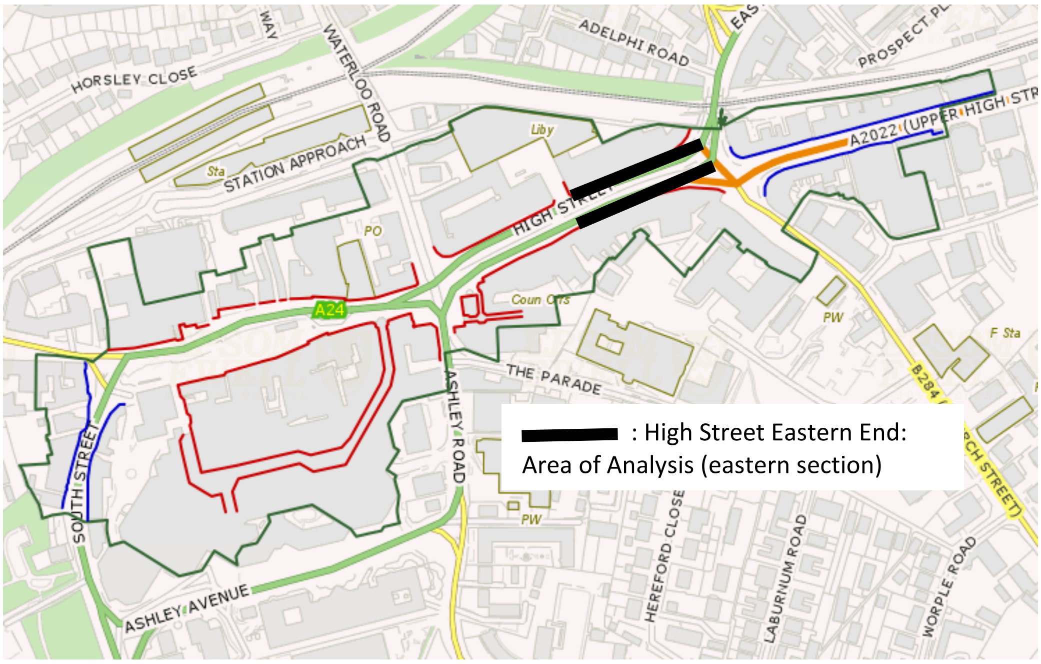
5.54 The eastern end of High Street is located between Spread Eagle junction and East Street/Church Street junction. This stretch falls within the Primary Shopping Area and has some of the highest footfall levels in the town centre similar to High Street: Western End, albeit marginally lower than the Ashley Centre. The retail units offer a format that remains conducive to mainstream high street retailers; historic and attractive in places, although could benefit from investment in external appearance – both at ground and upper floors. High Street Eastern End performs an important role in linking the full extent of the town centre together, from Upper High Street through to the Market Place, and its vitality and viability must therefore be protected and promoted in policy.

5.55 Units are occupied by a range of comparison goods businesses consistent with the identified character area policy framework. Fashion retailing includes JD Sports, Mountain Warehouse and Fat Face, and key attractors are located along the full stretch of the High Street, including Waterstones, Pullingers Art Shop, Games Workshop, Poundland, Savers, Ponden Home, Rymans, Robert Dyas, and Specsavers. The more in-depth Use Class composition analysis (Table 5.5) identifies that the northern side of the High Street is 67% occupied by Use Class A1, whilst the southern side is only 59% Use Class A1. Overall, High Street (Eastern End) has only 63% Use Class A1, lower than the Primary Shopping Frontage policy threshold of 66%.

5.56 The east of the 'High Street (Eastern End)' has come under recent pressure from Change of Use from A1 to A3/A5 uses; the most recent example being the KFC appeal. We have explored and analysed in greater detail the composition of this area (marked by the black lines on the plan below) to gauge its future role and inclusion within the Primary Shopping Frontage.

5.57 The northern section has a strong level of Use Class A1 operators, offering a strong concentration of daytime trading businesses and key anchor footfall drivers. These include Rymans, Savers, Game, Headmasters hair salon, Specsavers, Ponden Home and Pullingers Art Shop, with non-Use Class A1 including McDonalds, Chicken and Banter and Zig Zag independent café. Most operators have occupied units for at least 10 years, and the vacancy rate is very low. The one vacant (corner) unit adjacent to McDonalds and entrance to Epsom Square was previously occupied by Maplins. All but one operator is open for trading from 8/9am through to normal shop closing times or later – without interim daytime closing; Chicken and Banter opens 11am-11pm. This tenant line-up drives a substantial level of footfall consistently observed during regular site visits.

High Street Eastern End: Additional Analysis of eastern section



5.58 In the context of falling comparison goods retailing across the town centre, evidenced earlier in this section, policy should aim to continue to protect the level of Use Class A1 businesses in this northern section as a key part of the Primary Shopping Frontage. Policy should ensure full daytime trading hours consistent with the Use Class A1 retail/shopping character of the area. Eating/drinking leisure uses should be directed to South Street and Epsom Square consistent with their town centre role and evening leisure function.

5.59 The southern section has a lower level of Use Class A1 operators, comprising Robert Dyas, charity shops, a vape shop and hairdressers. Non 'Use Class A1' includes KFC (A3/A5), Cabello Lounge (A3/A4), Prezzo (A3), Subway (A3), and a betting shop, pawnbrokers, and building society. The 'retail' businesses are all – without exception – open full daytime trading hours, including the family friendly eating and drinking operators, ensuring continued footfall and a good link to Upper High Street and the Upper High Street car park. Daytime opening hours are key to the vitality and viability of main shopping areas, particularly Primary Shopping Frontages. Primary Shopping Frontage policy should ensure no further loss of Use Class A1 in this frontage.

5.60 The full stretch up High Street Eastern End offers a strong selection and range of operator underpinning footfall and the vitality and viability of this character area. The physical environment is not conducive to pedestrian movement from one side to the other, largely constrained by heavy 4-lane traffic and a dominant central reservation barrier along the full length of High Street. There are three pedestrian crossing points on this stretch of the High Street, which do assist in circulation.

Spread Eagle Walk Shopping Precinct

5.61 Spread Eagle walk is located at the western end on the junction of High Street and Ashley Road. It is a small retail arcade which has experienced operator turnover in recent years. Argos has left and is now located within the out-of-centre Sainsbury's Kiln Lane; the Argos unit remains vacant and the children's shoe shop closed down following the owner's retirement. The Lester Bowden clothes shop is a prominent, well known ladies and gentleman's outfitter with historic links to Epsom Town Centre. The store has evolved and now stocks high quality brands including Joules, Tommy Hilfiger, Lacoste, Loake Shoemakers, Barbour, Superdry, and Polo Ralph Lauren. The store is also a prominent school uniform provider with links to over 500 schools across the UK.

Epsom Square

5.62 Originally built in the 1990s, the development was known as The Ebbisham Centre, Derby Square and Oaks Square. It opened in 2001 following joint collaboration between the County and Borough to bring a number of related facilities together and to re-energise part of Epsom town centre. The scheme, which followed a £16m investment, incorporates a library and learning centre, GP surgery, lifestyle health centre, centre café and performing arts studio and meeting facilities.

5.63 The site underwent a major re-branding and investment project in 2017 and is now known in entirety as 'Epsom Square'. The built environment was previously tired with evidence of graffiti and old paint work, but the 'overhaul' has addressed these issues. The recent investment into the public realm and eating/drinking and pop up kiosks aimed to fully establish the square as a daytime and evening eating/drinking and café culture destination. Operators include Be at One, Blacks Burgers, Dia y Noche Lounge, El Patio, Esquires Coffee, Everest Spice, Il Grande, Jooby Thai street food, Nando's and Simply Greek. This is a town centre leisure character area and this type of use should be directed here in the first instance, alongside South Street which should be supported in policy to perform the same role and function.

5.64 The development can be accessed from High Street (eastern end) between Creams (crepes, waffles and ice-cream) and the vacant unit previously occupied by Maplin. There is also an entrance leading out to Epsom train station. Epsom Square provides a good variety of restaurants for visitors to Epsom Town Centre, and – if implemented – the recently permitted Picture House cinema will substantially add to the attraction of the area and wider town centre. When let, it would be beneficial for the wider area if the vacant unit on the entrance corner (previously Maplin, Primary Shopping Frontage) opened up frontages on front and side as far as is possible to encourage street level activity and footfall.

Upper High Street/Upper Town

5.65 Upper High Street runs from the junction of East Street/Church Street to the eastern edge of the Primary Shopping Area boundary. Buildings are smaller in scale although historic and interesting in character offering a largely consistent frontage, although shop fascias and building maintenance would benefit from investment. Upper High Street offers a strong mix of operator with anchor tenants including the Odeon Cinema (with Costa), Ben's Butchery and a busy Co-Op convenience stores. This stretch of the Primary Shopping Area also performs the role of a local shopping high street for nearby residents.

5.66 A number of specialist retailers are represented including Dreams Beds, Fudges Cycle Store, Kenneth Broome Photography, Jesters Party Shop, the Tatoo Studio, and the Quality Dry Cleaners. A specialist tutoring college, Kip McGrath, has opened up in one of the shop units, and Epsom Food Express is an international supermarket. Cafes/restaurants include Hunger Hatch, Yo Sarni, Miniature Bar & Grill and Khans Indian; fast food take-aways include Mei House Chinese, Maxi Express Chicken, Dominoes Pizza, Anatolia Kebabs and American Pizza House. A number of hair and beauty salons are represented including Stuart John, Tileys hair, Glamour Garage brows, Jade Nails and Skyrah Beauty. More recently, three fitness centres have opened in shop units – PT Depot, Evolve and Future Fitness.

5.67 We consider this stretch of the town centre offers a good mix of specialist retailers in a more secondary part of the shopping centre. The pedestrian barriers from the Church Street/East junction prevent visitors and shoppers continuing their journey along Upper High Street. Investment in the western part of the town centre – Market Place, South Street, Spread Eagle junction – has now taken place. The focus should not shift to the Church Street/East Street junction and High Street/Upper High Street to develop a better linked and integrated shopping area and much improved public realm and environment.

5.68 This area should be protected over the forthcoming Local Plan period from the potential infiltration of fast food take-aways (Use Class A5), B1 office uses, and A2 financial, business and property services, which would lead to certain decline in vitality and viability. Policy should restrict further A5 uses, and encourage a higher quality and mix of A3/A4 and specialist A1 independent retailers/high quality multiple retailers that add interest to the town centre retail mix.

Town Centre Investment/Change

5.69 Since the 2015 Retail Study Update, focused investment and a number of key changes in the town centre have taken place. With the receipt of funding from Surrey County Council and the Coast to Capital Local Enterprise Partnership – in addition to developer infrastructure contributions – major Plan E focused projects have taken place. This has included the conversion of South Street from a one-way to two-way road, aimed to reduce congestion in the town centre; the widening of pedestrian paving around Spread Eagle junction and improved/safer crossing points; and a major upgrade of Epsom Market Place.

5.70 Investment in Epsom Market Place has included full re-paving, new seating, wayfinding and tree planting, a new drinking fountain, relocation of the Evocation of Speed Statue, and a new location for the proposed Emily Davison statue.

5.71 The Epsom Business Improvement District (BID) was established in 2018 and covers the period 1st April 2018 to 31st March 2023, and is benefitting the town centre through additional revenue and town centre improvement projects. Run by local businesses for local businesses, the most popular ideas and priorities have been chosen through various surveys and meetings of those involved. Through a levy income of around £1.74m over 5 years, projects will relate to marketing and promotion, events, environmental improvements, business support, safer Epsom and parking and accessibility.

Perception of safety & occurrence of crime

5.72 Crime statistics published by Surrey Police provide a snapshot of crime levels in Epsom town centre over a three-month period to July 2019. The data is summarised in Table 5.6 and identifies an average of 89 crimes a month in Epsom town centre. The most common types of crime reported were violence & sexual assault (70 reported crimes), theft (62 reported crimes), anti-social behaviour (50 reported crimes) and shoplifting (40 reported crimes).

5.73 It can be seen from Surrey Police's data that there are particular locations in the town centre where instances of crime appear higher; these include the vicinity of the railway station (where bicycle theft is the most common reported crime), as well as the area north of the High Street around Waterloo Road/Epsom Square. Shoplifting crimes were reported throughout the centre, but particularly in the Ashley Centre, where CCTV is superior and the value of goods higher.

Table 5.6: Reported Crime in Epsom town centre, May-July 2019

	May 2019 reported incidents	June 2019 reported incidents	July 2019 reported incidents
Anti-social behaviour	20	6	24
Public order	8	5	8
Theft	22	21	19
Violence & sexual assault	16	23	31
Shoplifting	12	10	18
Criminal damage & arson	1	3	3
Other crime	7	5	5
Total	**86**	**73**	**108**

Source: Surrey Police website, September 2019

Summary

- The evidence presented demonstrates good levels of vitality and viability across the Primary Shopping Area and highlights specific areas for policy intervention to ensure a continued sound performance moving forwards.
- The level of convenience goods provision has remained stable over the last 11 years, and is only marginally below the national average in terms of operator numbers. The range and choice for the local catchment will be enhanced if the permitted Lidl foodstore scheme is implemented just outside the Primary Shopping Area boundary on Upper High Street. The impact of this store on the town centre operators, and wider town centre performance, should be monitored once open and trading.
- Epsom has a strong mix of mid-range comparison goods retailers, albeit the number of operators in this category has substantially declined over the last 11 years. Despite this trend, Epsom has succeeded in retaining the major key attractors which are critical in underpinning Epsom as a town centre of choice; evidence highlights that the percentage of national multiples within this category has actually increased by 2% in the last 5 years. Policy should aim to halt or reverse the decline of comparison goods operators. It is recommended that town centre partners should target conversations with higher end clothing operators in order to understand their locational requirements.
- The evidence demonstrates a good mix of shopping and leisure facilities, supporting and enhanced and multi-dimensional town centre. Cafes and restaurants are distributed throughout the town centre with improved facilities in Epsom Square, the Playhouse remains a key attractor, the Odeon has invested in a ‘Luxe’ upgrade, and Picture House has received planning permission for a new six screen cinema.
- Financial and business services is the category most in excess of the national average. Predominantly in Use Class A2 it is clear that the Article 4 Direction controlling these uses remains relevant and important in today’s market. Audits of both Stoneleigh and Ewell – discussed in the following sections – have identified a growth in ground floor Use Class B1 across each town centre, and the Development Plan should be pro-active in preventing this trend from emerging within the Epsom town centre Primary Shopping Frontages.
- The Council have retained the overall Use Class A1 threshold of 66% within the Primary Shopping Frontage, although the current level is 67%; and even less at 58% once the Ashley Centre is excluded. The 66% policy was broadly supported and endorsed by the Secretary of State when tested at appeal in 2018. The analysis concludes that each ‘vision/character area’ remains vital and viable with distinct roles. South Street and Epsom Square should be the focus for daytime and evening eating/drinking/entertainment, performing mixed use leisure quarters, with the Ashley Centre and High Street areas protected predominantly for Use Class A1 through the Primary Shopping Frontage allocation.
- Recent major investment has improved the cohesiveness and appearance of the western part of the town centre and also Epsom Square, with more projects planned by the BID team. A focus on safety and security will be important, responding to relatively high reported crime rates. The next phase of investment over the plan period should now focus on eastern part of the town centre including High Street (eastern end), the major Church Road junction and Upper High Street.

6. Stoneleigh Broadway

6.1 Stoneleigh is defined as a Secondary Town Centre in the adopted Development Plan. Lying in the far north of the Borough it is contiguous with Greater London and is located less than half a mile from the London Borough of Sutton administrative boundary and around 1.5 miles from the boundary with the London Borough of Kingston upon Thames. Building of the low-density housing stock commenced in the 1930's following the opening of the railway station, and today comprises predominantly semi-detached suburban houses.

6.2 The main shopping area is The Broadway, a purpose built linear high street built during the 1930's following the opening of Stoneleigh Railway Station [at the western end] in 1932. The railway line runs north/south, with the town centre falling in large part to the east. The town centre does not fall within a Conservation Area and there is just one Grade II listed building – The Station public house at the western end adjacent to the railway line/station. The up-to-date audit undertaken in September 2019 has identified 62 shop units.

Stoneleigh Boundary and Context Plan [Proposals Map Extract]

Diversity of Uses/Retailer Representation

6.3 Within the defined town centre boundary, there are 76 units recorded at ground floor level, although 14 of these are not identified by Experian Goad as a retail, service, financial/business or leisure use, instead being recorded as council and education services (D1/D2) and offices (B1). Table 6.1 below sets out the diversity of uses in Stoneleigh town centre compared to the national average in respect of town centre composition.

6.4 The proportion of ***comparison goods*** retailers in Stoneleigh Broadway is lower than the national average (-6%), which is perhaps consistent with its role as a secondary town centre in the borough. The mix of operator and number of useful 'everyday' businesses is limited, and includes two pharmacies, a pet supplies shop, florist, and an electrical goods store. Other operators include two charity shops, twobathroom showrooms/plumbing services, two window showrooms, a fabric shop, antiques shop, and one good quality ladieswear/accessories shop. The Epsom & Ewell District Scout Shop is also represented, offering a specialist product with only one outlet in the borough.

Table 6.1: Diversity of Uses in Stoneleigh District Centre, 2019

	Number of Units	% of Total	UK Average %	Different to UK Average %
Convenience Retail	8	13%	9%	+4%
Comparison Retail	15	24%	30%	-6%
Retail Services	16	26%	15%	+11%
Leisure Services	15	24%	24%	0%
Financial & Business Services	7	11%	10%	+1%
Vacant units	1	2%	12%	-10%
Sub-Total	**62**	**100%**	**-**	**-**
Other	14	-	-	-
Total units	**76**	**-**	**-**	**-**

Source: Urban Shape site visits, September 2019

6.5 There are eight ***convenience goods*** operators in the town centre (13% of total shops). A Sainsbury's Local store opens until 11pm every day, and offers a bakery and external cash machine; and a Co-op store on the opposite side of the road also offers a bakery and external cash machine, but opens until 10pm every day. The high street has two newsagents, and a good independent foodstore offer including a butcher and wine merchant, and chain bakery store 'Coughlan's'. Consistent with high street trends, Stoneleigh Broadway has one 'vape' shop. The mix and quality of convenience goods stores in Stoneleigh is strong, and likely to form a key overall attractor for the town centre.

6.6 The proportion of ***retail services*** is substantially above the national average (+11%), offering a good range and breadth of operator. These include a Post Office (selling cards, gifts and toys), three dry cleaners, a travel agent, four hairdressers, three beauty/tanning salons, shoe repair shop, carpet showroom, and car accessories. There is no optician on the high street, the closest being located in Ewell Village.

6.7 The proportion of ***leisure services*** (24%) matches the national average, providing 15 operators across the town centre. These comprise a bar, three cafes, The Station pub, three restaurants and six take-aways. There is also a specialist Art Club (Art-K) for children and adults providing a footfall driver for the high street and also a key attractor for those living further afield.

6.8 Seven ground floor units are occupied by ***financial and business services*** including three estate agents, three accountants and one financial planning service. This level of provision (11%) is broadly in line with the national average (10%), but – as is becoming commonplace on smaller higher streets – there are no banks or building societies represented. There is a range of 'other' non-retail businesses which help to generate footfall and linked trips across the town centre; these include a doctor's surgery, dentist, chiropractor, massage therapy, taxi office, dance academy/studio and funeral directors. The library at the western end of the centre is open every day except Wednesday and Sunday, although has reduced opening hours on some days of the week.

6.9 There are seven companies using ground floor units in the town centre as (B1) offices for their small businesses. There is a cluster at the western end of the centre, and others scattered throughout. Combined with the presence of showroom type units these do break up the retail frontage, but also add employee footfall to the high street. Businesses trading from this type of premises should be encouraged to provide active ground floor frontages to their units, and any further change of use to B1 office should be treated with caution.

Change in Use Class Composition

6.10 Drawing on previous data provided by Epsom & Ewell Borough Council, we are able to compare the change in Use Class composition across Ewell Village between the period 2011-2019. Table 6.2 shows that there has been very little change in the composition of shop units within the Use Class A1-A5 categories when analysed by percentage proportion. The proportion of those retail businesses in Use Class A1 has risen marginally since 2011, whilst the proportion of those in Use Class A2 has fallen. The remaining A classes are unchanged (by %).

Table 6.2 Retail & services use change in Stoneleigh district centre, 2011-19

	No.of Businesses 2019	% of Total 2019	No.of businesses 2011	% of Total 2011	Difference (No.of Businesses)
Use Class A1	36	61%	40	59%	-4
Use Class A2	9	15%	12	18%	-3
Use Class A3	6	10%	7	10%	-1
Use Class A4	2	3%	2	3%	0
Use Class A5	6	10%	7	10%	-1
Total Use Class A1-A5	**59**		**68**		
Other	**17**		**5**		
TOTAL	**76**		**73**		

Source: Urban Shape site visits, September 2019 and E&EBC land use maps, 2011

The total number of businesses has increased by three (73 to 76) because three previously large units have sub-divided.

6.11 It is evident, however, that numerically the number of businesses in the Use Class A1-A5 category has fallen by nine from 68 in 2011 to 59 in 2019. This has led to a stronger representation of non-retail businesses on the high street – 17 in total compared to just 5 in 2011. As set out earlier, these uses include offices, health services, the library, a dance academy/studio, an art club, betting office and one vacant unit. The increase in B1 office uses has been the most significant change, introducing a shift away from active shop frontages; however, these are concentrated in the block near the train station adjoining the library creating a 'trade' destination for bathrooms, plumbers and electrical contracting.

6.12 An Article 4 Direction introduced in October 2015 removed permitted development rights from Use Class A1 to Use Class A2, but this does not extend to the full shopping area (see plan below). The evidence suggests that the Article 4 Direction has been successful in preventing the growth / over proliferation of Use Class A2 businesses.

Stoneleigh Broadway Article 4 Direction Boundary (Defined October 2015)

Proportion of vacant street level property

6.13 The on-site audit undertaken in September 2019 identified only one vacant unit (see Table 6.1). This is a vacancy rate of just 2% compared to a national average of 12%, which is a particularly strong vitality indicator. The vacant unit is located on the western side of the station, separated from the main high street – The Broadway. The unit has been boarded up, with the hoarding defaced with graffiti.

Pedestrian flows

6.14 Pedestrian flows are reasonably well distributed throughout the town centre given plentiful free on-street parking for up to two hours along the full extent of the high street. The Sainsbury's Local, Co-Op, Post Office and independent convenience stores effectively anchor the eastern and central part of the high street, whilst the train station and pub (with two rear pay & display car parks) drive footfall to the eastern end. The central and eastern parts of the high street were viewed to be busier around the key anchor retailers and services.

Accessibility

6.15 Stoneleigh Broadway train station is located at the western end of the district centre with egress/access directly onto The Broadway high street, and also onto Station Approach (on the western side) and a very small parade of shops. The station sits on the Epsom to Waterloo via Clapham Junction line. The journey time to Epsom is six minutes, whilst in the London direction, Wimbledon is reached in 13 minutes, Clapham Junction in twenty minutes, and Waterloo in just over half an hour. Services are operated by South Western Railway and run every thirty minutes during the daytime.

6.16 The centre is only served by one bus route – the E16 circular route which runs between Epsom Town Centre and Worcester Park via Ewell and Stoneleigh. The route runs to an hourly frequency, alternating between running in a clockwise and anti-clockwise direction.

6.17 Car parking in the district centre is good and readily available. The majority of parking provision is provided in the form of free (up to 2 hours) on-street bays along the full stretch of the high street. Two additional small pay and display surface car parks are located at the western end of the centre, both adjacent to The Station public house. At the time of our visit, the free on-street parking was well-used, but the pay & display surface car parks were observed to be completely empty, and likely to be used only at peak times when on-street parking is at full capacity. Short stay free car parking supports the vitality and viability of the district centre and its role for local top up shopping.

Perception of Safety & Occurrence of Crime

6.18 Crime statistics published by Surrey Police provide a snapshot of crime levels in the district centre over the three months to July 2019 (Table 5.3). Instances of reported crime in the district centre are relatively low, although consistently across all three months instances of anti-social behaviour were reported on Station Approach, including five incidents reported in the month of July 2019.

Table 5.3 Reported crime in Stoneleigh district centre, May-July 2019

	May 2019 reported incidents	June 2019 reported incidents	July 2019 reported incidents
Anti-social behaviour	1	7	2
Public order	0	0	0
Theft	0	4	0
Burglary	1	1	0
Shoplifting	0	0	2
Criminal damage & arson	0	0	0
Other crime	2	1	1
Total	**4**	**13**	**5**

Source: Surrey Police website, September 2019

Environmental Quality

6.19 The environmental quality of the centre is generally positive, with wide pavements creating a safe environment and encouraging pedestrian movement around the centre. The purpose-built high street provides a broadly uniform architectural style which ensures a consistent height and red brick appearance with signs of 1930's arts and crafts style facades. Whilst there are always opportunities to invest and enhance the public realm, there is seating, tree planting, pavement flower planters and attractive lamp posts.

6.20 Adjacent to the main entrance to the railway station is a small building, likely a former public toilet block, which is no longer in use and has been boarded up. This creates a negative first impression on arrival into the centre from this direction, and the Council may wish to explore options to bringing it back into active use in a form of development which may benefit users of the centre and railway station, for example a take-away coffee kiosk. The small parade of units on the western side of the station has a noticeably lower environmental quality with a prominent vacant unit, poor quality shopfronts and a general feeling of neglect compared to the eastern side of the centre.

Summary

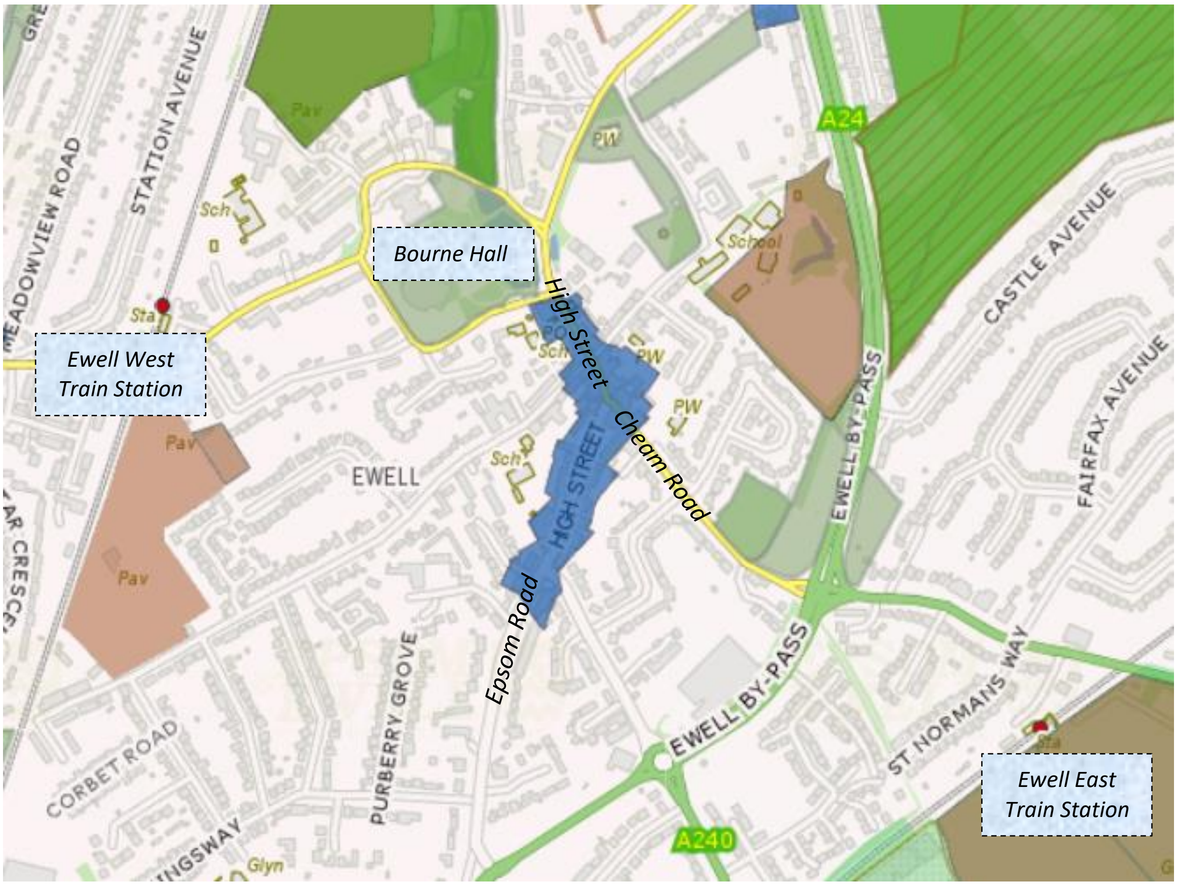
- Stoneleigh Broadway is a wide and pedestrian friendly high street, comprising 62 shop units and benefitting from a plentiful supply of free car parking. The range of shop business is strong offering pharmacies, pet shop, two small convenience stores, a good selection of independent convenience stores, Post Office, dry cleaners, hair and beauty, shoe repair, cafes, restaurants, doctors, dentist and taxi office, for example. Community facilities include the library, dance studio and art studio, and the vacancy rate is particularly low.
- The composition and mix of retailing in the Use Class A category (in % terms) has changed very little over the last 8 years, even – in the face of national trends – experiencing a small increase in Use Class A1 and a decrease in Use Class A2. The key change has been the overall decline in the *number* of businesses in the Use Class A1-A5 categories, with non-A Class businesses now totalling 17 compared to just 5 in 2011. Many of these businesses provide active street frontages and generate town centre shopper footfall including the art club, dance studio, doctors, dentist, and library, for example; but the area of concern is the strong rise in Use Class B1 office space at ground floor. These introduce non-active frontages and any further growth will dilute retail frontages in what is currently a strong and healthy town centre.

7. Ewell Village

7.1 Ewell Village is defined as a Secondary Town Centre in the adopted Development Plan. Lying north-east of Epsom town centre and south of Stoneleigh Broadway, Ewell Village is predominantly linear in nature, running north to south along Epsom Road/High Street, with a small continuation of units on Cheam Road. The up-to-date audit undertaken in September 2019 has identified 66 shop units.

7.2 The town centre lies entirely within the Ewell Village Conservation Area (designated in 1972), and in February 2000 an Article 4(2) Direction was served on all residential properties in the conservation area introducing greater planning control. As noted in Section 2, there are a large number of listed buildings within the Ewell Village boundary, predominantly located on the northern stretch of 'High Street' and around the junction of High Street with Cheam Road/West Street/Church Street. There are also four listed buildings on the southern stretch of 'High Street' (eastern side).

Ewell Village Boundary and Context Plan [Proposals Map Extract]



7.3 Adjacent to the north-western boundary of the centre is Ewell's largest landmark – Bourne Hall, a council-operated facility, housing a library and a mixture of permanent and temporary exhibitions on local history. It is a modernist circular structure also offering a pay & display car park, library and performance and community space for a large range of local activities and clubs. It was Grade II listed by English Heritage in 2015 for reasons of architectural interest.

7.4 The historic foundations of Ewell Village are evident in the built form, but heavy road traffic detracts from the pedestrian environment and ease of shopper movement throughout the centre. These findings are endorsed in the Ewell Village Conservation Area Character Appraisal. The B2200 runs as a through-route from the A24 by-pass towards Ewell West and Horton/Chessington; and three further routes travel towards Ewell Village from the A24 including London Road, Reigate Road and Epsom Road.

7.5 The surrounding area is characterised by low density detached and semi-detached housing, with additional facilities in close proximity including St Mary the Virgin Ewell Parish Church, Ewell Castle School, Glyn secondary school, Ewell West and Ewell East train stations, Homebase and Tesco Esso Express on the A24 by-pass. Ewell is predominantly suburban in character, with the high street performing as the often-congested commercial centre.

Diversity of Uses/Retailer Representation

7.6 Within the defined Village boundary, 74 units were recorded at ground floor level, although 8 of these are not identified by Experian Goad as a retail, service or leisure use, instead being recorded as office (B1) or health care service (D1). Table 7.1 below sets out the diversity of uses in Ewell Village compared to the national average in respect of typical town centre composition.

Table 7.1: Diversity of Uses in Ewell Village Secondary Town Centre, 2019

	Number of units	% of Total	UK Average %	Different to UK Average %
Convenience Retail	3	5%	10%	-5%
Comparison Retail	16	24%	39%	-15%
Retail & Leisure Services	42	64%	38%	+26%
Vacant Units	5	8%	13%	-5%
Sub-total	**66**	**100%**	**100%**	**-**
Other (Offices/Health Services)	8	-	-	-
Total units	**74**	**-**	**-**	**-**

Source: Urban Shape site visits, September 2019

7.7 The proportion of comparison goods units in Ewell Village is substantially lower (-15%) than the national average, although this is perhaps consistent with its 'secondary' – and lower order – status. Unusually in secondary centres there is, however, a good representation (6 units) of ladieswear and children's clothing shops trading as independent, specialist and boutique businesses. These include accessories, specialist hats (millinery), clothing and footwear and a specialist dance shop stocking dance shoes, dance, ballet and gymnastics clothing and bridal/wedding shoes.

7.8 There are no comparison goods national multiple retailers in Ewell Village, but other businesses represented include two chemists, an optician, an art gallery and picture framing, a pet supplies shop, a florist, a charity shop, a kitchen showroom, computer repairs and homewares shop. In total there are 16 comparison goods operators in Ewell Village out of a total of 74 businesses.

7.9 The proportion of convenience goods businesses is lower than the national average (-5%), providing just three foodstores. These do, however, provide a good mix of supermarket, top-up convenience and newsagents, and include a Sainsbury's Local, Co-Op and Safegate News. The small Sainsbury's store is dated with stock range limited in a 'Local' format store. It does have direct pedestrian access to Cheam Road - opposite the main car park – and to High Street, providing a good footfall generator to the central part of the Village. The foodstore closes at 11.30pm Monday to Saturday, and 10.30pm on a Sunday.

7.10 Ewell Village has no independent or specialist convenience stores, i.e. butchers, bakery, greengrocers or off licences. This absence in representation restricts the overall diversity and attractiveness of the town centre, limiting the range and quality of convenience goods on offer.

7.11 Retail and Leisure Services account for 64% of total businesses in Ewell Village (42 units in total), representing the dominant type of trading activity in the town centre. The largest number of businesses

(24) fall within the Retail Services category and is very much dominated by hair and beauty operators (14) including seven beauty salons, three barbers and four hairdressers. Other retail services include clothing alterations, two dry cleaners, two estate agents, a funeral directors, pet grooming, a post office, tattoo parlour and travel agent. There are no banks or buildings societies, but the Post Office has an external wall ATM cash machine; HSBC closed around 8 years ago, whilst Barclays closed in 2015 to be replaced by Costa Coffee.

7.12 There are 18 Leisure Services throughout the village centre, including five cafés, eight restaurants, two betting offices, one public house and two take-aways. The balance towards cafés and restaurants rather than take-aways is a positive vitality indicator, with key long-standing businesses including All Things Nice café, Millroys café, Costa Coffee, the Green Man public house, La Familia Italian, and Hanedan Turkish restaurant. A large unit was occupied by 'The Lounge' on High Street for a short period of time, but closed less than a year after opening. The unit was previously a large furniture shop but currently remains vacant.

7.13 Other businesses falling outside of the retail and leisure categories, but which do add diversity to the town centre, include a taxi office, dentist, physiotherapist, chiropractor, and four offices including loft conversions and alarms.

Change in Use Class Composition

7.14 Drawing on previous data provided by Epsom & Ewell Borough Council, we are able to compare the change in Use Class composition across Ewell Village between the period 2011-2019. Table 7.2 highlights that there has been a considerable loss of Use Class A1 over this period. The two surveys suggest that the decline of Use Class A1 has been the primary cause of a reduction in the total number of retail businesses in Ewell Village from 70 in 2011 to 57 in 2019 (A1-A5 combined).

Table 7.2: Retail Use Class Composition, Ewell Village, 2011-2019

	No. of Businesses 2019	% of Total 2019	No. of Businesses 2011	% of Total 2011	Difference [No. of Businesses]
Use Class A1	32	56%	50	71%	-18
Use Class A2	9	16%	8	11%	+1
Use Class A3	13	23%	8	11%	+5
Use Class A4	1	2%	3	4%	-2
Use Class A5	2	4%	1	1%	+1
Total Use Class A1-A5	**57**		**70**		**-13**

Source: Urban Shape site visits, September 2019 and E&EBC land use maps, 2011

7.15 Two public houses (Use Class A4) have permanently closed (King Willian IV and The Star), with one being replaced by an Italian Restaurant (Use Class A3). The proportion of Use Class A2 and A3 across the town centre has increased significantly over the eight-year period, demonstrating a significant change in composition. It is relevant to note that over half of Use Class A1 businesses have not been subject to a change of use to A2-A5 categories, but have instead been converted to offices, health services, showrooms, residential, other Sui Generis or remain vacant.

7.16 Analysis of the land use audits highlight an increase of just one 'Use Class A2' business, but it is important to emphasise that the figures hide trends within this category. In particular, the nine Use Class A2 businesses comprise seven beauty salons, which replaced (numerically) a more varied representation of betting shops (in 2011 these were Use Class A2 but are now Sui Generis), two banks and a selection of estate agents. The diversity of uses in this category has shrunk considerably. An Article 4 Direction introduced in October 2015 removed permitted development rights from Use Class A1 to Use Class A2, but this does not extend to the full shopping area (see plan below).

Ewell Village Article 4 Direction Boundary (Defined October 2015)

NB: Removes permitted development from Use Class A1 to Use Class A2

7.17 Ewell Village has experienced an overall reduction of 13 retail/leisure units (A1-A5) since 2011, with a noticeable loss around the junction of Cheam Road and High Street. This junction area has diluted the 'flow' and connectivity of the centre, inserting a separation within the frontage between north and south. Key footfall drivers in this location previously included HSBC bank, The Star Public House, Williams Convenience Store, and a wooden furniture shop – all of which have now closed and either remain vacant or have been converted to offices and/or residential.

Ewell Village Area of Diluted Retail/Leisure Activity and Frontage Separation

Vacancy Rate

7.18 Five vacant units were recorded in the Village centre (September 2019). This equates to a vacancy rate of 8%, substantially below the national average of 13% (Table 7.1 above). Two units, previously occupied by The Lounge (bar) and St Raphael's charity shop, are located on the main southern stretch of Epsom Road/High Street. The Lounge is a particularly large unit, previously occupied by a furniture retailer. The former Williams Convenience Store, Sugar Craft/Cake shop, and Easton's Estate agents are all located around the High Street/Cheam Road junction – an area which has experienced a dilution of retail and leisure uses in recent years.

Accessibility

7.19 Ewell is served by two railway stations – Ewell West and Ewell East – each of which is approximately ten minutes' walk from the district centre. Ewell West is served by half-hourly services on the Epsom to Waterloo line, in common with Stoneleigh. Ewell East is served by trains every 30 minutes to London Bridge via Sutton and West Croydon, with a journey time to Sutton of 6 minutes; West Croydon 20 minutes and London Bridge 40 minutes. It is also served by trains every 30 minutes to London Victoria via Sutton (40 minutes).

7.20 Ewell Village benefits from a good level of accessibility by bus, being served by three bus routes which each operate at approximately 20-minute intervals throughout the day:

- Route 293, which runs between Morden and Epsom General Hospital via North Cheam and Epsom town centre [bus stop adjacent/opposite Green Man public house];
- Route 406, which runs between Kingston and Epsom via Surbiton and Tolworth [bus stop adjacent/opposite the Green Man public house];
- Route 470, which runs between Colliers Wood and Epsom via Morden and Sutton [bus stop adjacent/opposite the Green Man public house].

7.21 Ewell Village is also served by the E16 circular route, details of which are provided in the Stoneleigh health check. The centre is also served by an hourly bus (route 467) which runs between Epsom and Hook via Chessington.

7.22 There are three public car parks serving the district centre[3]:

- Rear of High Street – parking cost 80p for two hours, 46 spaces, access road off Cheam Road;
- Dorset House, Cheam Road – parking cost 80p for two hours, 68 spaces. Directly opposite Sainsbury's entrance, accessed from Cheam Road;
- Bourne Hall – parking cost £1.20 for two hours, 101 spaces.

7.23 The number of spaces provided across the three car parks is considered satisfactory, although the car park at Bourne Hall is more detached from the centre and is primarily used by those visiting Bourne Hall, the park/pond area and GP practice/health service facilities adjacent. There is free on-street parking at the southern end of the town centre, at the junction of Epsom Road/Reigate Road, and also outside Co-Op convenience store.

Pedestrian flows

7.24 The central part of the Village (i.e. the southern part of High Street between its junctions with Cheam Road and Epsom Road) benefits from good levels of pedestrian activity, driven by key anchors including Co-Op, Costa Coffee, Dancia, Opticians, pharmacy and All Things Nice café. Free on-street parking at the southern most point of the Village assists in pedestrian movement along this full stretch of prime frontage.

7.25 Pedestrian footfall was observed to decrease considerably on the northern stretch of High Street, north of the junction with Cheam Road. The busy road junctions (High Street with Cheam Road) combined with the more fragmented retail frontage, the poorer quality of many of the units, and a lack of retail attractors are all likely to contribute to the lower levels of footfall. The only daytime footfall driver in the northern part of the Village is the Post Office, the Ewell Spring Pharmacy and to a lesser extent Skin Secrets Beauty Salon.

Perception of Safety & Occurrence of Crime

7.26 Crime statistics published by Surrey Police provide a snapshot of crime levels in the town centre over the three months to July 2019, which are summarised below in Table 7.3 (Source: Surrey Police). The table shows that reported crime within the vicinity of the Village centre was low across each of the three months, indicating that the centre does not suffer from a high crime rate.

Table 7.3 Reported crime in Ewell Village district centre, May-July 2019

	May 2019 reported incidents	June 2019 reported incidents	July 2019 reported incidents
Anti-social behaviour	1	0	0
Public order	2	0	0
Theft	0	0	5
Burglary	0	0	0
Shoplifting	1	0	0
Criminal damage & arson	0	1	1
Other crime	4	3	0
Total	**8**	**4**	**6**

[3] Parking spaces and costs sourced from Parkopedia, information correct as of September 2019

Environmental Quality

7.27 The ‘Ewell Village Conservation Area Character Appraisal’ (2009) describes the wider conservation area – which includes the town centre boundary – as follows:

> *“The Ewell Village Conservation Area lies to the north-east of Epsom town centre, on the line of the A24 (Roman Stane Street) which connects Dorking to London but which now bypasses the village. The extensive conservation area includes the historic Bourne Hall Park, now centred on the 1960’s public library, and the ponds and watercourses which once served two mills. A notable collection of listed buildings form the core of the village, with the best and most complete townscape in Church Street. Despite much Inter-War development, Ewell retains a rural quality due to its many open green spaces, reinforced by the woodland which stretches along the line of the emerging river Hogsmill.” (page 1)*

7.28 Character Area 3 of the Conservation Area Appraisal focuses on Ewell Village centre, describing it as included the busy village centre and crossroads, the main shopping street (High Street) which leads towards Epsom, and the 1930’s commercial properties at the northern end of Epsom Road. The document notes that:

> *“there are many listed buildings facing the cross-roads created by West Street, London Road, Church Street and High Street, some of them surprisingly vacant and ‘at risk’. Along High Street, small vernacular cottages are somewhat dwarfed by insensitive development of the 1960’s and later, which makes up a substantial proportion of the west side of the street. However, this area retains a large number of surviving features which relate to the historic Surrey village of Ewell.”*

7.29 Overall, Ewell Village appears well used, but the pedestrian environment is challenged by the heavy vehicular traffic passing through the main High Street. A number of historic buildings reflect the history of the area and village centre, but this is interspersed with more modern and less attractive 1960’s+ development. Many shop façade’s and listed buildings appear run down and in need of repair and maintenance, with vacant units contribute to a ‘run-down’ feel around the main High Street/Cheam Road cross-roads. The quality of the paved areas and on-street parking areas is generally of poor quality throughout the town centre, detracting further from the pedestrian environment.

7.30 The former HSBC bank has under-gone refurbishment, but whilst improving the environmental quality of this view, the previous retail use has been lost to office/commercial. The building is not listed, benefitting from a more flexible approach to investment and enhancement. There are signs of further investment in this area, with some residential conversions and building refurbishments including The Star (listed building) (previous Public House). The introduction and growth of town centre living would contribute to footfall and the wider health of the town centre. Further investment in the Village’s listed buildings would also contribute to the environmental quality and overall historic appearance of the village centre.

Summary

- Ewell Village has 66 retail/leisure business operators offering a good mix of key services and retail categories required for people’s day-to-day needs. These include chemists, opticians, pet supplies, dry cleaners, Post Office, taxi office, florist, dentist, two small convenience stores and a newsagent, and a good selection of cafés, restaurants, hairdressers and beauty salons. Unusually for a smaller centre, Ewell Village has a selection of clothing and specialist comparison goods operators including a millinery hat designers and dance/ballet/gymnastics clothing and accessories.

- A comparison between the 2011 and 2019 land use surveys has, however, identified a number of changes which should be responded to in the new Local Plan. In particular, the number of retail/leisure businesses has fallen from 70 to 57, with the decline of A1 uses being the primary cause – either through change of use to A2-A5 or to residential, offices, health services and showrooms. Whilst the proportion of Use Class A1 has fallen significantly, the proportion of Use Class A2 and A3 businesses has grown. The increase in beauty salons in the A2 category has been a strong trend, and there are no longer any banks or financial services present; but the number of vacant units and take-aways across the centre is particularly low.
- A key change in the centre has been a noticeable loss of retail/leisure activity around the junction of Cheam Road and High Street. Combined with heavy traffic, this junction area has diluted the ‘flow’ and connectivity of the centre, inserting a separation within the frontage between north and south. The only key footfall drivers in the north of the centre are the Post Office and Ewell Spring Pharmacy, whilst the southern part of High Street remains the prime retail frontage. Observations of pedestrian footfall indicate that few people visit north and south during the same shopping trip/visit.

8. Quantitative Need

8.1 In this section we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the borough. We set out the performance of existing floorspace as the basis for forecasting the need for additional retail floorspace to the period 2032, incorporating interim years of 2022, 2027 and 2032. The quantitative tabulations accompanying this assessment are set out in Appendix 2 (convenience) and 3 (comparison).

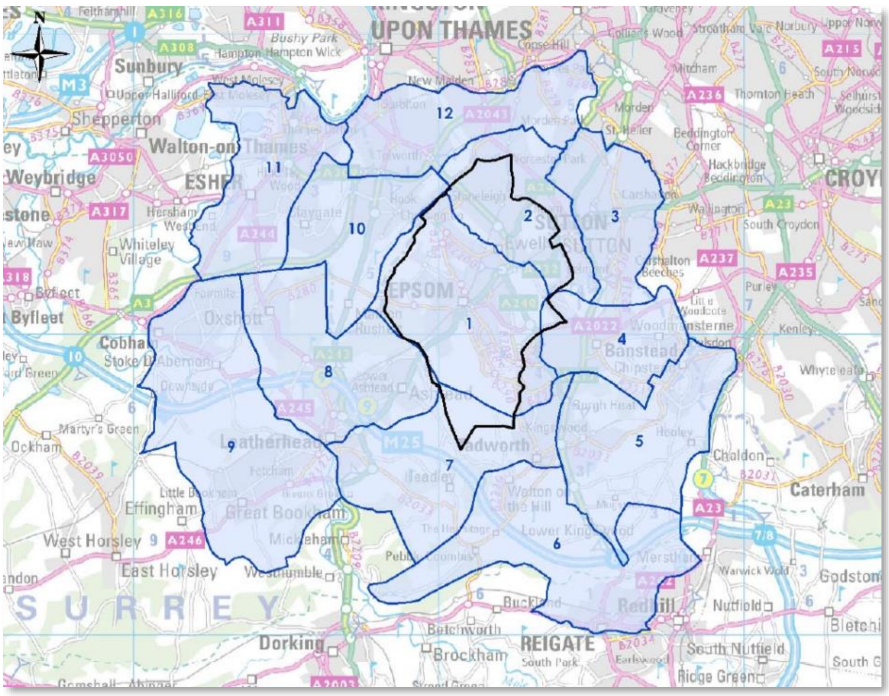
8.2 We have used a conventional and widely accepted step by step methodology, drawing upon the results of the household telephone survey of existing shopping patterns (2019) to model the existing flows of available expenditure to the network of centres and edge/out-of-centre retail provision. To develop the baseline, we have:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Epsom & Ewell study area;
- Allocated the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales;
- Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

8.3 Building on the baseline position, we have explored the need for further convenience and comparison retail floorspace within the Borough, having regard to the identified performance of existing floorspace.

Survey Area and Household Telephone Survey

8.4 In order to identify shopping patterns across the Borough, Urban Shape commissioned a new household telephone survey covering 1,200 households across 12 survey zones. Urban Shape designed the survey questionnaire in consultation with the Council and NEMS Market Research, who undertook the interviewing and data processing in September 2019. The survey area is shown below.



8.5 The survey results (2019) identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been rebased to remove some responses (such as 'don't shop for particular goods' and 'internet shopping') to ensure consistency with categories excluded in the expenditure projections.

8.6 For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% main food / 30% top-up food). This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.

8.7 The household telephone survey also included seven questions on where respondents normally undertake shopping for the following comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure:

- Clothing and footwear;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Audio-visual equipment;
- Personal and medical goods; and
- Recreational and luxury goods.

8.8 In order to determine the composite market share for all comparison goods spending within the survey area, we apply the weighted averages of the household telephone survey results for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of comparison spending for residents in each of the survey zones and is an accepted approach which ensures that market shares for centres and stores are not skewed by any particular goods category.

Population

8.9 Population estimates and forecasts for each of the survey zones are derived using the Experian E-Marketer in-house system. This provides estimates of population based on trend-line projections and the 2011 census for small, localised areas. Overall, the population of the survey area in 2019 is estimated to be 508,473. It is forecast to grow to 524,365 by 2022, 548,712 by 2027, and 570,139 by 2032. This represents an overall increase of 13% over the course of the assessment period.

Available Expenditure in the Survey Area

8.10 The Experian E-Marketer system provides estimates of per capita expenditure for convenience and comparison goods expenditure in 2017 prices. We have made deductions for Special Forms of Trading (SFT) which represent expenditure not available to spend in shops (for example internet or catalogue shopping). The deductions we have applied for SFT for convenience and comparison goods are derived from Experian Retail Planner Briefing Note 16 and are discussed in more detail in Section 3.

8.11 To estimate available expenditure in the survey area, we have applied growth rates based on economic forecasts published by Experian Business Strategies (Retail Planner 16). For convenience goods we have applied growth rates of 0.1% per annum across the assessment period; and for comparison goods we have applied more varied growth rates of 2.8% between 2019 and 2020, 3.3% between 2020 and 2025, and 3.2% onwards.

8.12 Experian note that retail spending will remain on a slower growth trajectory over 2019 and 2020 as consumer confidence will remain vulnerable to the uncertainty surrounding Brexit. The longer-term outlook for convenience goods remains stable at 0.1% and whilst weaker than recent trends, it remains comfortably above the exceptionally weak performance seen during 2007-2014. For comparison goods, the recovery beyond 2020 is expected to gather momentum, but it will be well below the pace of the pre-2007 boom (up to 8.2%) due to wider national and international economic constraints.

8.13 Using the growth rates above and applying relevant deductions for SFT, total available expenditure across the survey area has been grown in five-year intervals (including 2022, 2027) up to 2032. Appendix 2, Table 3 applies per capita expenditure to the population forecasts, which indicates that total available convenience goods expenditure within the survey area is £1.116 billion (2019). This is forecast to grow to £1,162 billion by 2022, £1,216 billion by 2027, and to a total of £1,264 billion by 2032. This equates to an overall growth of £147.6m between 2019 and 2032 (14% growth) (Appendix 2, Table 3).

8.14 Comparison goods expenditure within the survey area at 2019 is £2.056 billion. This is forecast to grow to £2.275 billion by 2022, £2.746 billion by 2027, to a total of £3.323 billion by 2032. This equates to an overall growth for comparison goods expenditure in the survey area of £1,267 million between 2019 and 2032 (62% growth) (Appendix 3, Table 3).

8.15 Longer term projections should be treated with caution due to the potential for changing economic circumstances and growing margins of error over the longer term.

Convenience Goods: Turnover/Shopping Patterns

8.16 Key foodstore provision in the Borough includes the Aldi in Kingston Road Local Centre, Waitrose and M&S in Epsom Town Centre, the Sainsbury's Local and Co-Op in Stoneleigh Broadway, and the Sainsbury's Local and Co-Op in Ewell Village. The main out-of-centre foodstore is the Sainsbury's superstore at Kiln Lane, and there is a network of smaller Tesco Express and Co-Op stores located throughout the borough either in out-of-centre or local centre locations. Table 8.1 lists the main foodstores in the borough by turnover derived from the survey area (Zone 1-12).

Table 8.1: Most Popular Foodstores in Borough by Turnover

	Foodstore	Turnover (£m)	Sequential Location
1	Sainsbury's, Kiln Lane	£81.3m	Out of Centre
2	Aldi, Kingston Road	£37.7m	Local Centre
3	Waitrose, Ashley Centre, Epsom	£12.2m	Town Centre
4	Sainsbury's Local, The Broadway, Stoneleigh	£9.8m	District Centre
5	M&S, Ashley Centre, Epsom	£6.4m	Town Centre
6	Co-Op, Green Lanes, Chessington Road	£5.6m	Local Centre
7	Co-Op, The Broadway, Stoneleigh	£5.6m	District Centre
8	Tesco Express, Horton	£5.1m	Out-of-centre
9	Co-Op, Ruxley Lane, West Ewell	£5.0m	Out-of-Centre
10	Tesco Express, Epsom Station	£4.8m	Town Centre
11	Sainsbury's Local, Ewell Village	£3.3m	District Centre
12	Co-Op, Kingston Road	£3.2m	Local Centre
13	Tesco Express, Ruxley Lane	£3.1m	Local Centre
14	Tesco [Esso] Express, Reigate Road	£3.0m	Out-of-Centre
15	Co-Op, Upper High Street, Epsom	£2.4m	Town Centre
16	Co-Op, High Street, Ewell Village	£1.9m	District Centre
17	Co-Op, Station Approach, Epsom	£1.6m	Town Centre

8.17 Table 10.1 highlights the Sainsbury's at Kiln Lane to be the most popular foodstore, with a turnover of £81.3m. This if followed by the relatively new Aldi foodstore (Opened 2017), Waitrose in the Ashley Shopping Centre, Sainsbury's Local in Stoneleigh, and M&S in the Ashley Shopping Centre. The Aldi foodstore is located on the A24 bypass with good passing trade and connectivity across the borough; it has had a substantial influence on shopping patterns since opening in 2017. The out-of-centre Sainsbury's continues to be the most dominant foodstore in the Borough – consistent with the findings of both the 2009 Retail Study and 2015 Retail Study Update.

8.18 Within the Survey Area (Zone 1-12), the borough network of foodstores combined (listed in Table 5b, Appendix 2) have a 17.2% market share. This low trade retention is not a cause for concern given the extent of the survey area boundary and localised nature of convenience goods shopping. It is therefore relevant to focus on local trade retention levels within Zone 1 and 2, the zones most closely related to Epsom and Ewell's borough boundary.

8.19 For main food shopping, residents of Zone 1 are predominantly using Sainsburys Kiln Lane (49%), Aldi Kingston Road (10.8%), Asda Burgh Heath (10.1%), Waitrose Epsom (4.9%) and Waitrose Banstead (4.2%). For top up food shopping, the choice of foodstore – as you would expect – is considerably more varied. Residents of Zone 1 are predominantly using Waitrose Epsom (11.5%), Sainsburys Kiln Lane (9.7%), Co-Op Ewell Village (9.7%), Co-Op Ruxley Lane (9.7%), Tesco Express Esso Garage (5.8%), Tesco Express Horton (6.2%), Sainsbury's Ewell Village (3.8%), Tesco Express Ruxley Lane (3.5%) and M&S Epsom (3.5%).

8.20 Within Zone 1, the main foodstores in the Borough have a 67% market share, drawing £92.2m of a total £137.7m available. The remaining Zone 1 trade (33%) is accounted for by 'other' stores outside of Epsom & Ewell borough including the Asda Burgh Heath, Waitrose Banstead, Lidl Leatherhead, Tesco Extra New Malden and Tesco Leatherhead – amongst others (see Table 5, Appendix 2). It should be noted, however, that no foodstore outside of the borough has a substantially strong – and therefore competitive – market share. It would not seem necessary to aspire to 'claw back' any level of lost trade to floorspace outside of the borough, with most patterns reflecting geography rather than 'leakage'.

8.21 For main food shopping, residents of Zone 2 are predominantly using Sainsbury's North Cheam (28.3%), Sainsbury's Epsom (15.3%), Aldi Kingston Road (9.5%), Waitrose Worcester Park (6.6%), Sainsbury's Worcester Park (7.2%), Tesco Extra Sutton (7.0%), Waitrose Banstead (4.7%), Sainsbury's Local Stoneleigh (4.2%), and Co-Op Stoneleigh (4%). For top up food shopping, residents are predominantly using Sainsbury's Local Stoneleigh (12%), Waitrose Cheam (11%), Co-Op Stoneleigh (10.5%), Sainsbury's Superstore North Cheam (6.9%), and Sainsbury's Local Worcester Park.

8.22 Zone 2 has a larger geographical area lying outside of the Borough. The main foodstores in the borough consequently have a lower market share (35%) than Zone 1 (67%). The remaining Zone 2 trade (65%) is accounted for by 'other' stores outside of Epsom & Ewell borough including Sainsbury's North Cheam, Waitrose Worcester Park, Sainsbury's Local Worcester Park and Tesco Extra Sutton. Again, these lie within or adjacent to Zone 2 and reflect geography rather than borough 'leakage'.

Epsom Town Centre: Convenience Goods Floorspace Performance

8.23 Our methodology estimates the trade draw and performance of foodstore destinations across the borough. Key foodstores in Epsom Town Centre include Waitrose and M&S Food in the Ashley Shopping Centre, and smaller format stores including Co-Op on Upper High Street, Co-Op on Station Approach and Tesco Express Epsom train station.

8.24 We estimate that the Waitrose, Ashley Shopping Centre has a convenience goods turnover of £12.9m. Based on a convenience goods floorspace of 1,186 sq m net we estimate that the Waitrose store has an average convenience goods sales density of £10,860 per sq m net. This is lower than company average sales (£13,431 per sq m net), but stronger than that identified in the 2009 Retail Study (£8,527 per sq m net). Given the town centre location, the recorded figure is likely to be buoyed by top up passing trade and local employee spending from those living further afield. The store is likely to be performing broadly in line with company expectations, but the analysis is not reflecting an 'over-performing' foodstore. This is in line with our site visits and observations.

8.25 We estimate that the M&S Simply Food in the Ashley Shopping Centre has a convenience goods turnover of £6.7m. Based on a convenience goods floorspace of 897 sq m net, the store has an average convenience goods sales density of £7,490 per sq m net. This is lower than the company average sales density of £10,965 per sq m, but – like Waitrose – is higher than that recorded in the 2009 Retail Study (£6,489 per sq m net). Our observations on a number of site visits recorded the store consistently busy with high footfall and check-out queues. M&S town centre stores across the country benefit from linked trips with adjoining shops and lunchtime trade from local employees – spend that would not necessarily be picked up in a household telephone survey. We conclude that the store is performing well, and likely to have a turnover greater than that recorded.

8.26 The smaller format top-up stores in Epsom Town Centre are performing particularly well. The Tesco Express at Epsom train station has a sales density of c.£18,820 per sq m net, considerably higher than company averages (£12,911 per sq m net). The Co-Op on Upper High Street has a sales density of £14,290 per sq m net, whilst the Co-Op on Station Approach has a sales density of £11,570 per sq m net – both higher than the company average sales density of £8,269 per sq m net.

8.27 Overall, the data suggests that two main foodstores are performing slightly below company average levels, but on-site surveys, observations and the likely benefits of additional linked trip and employee trade indicate that both stores are performing well. The top-up smaller format foodstores are performing particularly well, being located close to the main transport interchange and large residential catchment areas.

Stoneleigh Broadway District Centre: Convenience Goods Floorspace Performance

8.28 Stoneleigh Broadway has two small format anchor foodstores – Co-Op and Sainsbury's, located on opposite sides of the high street, but both occupying prime pitches. The figures are suggesting a particularly strong performance of both stores, driven by good footfall and small format, efficient floorplates. Based on a net sales convenience goods floorspace of 238 sq m net we estimate that the Sainsbury's Local has an average sales density in excess of £40,000 per sq m. This is substantially above the Sainsbury's company average sales density of £12,191 per sq m, and likely helped by free on-street parking, limited competition and lengthy opening hours in close proximity to Stoneleigh train station.

8.29 The Co-Op store is a similar size. Based on a net sales convenience goods floorspace of 262 sq m we estimate that the Co-Op has an average sales density of around £21,000 sq m net. This is substantially above the Co-Op company average sales density of £8,269 per sq m; clearly playing a secondary role to the Sainsbury's Local, but still recording a strong performance. The analysis demonstrates the important role of both Sainsbury's and Co-Op to the wider town centre vitality and viability; with both stores being key anchors and identified footfall drivers.

Ewell Village District Centre: Convenience Goods Floorspace Performance

8.30 Like Stoneleigh Broadway, Ewell Village has two small format anchor foodstores – Co-Op and Sainsbury's, located on opposite sides of the high street, but both occupying prime pitches. Co-Op has a small amount of on-street parking outside, and Sainsbury's benefits from two adjoining pay and display car parks. The performance of the foodstores is strong albeit to a lower level than Stoneleigh Broadway. Based on a net convenience goods sales floorspace of 238 sq m net we estimate that the Sainsbury's Local has an average sales density of around £14,000 per sq m net. This is more in line with the Sainsbury's company average sales density of £12,191 per sq m net.

8.31 Based on a net convenience goods sales floorspace of 223 sq m we estimate that the Co-Op has an average sales density of around £8,700 per sq m net. This is in line with the Co-Op company average sales density of £8,269 per sq m net, again playing a secondary role to the Sainsbury's Local, but not to the same extent as that identified in Stoneleigh Broadway. The two foodstores in Ewell Village are both commercially viable and performing in line with company expectations, helping to underpin the vitality and viability of Ewell Village as key anchor stores.

Other Key Town Centre Foodstores: Convenience Goods Floorspace Performance

8.32 The Aldi foodstore located in Kingston Road Local Centre is newly opened since the 2009 Retail Study and 2015 Retail Study Update. As noted earlier, the store has had a significant influence on shopping patterns across the Borough and is a well-used food shopping destination. The store draws trade from ten of the twelve survey zones albeit only small percentages in most zones. The strongest market shares are identified in Zone 1 (6.8%), Zone 2 (7.8%) and Zone 12 (5.7%) – those zones on the A24 by-pass.

8.33 We estimate that the store currently has a convenience goods turnover of £37.6m, the second highest turnover in the Borough. Based on this turnover, and with a net sales floorspace of 840 sq m, we estimate the sales density to be in excess of £44,500 per sq m net – the strongest performance identified in the Borough. Site visits observed the car park to be full and cars queueing on the A24 to enter.

Epsom & Ewell Out of Centre: Convenience Goods Floorspace Performance

8.34 The out-of-centre Sainsbury's foodstores is located on Kiln Lane, just off the A24 by-pass and equidistant between Epsom Town Centre and Ewell Village District Centre. The food superstore adjoins Wickes and Halfords and a wider area of industrial uses. The store achieves its highest market share in Zone 1 (35.3%), followed by Zone 2 (10.6%), Zone 4 (10.4%), and Zone 10 (6.3%). The food superstore draws trade from every zone except Zone 3 (Sutton catchment).

8.35 We estimate that the store currently has a convenience goods turnover of £83m, higher than the level recorded in the 2009 Retail Study (£62.8m), and almost three times the turnover of Epsom Town Centre's combined convenience provision. Based on this turnover, and with a net convenience goods sales area of 3,575 sq m net, we estimate the sales density to be c.£23,200, substantially higher than Sainsbury's company average of £12,191 per sq m net. The store is trading strongly, and consistent with the 2009 Retail Study, it is clearly the dominant foodstore in the Borough. Given recent investment, location and the strong range of product offer, this is likely to remain the case over the forthcoming local plan period.

Convenience Goods: Quantitative Need

8.36 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace, the analysis identifies a level of residual expenditure sufficient to support additional convenience goods floorspace across the borough. We have assumed an increase in sales efficiency rates for existing floorspace of 0.7% between 2019-2020, 0.4% between 2020-2021, 0.2% between 2021-2025, and 0% thereafter.

8.37 The analysis is based on existing floorspace and committed development i.e. those planning applications that have been granted planning permission but not yet constructed/open for trading. When open, these schemes will claim a proportion of residual expenditure and must therefore be taken into consideration when forecasting over the longer term. The one scheme identified is a new Lidl foodstore on Upper High Street in Epsom Town Centre, which will have a net convenience goods floorspace of 1,142 sq m, and a turnover of £8.2m based on a sale density of £7,098 per sq m net.

8.38 The projections are summarised in Table 7, Appendix 2, which indicates that by 2022 there will be an identified residual expenditure of £84.1m, set to grow to £94.1m by 2027 and again to £103.4m by 2032. Based on an average sales density of £12,000 per sq m net (grown according to recommended sales efficiency rates set out above), we forecast need for 6,920 sq m net by 2022, growing to 7,662 sq m net by 2027, and again to 8,420 sq m net by 2032. It should be noted that projections beyond 2027 should be treated with caution given growing margins of error over longer time periods, and an ongoing uncertain economy.

Comparison Goods: Epsom Town Centre Floorspace Performance

8.39 The comparison goods floorspace performance of Epsom Town Centre has improved considerably over the last 10 years. Table 4, Appendix 3 sets out Epsom Town Centre's market share across the survey area, highlighting variations in influence (on shopping patterns). It is evident that the area of influence is broadly similar to that identified in the 2009 Retail Study, extending across every survey zone but with a more limited market share in Zones 3, 11 and 12. Shoppers living in those northern zones instead continue to look towards Sutton, Kingston and retail warehousing in Purley Way and New Malden for their comparison goods shopping needs.

8.40 Within the survey area, Epsom Town Centre draws 10.5% of total available comparison goods expenditure (£216.9m). This is a strong increase since 2009 when a survey area market share of 6.6% was recorded, equating to a trade draw of £92.5m. Table 8.2 below sets out the market share of Epsom town centre within each survey zone, comparing the 2009 Retail Study outputs with the most recent evidence collated. The survey supporting the 2009 Retail Study was undertaken in November 2008, and the data therefore provides a comparison over an 11-year period.

Table 8.2: Foodstore Market Share Trend Data

Zone	2008 Market Share	2019 Market Share
Zone 1	26.9	37.3
Zone 2	4.9	14.1
Zone 3	0.0	1.0
Zone 4	9.9	13.9
Zone 5	2.0	5.6
Zone 6	2.9	7.1
Zone 7	18.3	27.7
Zone 8	20.0	21.4
Zone 9	5.2	4.9
Zone 10	3.6	4.6
Zone 11	0.0	2.0
Zone 12	0.1	1.1

2008 & 2019 Data sourced from NEMS Household Telephone Survey

8.41 It is evident from Table 10.2 that the market share of Epsom Town Centre has improved in every survey zone aside from Zone 9 which is located some distance from Epsom to the south west. Epsom Town Centre is located in Zone 1 within which market share has increased considerably from 26.9% to 37.3%, a key positive indicator reflecting an improved customer loyalty in this central catchment area. Epsom Town Centre has also experienced a significant increase in shopper loyalty in Zone 2, Zone 4, Zone 5, Zone 6 and Zone 7.

8.42 Remaining residents in Zone 1 are instead choosing Kingston (20.4%), Sainsbury's Kiln Lane (8.5%), New Malden retail warehousing (7.4%), and Purley Way retail warehousing (4.9%) for their comparison goods shopping.

8.43 Within the whole survey area, Epsom Town Centre draws 10.5% of total available comparison goods expenditure (£216.9m). On the basis of current market shares, we estimate the town centre has a comparison goods sales density of approximately £8,077 per sq m net, which is substantially stronger than that recorded in 2009 (£3,948 per sq m net). This is a key indicator reflecting the consolidation of Epsom Town Centre and the strong improvement in performance over the last 11 years. The evidence is demonstrating that more people in the core catchment are choosing Epsom over competing centres such as Kingston, Sutton, Guildford and Croydon, for example.

8.44 The 2015 Retail Study Update identified a number of good quality retailers that had opened in Epsom Town Centre since the previous 2009 Retail Study:

- Cabello (A3)
- Guitar Guitar
- Stormfront (Apple/Computers)
- Bills Restaurant
- Hotter Shoes
- Pandora Jewellers
- Sports Direct
- Metro Bank
- Jones Bootmakers
- Pure Gym
- Costa Coffee, Ashley Centre
- Costa Coffee, Odeon
- Costa Coffee, Epsom Station
- Muffin Break (A3)
- La Piccola (A3)
- Roosters Piri Piri (A3)
- Mountain Warehouse
- Nandos
- Smiggle Stationery
- Black Burgers

8.45 This improved representation assisted in the improved overall performance of Epsom Town Centre as a destination of choice since 2008/2009. Representation has improved again more recently with the introduction of White Stuff, Hotel Chocolat, Trespass Clothes, Prezzo…anymore? [add details]

Comparison Goods: Stoneleigh Broadway and Ewell Village Floorspace Performance

8.46 It is evident from the survey results and our qualitative analysis that both Stoneleigh Broadway and Ewell Village have a more limited comparison-goods shopping function which is consistent with their role as district centres and their position in the retail hierarchy beneath Epsom. Nevertheless, the analysis identifies that the comparison goods floorspace that is present is performing well.

8.47 Market share for both centres is limited, with Stoneleigh Broadway achieving a comparison goods market share in Zone 1 (0.22%) and Zone 2 (2.13); and Ewell Village achieving market share in Zone 1 (0.86%), Zone 2 (1.4%), Zone 3 (0.03%) and Zone 7 (0.32%). Within the whole survey area both centres draw 0.3% of total available comparison goods expenditure.

8.48 On the basis of current market shares and a turnover of £6m, we estimate that Stoneleigh Broadway district centre has a comparison goods sales density of approximately £3,480 per sq m net. This is a good performance for a centre of Stoneleigh Broadway's scale and retail offer. Ewell Village has a turnover of £6.2m and a similar sales density of £3,958 per sq m net – again a good performance for a centre of this scale.

Comparison Goods Need

8.49 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and applied annual growth in existing sales per sq m net of 2.1% (2019-2020), 2.5% (2020-2021), 2.8% (2021-2025) and 2.3%+ beyond 2025. For Epsom Town Centre we have assumed that new floorspace should achieve at least £8,000 per sq m net, retaining strong performance levels in the wider context of planned housing delivery. We forecast that sales density of new floorspace will grow consistent with that set out for existing floorspace.

8.50 This assessment has assumed that Epsom, Stoneleigh Broadway and Ewell will maintain existing market share and we have forecast the need for new comparison goods floorspace to the years 2022, 2027 and 2032. By virtue of growth in population and expenditure – and when taking into account the comparison goods element of the Lidl commitment on Upper High Street – we have projected residual expenditure to support new floorspace in Epsom Town Centre of £6.2m by 2022, £24.8m by 2027 and £54.8m by 2032.

8.51 This translates into surplus capacity to accommodate an additional 800 sq m net by 2022, 2,900 sq m net by 2027 and 5,700 sq m net by 2032. Given uncertainties in the economy and growing margins of error over time, we do not recommend identifying sites to meet the need beyond 2027, and the new Local Plan should 'plan' to accommodate around 2,900 sq m net of comparison goods floorspace.

9. Conclusions & Recommendations

9.1 Drawing on previous sections, including our qualitative and quantitative analysis, this section sets out the key conclusions arising from our analysis , considers the scope to accommodate new retail and leisure development in the borough, and identifies the opportunity for a pro-active development plan policy framework to facilitate sustained long-term strength in performance.

9.2 The NPPF advises Councils to plan positively to meet needs arising for town centre uses. Policies should support the vitality and viability of town centres, consider frontages and boundaries, and allocate a range of suitable sites to meet the scale and type of retail development needed. This section addresses these requirements and makes recommendations to provide the Council with up to date evidence to prepare suitable strategies for their network of town centres.

Conclusions

Policy

9.3 The NPPF advocates a 'town centres first' approach and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. The NPPF encourages LPA's to recognise that town centres are the heart of their communities and to pursue policies which protect their health and vitality and positively seek opportunities to meet the development needs of their area. The development plan should set out policies in respect of Primary Shopping Areas, and Primary and Secondary Shopping Frontages where required.

9.4 The Development Plan confirms the Council's commitment to a positive and pro-active approach to town centre development and change, seeking to improve retail attractions, and increase the range and types of shop and other high street facilities and services. Plan E emphasised that Epsom Town Centre does not require significant change or regeneration, but rather a focus on effectively managing what already exists and making the most of opportunity sites. The document set an A1 minimum threshold of 66% of units within the Primary Shopping Frontage, and 50% within the Town Centre Boundary.

9.5 Key development opportunity sites were identified in Plan E including Depot Road/Upper High Street, The Utilities site, and Epsom Station, one of which has now been implemented (Epsom Station) and one part implemented (Utilities site). When considering development proposals, the development plan does not fix a locally set retail impact floorspace threshold and, by default, refers decision makers to the national NPPF threshold of 2,500 sq m gross.

National Market Context

9.6 Today, the success of town centres is less reliant on traditional retail floorspace, instead becoming more focused on ensuring a multi-dimensional offer and the creation of a visitor experience of sufficient quality to compete with internet sales.

9.7 The town centre market has been challenging in recent years, as the UK comes to terms with and explores the means with which to leave the European Union. Associated economic uncertainty has led to a more reserved level of consumer spending, and this, alongside the growth in online spending, competition for click and collect, and a saturated casual dining experience, the high street has been hit hard.

9.8 For Epsom, the retention of retail floorspace and the consolidation of a diverse leisure and visitor economy will be key to strengthen its position in the sub-regional network of centres performing the role of a larger town centre.

Planning Reform

9.9 Recent consultation on proposed planning reform (2018) highlights the government's intention to move towards a more flexible policy approach to the high street, recognising modern business formats and emerging retail models within A1 shop units. The government response paper suggests, however, that they are unlikely to move towards a merged Use Class A category in order to retain a level of planning control to pro-actively shape high streets. It should be emphasised that whilst town centre markets are changing the long-term implications are yet to be fully realised.

9.10 The Government's suggested planning reform and 'call for ideas' has been consulted on, but no firm changes have been finalised or implemented. It is premature to recommend a far-reaching overhaul of town centre policy in Epsom & Ewell, but continued monitoring and future evidence base studies should keep this under review. The need for a sound policy framework, strong frontage policies, and a clear and robust statement of permitted uses in different locations will be required over the Local Plan period.

9.11 The market trend and visitor expectations for multi-dimensional town centres must be a consideration, but it should not over-ride the importance and retention of Use Class A1 across Epsom Town Centre which should remain a priority. It is this foundation that will enable the town centre to retain and grow its market share and level of attractiveness within the sub-regional hierarchy of town centres moving forwards.

Sub-Regional Context

9.12 Kingston and Sutton continue to draw greater levels of comparison goods trade from the Zone 1-12 Survey Area when compared to Epsom Town Centre, reflecting their scale and higher order shopping roles. The evidence demonstrates, however, that Epsom is the only town centre that has grown its market share over the last 11 years at the expense of all other shopping destinations. Epsom has consolidated its position and clawed back lost trade – a particularly strong performance and vitality indicator.

9.13 Moving forwards, Kingston, Croydon, Guildford and Sutton all had major retail/town centre expansion plans. In light of economic circumstances and the declining health of the retail sector in recent years, Croydon and Guildford have halted schemes for review with an emphasis on residential led schemes and a substantial scaling back of retail. Kingston continue to move forwards with the redevelopment of the Eden Shopping Centre, although the final mix of Use Class A is unknown but likely to reflect a 'scaled-down' A1 floorspace element. Sutton have identified town centre development sites, but none are likely to incorporate a substantial level of floorspace.

9.14 There is a clear opportunity for Epsom to retain – if not improve – market share still further over the next 10-15 years through a continued pro-active strategy of investment, partnership working and a robust policy framework. This is discussed further in the final section of this report.

Epsom Town Centre: Qualitative Overview

9.15 The evidence presented demonstrates good levels of vitality and viability across the Primary Shopping Area and highlights specific areas for policy intervention to ensure a continued sound performance moving forwards.

9.16 The level of convenience goods provision has remained stable over the last 11 years, and is only marginally below the national average in terms of operator numbers. The range and choice for the local catchment will be enhanced if the permitted Lidl foodstore scheme is implemented just outside the Primary Shopping Area boundary on Upper High Street. The impact of this store on town centre operators and wider town centre performance, should be monitored once open and trading.

9.17 Epsom has a strong mix of mid-range comparison goods retailers, albeit the number of operators in this category has substantially declined over the last 11 years. Despite this trend, Epsom has succeeded in retaining the major key attractors which are critical in underpinning Epsom as a town centre of choice; evidence highlights that the percentage of national multiples within this category has actually increased by 2% in the last 5 years. Policy should aim to halt or reverse the decline of comparison goods operators. It is recommended that town centre partners should target conversations with absent retailers, including higher end clothing operators, in order to understand their locational and unit requirements, and to 'sell' Epsom where possible.

9.18 The evidence demonstrates a good mix of shopping and leisure facilities, supporting an enhanced and multi-dimensional town centre. Cafes and restaurants are distributed throughout the town centre with concentrations on South Street and improved facilities in Epsom Square which has evolved and intentionally established itself as a 'leisure quarter'. The Playhouse Theatre remains a key attractor across the sub-region, the Odeon has invested in a 'Luxe' upgrade, and Picture House has received planning permission for a new six screen cinema in Epsom Square. These uses effectively reinforce the shopping role of Epsom, helping to create a wider visitor destination offering a range of retail and leisure uses for those across the wider sub-regional catchment area.

9.19 Financial and business services is the category most in excess of the national average. Predominantly falling within Use Class A2, it is clear that the Article 4 Direction controlling these uses remains relevant and important in today's market. Audits of both Stoneleigh Broadway and Ewell Village Centres have identified a growth in ground floor Use Class B1 and Use Class D2 across each town centre, and the Development Plan should be pro-active in preventing this trend from emerging within the Epsom Town Centre Primary Shopping Area.

9.20 The Use Class A1 threshold of 66% within the Primary Shopping Frontage has been retained, and this policy was broadly supported and endorsed by the Secretary of State when tested at appeal in 2018. The level is, however, in balance and very close to falling below the threshold in the near future. The high figure in the Ashley Centre skews the town centre Use Class A1 proportions, and if excluded the level is below the town centre threshold. Use Class A1 should be protected across the Primary Shopping Frontages, particularly on High Street Eastern End (northern side) which performs a strong retail/shopping role and link through to Upper High Street. The retention of operators reinforcing daytime trading hours throughout the Primary Shopping Frontage is evident and should be encouraged and protected in policy.

9.21 The analysis concludes that each 'vision/character area' remains vital and viable with distinct roles. Recent major investment has improved the cohesiveness and appearance of the western part of the town centre and also Epsom Square, with more projects planned by the BID team. A focus on safety and security will be important, responding to relatively high reported crime rates. The next phase of investment over the plan period should now focus on eastern part of the town centre including High Street (eastern end), the major Church Road junction and Upper High Street.

Epsom Town Centre: Quantitative Performance/Forecasts of Need

9.22 Epsom Town Centre has increased its Zone 1-12 market share from 6.6% in 2009 to 10.5% in 2019, equating to a growth in trade draw from £92.5m in 2009 to £216.9m in 2019. The sub-regional analysis demonstrated that all other centres – including Kingston and Sutton – had experienced a reduced market share over the same period and catchment area. This is a particularly strong vitality indicator for Epsom town centre.

9.23 The improved level of trade retention is reflected in the quantitative analysis of town centre floorspace performance by square metre. Epsom Town Centre is estimated to have a comparison goods sales density of c.£8,077 per sq m net, which is substantially stronger than that recorded in 2009 (£3,948 per sq m net). This adds weight to the need to retain Use Class A1 comparison goods floorspace in Epsom town centre, in order to retain these trade retention and trading levels.

9.24 When forecasting need, the assessment has assumed that Epsom will maintain existing market share, leading to a projected residual expenditure to support new floorspace in Epsom Town Centre of £6.2m by 2022, £24.8m by 2027 and £54.8m by 2032. This translates into surplus capacity to accommodate an additional 800 sq m net by 2022, 2,900 sq m net by 2027 and 5,700 sq m net by 2032.

9.25 Given uncertainties in the economy and growing margins of error over time, we do not recommend identifying sites to meet the need beyond 2027, and the new Local Plan should 'plan' to accommodate around 2,900 sq m net of comparison goods floorspace.

Borough-wide Convenience Goods Need

9.26 The quantitative analysis identifies a level of residual expenditure sufficient to support additional convenience goods floorspace across the borough. Taking into consideration the committed scheme for a new Lidl foodstore on Upper High Street in Epsom, the projections forecast need for 6,920 sq m net by 2022, growing to 7,662 sq m net by 2027, and again to 8,420 sq m net by 2032. It should be noted that projections beyond 2027 should be treated with caution given growing margins of error over longer time periods, and an ongoing uncertain economy.

9.27 The high levels of convenience goods need is driven predominantly by the out-of-centre Sainsbury's at Kiln Lane, the Aldi foodstore in Kingston Road Local Centre and small format foodstores in Stoneleigh Broadway and Ewell Village – all of which are trading strongly and above expected company averages. Our qualitative analysis of Sainsbury's at Kiln Lane identifies a strong performing store, but not one that is at full capacity. Site visits observed available car parking and short check-out queues. An over-trading store in quantitative terms does not necessarily lead to the need for additional foodstores when qualitative issues are taken into consideration. We conclude that the Sainsbury's store could absorb a proportion of identified need, and will retain

9.28 The Aldi store in Kingston Road was, however, observed to be at full capacity in qualitative terms, with regular queuing on the by-pass as cars wait for spaces to become free and longer queues at the payment check-outs. We conclude that this store would be unable to absorb any residual need identified.

9.29 The Borough-wide housing growth strategy will require the consideration of new and sustainable communities, needing to be served by local shopping and service facilities. The residual need identified for convenience goods floorspace should, in the first instance, be directed to these new residential growth areas which would comprise a mix of small to medium-sized foodstores and small unit shops creating parades and new or improved Local Centres.

Epsom Town Centre Strategy

9.30 Over the last 11 years Epsom has consolidated its town centre shopping role in the wider catchment, being the only town centre to grow its market share. It has improved its floorspace performance and substantially increased turnover. The greatest opportunity for Epsom Town Centre is to consolidate its position, market share and catchment area still further over the forthcoming Local Plan period. Kingston and Sutton are both Metropolitan Town Centres at a different (higher) level in the retail hierarchy and it is not possible for a town the size of Epsom to compete. Nevertheless, Epsom has strengthened its role becoming a centre of first choice for a growing proportion of the catchment population; the aim should be to build on this success moving forwards.

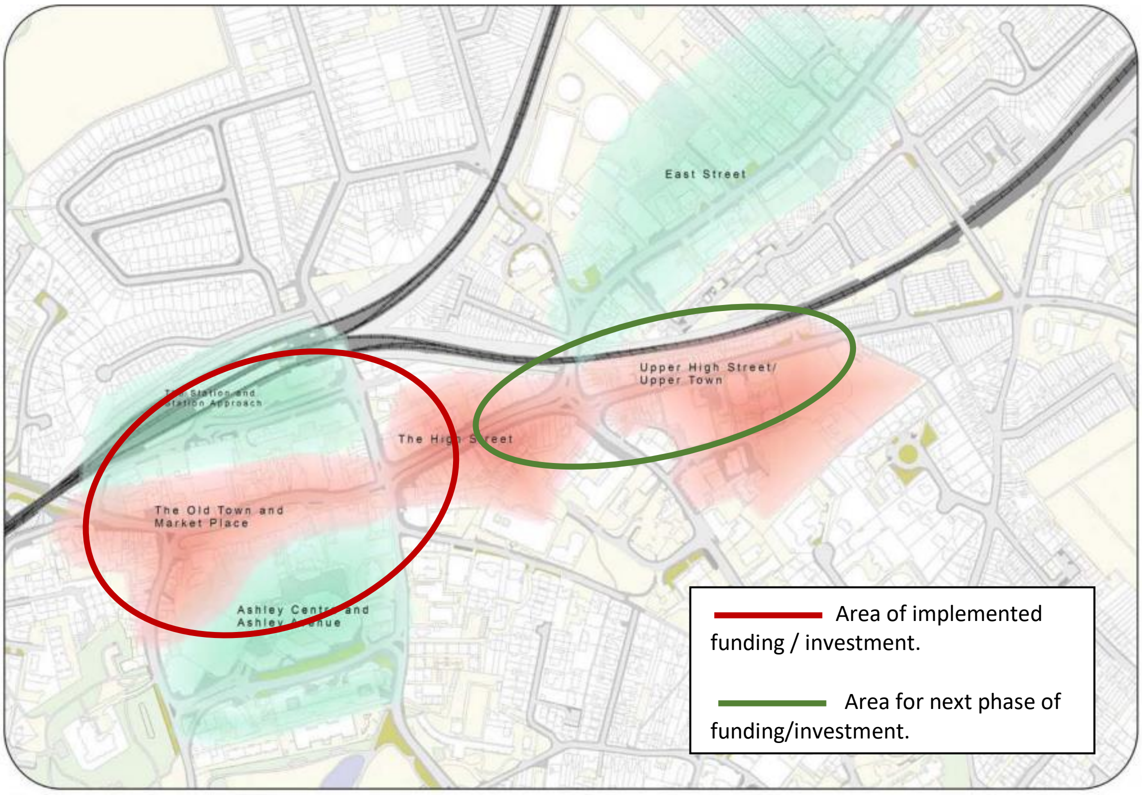
9.31 Consistent with conclusions drawn in Plan E, Epsom does not require significant physical growth, change or regeneration, but rather the focus should be on effectively managing what already exists. The conclusions from this piece of work highlight that this strategy has proved successful in recent years, following a strong focus on investment in the public realm, marketing, traffic congestion, environmental appearance and pedestrian movement and circulation. Facebook pages including 'What's on in Epsom', 'Go Epsom' and 'Epsom and Ewell Families' continuously raise the profile of retailers, businesses and events, strengthening the towns appeal and highlighting reasons to visit. The recent 'Nutcracker' trail around the town centre was particularly popular, for example. Combined with a large influx of quality key attractors in the period 2009 to 2015, and a smaller number of multiple and independent operators more recently, the overall impact has been positive. The focus should now be on obtaining the next phase of investment funding, implementing the next phase of town centre enhancements, and supporting complementary BID projects.

9.32 The upkeep and enhancement of Epsom Town Centre should be a continuous pro-active journey over the Local Plan period and beyond, assisting in the centre's attractiveness to visitors, and driving footfall across the entire Primary Shopping Area. In recent years the focus has been on Epsom Station, South Street and the Old Town/Market Place. Moving forwards, the focus should now switch to the High

Street, Church Street/East Street junction and Upper High Street as indicated on the plan below. Investment in paving, shop frontages, pedestrian crossings/circulation and street furniture, for example, should take place alongside wide town centre initiatives relating to car parking, events, marketing, crime reduction and business support.

9.33 A pro-active Local Plan policy framework promoting investment and the physical enhancement of the Primary Shopping Frontage in the eastern part of the town centre – as illustrated below – will add weight to frontage policies when making the case against any proposed change of use away from A1. The absence of investment will inevitably lead to the overall decline of this part of the town centre, with knock-on consequences for retailer representation, footfall, and the quality/diversity of operator.

Epsom Town Centre: Recommended Next Phase of Town Centre Funding/Investment



9.34 The greatest threat to Epsom Town Centre is a fall in the number and quality of A1 comparison goods operators. Whilst the evidence demonstrates the success of Epsom in retaining the larger key attractors, the overall trend has been one of decline, with the Primary Shopping Frontage only just retaining the 66% Use Class A1 threshold. Some individual frontages are substantially below this already, and if the Ashley Centre – as a separately managed entity – is excluded, the proportion elsewhere falls to 58% If continued town centre consolidation and improved performance with the Kingston/Sutton catchment is to be achieved, policy will need to protect the mix and range of Use Class A1, focusing on unit number, rather than floorspace or length of frontage, to ensure diversity and mix in representation.

9.35 Recent government consultations suggest planning reform to introduce more flexibility with the Use Class A category. It should be emphasised, however, that this is only at consultation stage, and the true impact of national market trends and changes to the high street are yet to be fully understood. Epsom has been found to be a strong performing town centre, and the starting point of any town centre strategy should be the importance of a critical mass of key attractors and Use Class A1, including fashion and footwear operators. In larger town centres like Epsom, these remain important in driving visitor and footfall numbers in the first instance – particularly when in such close proximity to larger centres such as Kingston and Sutton.

9.36 The 2009 Retail Study drew a similar conclusion, stating that as well as the larger competing town centres, the greatest threat to Epsom is also the decline of its own retail offer and the consequent influx of fast food take-aways and charity shops, for example. Local Plan policy since that time has been largely successful in restricting the introduction of further A5 take-away uses, whilst the Article 4 Direction has prevented permitted change of use of A1 to A2.

9.37 Planning policy should re-emphasise this stance, whilst also highlighting the detrimental impact of Use Class B1 (office) and D2 (leisure) to the vitality and viability of active shopping frontages. Three fitness centres have opened on Upper High Street, effectively removing an active shop frontage. Whilst a mix of uses is encouraged and over-dominance of this type of use will have a negative impact on the health of a high street. The Local Plan policies should include wording to this effect, and highlight the more appropriate upper floors in order to maximise town centre capacity to accommodate a broad mix of uses whilst supporting active shop frontages at ground floor.

9.38 Whilst preventing any further loss of A1 comparison goods operators, town centre partners should continue to establish connections with a range of higher end retailers with the aim of growing and consolidating this sector. Operators might include, for example, White Company, Cath Kidston, East, Jigsaw, Hobbs, Space NK, Warehouse, Mint Velvet and French Connection – retailers that often favour smaller and more historic shop units like that found in Epsom around the Market Place and on High Street. Any town centre strategy should be informed by the locational and space requirements of such retailers to understand the level of leverage needed to promote and assist in their representation. Town centre partners should target conversations with these operators, promoting this aspiration.

9.39 As set out in Section 2, paragraph 85 of the NPPF aims to ensure the vitality of town centres, advising local authorities to promote the long-term vitality and viability of the network of town centres by allowing them to grow and diversify, allowing a suitable mix of uses (including housing) and promoting their distinctive characters. The NPPF adds that planning policies should define the extent of 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. It is also advised/necessary to allocate a range of suitable sites in town centres to meet the scale and type of retail floorspace needed.

9.40 The town centre 'vision' (character) areas identified in Plan E remain relevant in today's context and should form a key part of the town centre strategy for Epsom. Multi-dimensional town centres will be ever more important moving forwards into the future, and a balance of uses should be maintained. The evidence presented in earlier sections conclude a strong and balanced mix of both retail and leisure operators currently represented in Epsom; there is no evident over-dominance of any one category, albeit the proportion of Financial/Business/Property (Use Class A2) is above the national average and any further proliferation should be avoided. With reference to Plan E (2011) we make the following observations:

- Plan E identifies the Old Town/Market Place as the focus for an exciting mix of street-based activities, including pavement cafes, street entertainment and a permanent market. This vision has seen progress recently with investment and enhancement in these key areas, with more to follow as the regeneration phases are completed and the BID projects are rolled out. The momentum should be retained over the Local Plan period.

- The vision for South Street and West Street was high quality independent shops and restaurants. Pavement and road investment have improved the quality of the environment, and this area should greatly benefit from links with the Playhouse Theatre and linked evening economy trips (eating/drinking). Evening economy A3/A4 uses should be directed here in the first instance, alongside Epsom Square. Such secondary areas are vulnerable to the infiltration of non-retail uses including B1 office, D2 leisure/fitness gyms and also Use Class A2 financial and business uses.

These uses should be prevented in this key stretch of high street, and the Plan E vision should be rolled forward into the new Plan Period.

- The vision for High Street (eastern end) was for it to be reborn as a traditional-style high street shopping environment, reflecting its 1930's history. Plan E made reference to a pleasant and busy retail environment, a mix of retail uses and strong pedestrian link to Upper High Street. The evidence and analysis in this study highlights the continued strength of Use Class A1, but also the vulnerability to its continued decline. Planning policy should continue to protect the 66% Use Class A1 threshold alongside a business plan of environmental, pedestrian and shop front improvements.

  The continued presence of A1 operators is key to ensuring the continued viability of High Street (eastern end) as Primary Shopping Frontage over the development plan period. Plan E recognised that this part of the High Street has experienced physical decline, but this has not been addressed given the investment focus elsewhere in the town centre. The policy framework for this vision area should be more specific and detailed in terms of the type of uses permitted, with an additional restriction preventing Use Class A3 in rows of adjoining units. The importance of retaining a 66% threshold should be emphasised with sound and robust reasons provided. Policy should prevent against any further loss of Use Class A1 irrespective of agency/marketing period. The High Street is performing well, and recent trends demonstrate that new operators will be attracted to this character area.

  The Article 4 direction preventing Use Class A2 should be retained. This stretch should ensure active shop fronts and daytime activity, with businesses continuing to contribute to the vitality and viability of the shopping area. Operators with daytime closing hours should not be allowed to trade in this frontage.

- The intention for Epsom Square was a bustling piazza providing opportunities for people to meet, eat and drink safely throughout the day and into the evening. The square has experienced substantial investment, but there is further opportunity to promote and develop the area into a bustling gathering point. The implementation of the permitted Picture House cinema is a key opportunity to initiate further positive change. Epsom Square should be the focus of the daytime and evening leisure economy in terms of eating and drinking.

- The vision for Upper High Street was an attractive and vibrant part of the town centre offering leisure and shopping activities including high quality and niche retailers, family friendly restaurants and other leisure activities. The historic built environment was recognised for enhancement and protection. Upper High Street does perform a strong local high street with a good mix of uses, which should continue to be encouraged. Like South Street this secondary area will continue to be vulnerable to the infiltration of non-retail uses including B1 office, D2 fitness gyms and also Use Class A2 financial and business uses. These ground floor uses should be strongly resisted in this key stretch of high street, including further fitness centres/gyms (Use Class D2).

9.41 The Primary and Secondary Shopping frontages as defined in the Development Plan remain fit for purpose over the forthcoming Local Plan period. Planning policy should retain the 66% Use Class A1 minimum threshold for the reasons set out above. The 66% threshold remains sound and robust, being consistent with national averages for A1 floorspace. The Inspector in the KFC decision did make a number of observations to support her conclusions in support of the proposal, but the over-riding comment was one of consistency with the Primary Shopping Frontage percentage threshold policy. As noted previously, this policy should be reinforced alongside a pro-active investment strategy for the eastern part of the town centre to assist in resisting change of use. Proposals would be considered against the frontage policy but also a robust and detailed town centre strategy for each individual vision area.

9.42 Within Secondary Retail Frontages, Use Classes A1/A2 and A3 should continue to be permitted, but the policy should be extended to strongly resist not only Use Class A5, but also Use Class B1 (office) and Use Class D2 (ground floor leisure fitness studios). The Article 4 Direction removing permitted development from Use Class A1 to Use Class A2 should remain in place over the full Local Plan period. Epsom Square currently falls outside the Primary and Secondary Shopping Frontages, but we recommend policy protects this area for Use Class A3 and A4, pro-actively preventing any change of use to Use Class A2, A5, and B1. In Epsom Square, leisure uses within the D2 category would seem appropriate but should be considered on their own merits and avoid blank/in-active street frontages, being better suited to upper floors.

9.43 The forecast need conclusions do not require any further sites for convenience goods to be identified in the town centre; and the overall strategy for Epsom is not one of growth but of consolidation. In this context, and following a phase of substantial investment in Epsom Town Centre, the following development opportunity sites – first identified in Plan E – remain available:

- Depot Road / Upper High Street: Part of the site fronting Upper High Street has planning permission for a mixed-use residential/foodstore scheme. The Council should consider retaining the remainder of the site as a potential development opportunity, whilst ensuring sufficient supply of car parking to anchor this eastern end of the town centre;
- The Utilities Site: Part implemented for housing, but the remainder of the site should be considered for redevelopment. This would likely encompass residential, but could accommodate retail/leisure uses provided they do not compete with the Primary Shopping Area;
- TK Maxx store, Upper High Street: This is a prominent site located within the heart of the Town Centre's Primary Shopping Area on the western end of the High Street. TK Maxx is a key attractor and key anchor in the town centre, and the upper floor comprises a leisure gym use which should also be retained. Nevertheless, there is opportunity for intensification and additional town centre residential, provided the retention of key retail/leisure operators can be safeguarded. This site also benefits from a pedestrian access route directly through to Epsom train station.

9.44 Finally, it is recommended that the Council review its defined frontages at regular intervals throughout its new Local Plan period. This is because:

- As this study has identified, the role and function of town centres has changed significantly in recent years, as a result of changes on consumers' shopping behaviour and wider market trends. It will be important for the town centre to be responsive to any future changes in behaviour and trends.
- There are three opportunity sites in the town centre, at least one of which we would expect to contain a quantum of retail floorspace if it comes forward for redevelopment. Depending on the nature and amount of floorspace which comes forward, this new development may result in the 'centre of gravity' of the town centre altering, which may in turn require reconsideration of the frontages set out above.

Recommendations: Epsom Town Centre

EP1: Retain the Primary Shopping Area as existing.

EP2: Amend the Primary Shopping Frontage as follows:

- Allocate the Ashley Centre as ***Primary Shopping Frontage Zone A***, with a 90% Use Class A1 (lower) threshold;
- Allocate the remainder of the Primary Shopping Frontage as ***Primary Shopping Frontage Zone B***, with a 66% Use Class A (lower) threshold. The Ashley Centre is the location for the predominant number of comparison goods multiple operators, most of which are in the Use Class A1 category. Separating it from the rest of the Primary Shopping Frontage

will avoid the Ashley Centre skewing Use Class composition analysis across the remainder of the town centre, enabling the policy framework to protect the lower threshold of 66% and prevent change of use from A1.

EP3: Policy priority to prevent fall in number of Use Class A1 comparison goods retailers. Policy should retain minimum thresholds for Use Class A1 in Primary Shopping Frontages, irrespective of unit size. Clarify the percentage relates to number of units to retain and ensure a strong mix and diversity of retail operator irrespective of floorspace and length of frontage.

EP4: Only Use Class A1 and Use Class A3 should be allowed within the Primary Shopping Frontage. Amend policy wording.

EP5: In Primary Shopping Frontages it is recommended that non-Use Class A1 operators are not allowed to locate in adjacent units, and that at least three Use Class A1 shops separate those individual non-Use Class A1 units that are allowed under the threshold policy.

EP6: Development Plan policy should prevent change of use to Use Class A5, Use Class B1 and Use Class D2 within Secondary Shopping Frontages.

EP7: The Article 4 Direction removing permitted development from Use Class A1 to Use Class A2 should remain in place and be extended to Upper High Street and South Street to avoid any dilution of the vitality and viability of these key frontages.

EP8: Ensure Epsom Square has a robust policy framework identifying appropriate permitted uses and central location as an eating/drinking/entertainment hub – including Use Class A3 and A4. Prevent against ground floor Use Class B1, Use Class A2/A5 and manage Use Class D2 to avoid closed/in-active frontages.

EP9: Clearly set out a policy framework and strategy for each of the key vision areas, setting out the uses permitted in each location. Avoid general town centre aspirations to, for example, improve the daytime and night-time economy; and ensure each vision area has a specific framework. Epsom Square and South Street should, for example, be identified as the evening economy leisure quarters, the only locations in the town centre suitable for those leisure operators that do not open for the full daytime trading hours.

EP10: Encourage town centre living and non-retail uses on vacant or redundant upper floors to encourage footfall and a vibrant daytime, evening and night-economy. This generally also leads to external refurbishment which is much needed in many parts of the town centre.

EP11: Encourage the retention of town centre foodstore operators and monitor the implementation of a new foodstore on Upper High Street if implemented. Assess the impact in terms of performance as a key anchor and footfall driver, or trade diversion from the Primary Shopping Area. Future evidence base to consider any amendment to the Primary Shopping Area boundary as a consequence.

EP12: Reinforce policy to retain Use Class A1 through discussions with absent retailers. Build a network in the category, including those higher end clothing and footwear operators, to understand their unit and locational requirements. Develop a pro-active framework and network to leverage them into the town centre where possible.

EP13: Finalise existing investment projects, and move towards securing the next phase of funding to focus on the eastern part of the town centre, including High Street (eastern end), Church Road/East Street junction and Upper High Street. Focus on general environment, shop frontages, and pedestrian environment and circulation/linkages with Upper High Street.

EP14: Continue to support the BID and BID projects across Epsom Town Centre. Explore funding partnerships to focus on key issues including entertainment/events, crime prevention and marketing.

EP15: Establish a wider relationship between Epsom Playhouse Theatre and the town centre evening and eating/drinking economy, to promote linked trips and wider economic benefits for the town centre. Discounted car parking to encourage dwell times, distribution of discount restaurant vouchers when booking theatre tickets, or website links to encourage restaurant bookings, for example. A possible BID project.

EP16: Retain Depot Road/Upper High Street, the utilities site and TK Maxx site as potential development opportunity sites suitable for a mix of uses including retail/leisure. Retain TK Maxx and the health club/gym with redevelopment for that site being intensification only. Ensure a sufficient supply of suitable sites to meet the need arising for c.2,900 sq m net of comparison goods floorspace in Epsom town centre, directed to the Primary Shopping Area in the first instance.

EP17: Encourage cycling through a re-evaluation of cycle parking and cycle lanes through the town centre and wider borough.

EP18: Enforce a retail impact threshold within the Development Plan, ensuring that edge and out-of-centre retail development proposals are required to undertake a full and detailed retail impact assessment for schemes at or above 500 sq m gross.

EP19: Continue to monitor the Government's planning reform proposals and outcomes for town centres.

EP20: Continue to monitor competing centre development proposals and aspirations to improve their town centre offer.

Stoneleigh Broadway: Current Performance

9.45 Stoneleigh Broadway is a wide and pedestrian friendly high street, comprising 62 shop units and benefitting from a plentiful supply of free car parking. The range of shop business is strong offering pharmacies, pet shop, two small convenience stores, a good selection of independent convenience stores, Post Office, dry cleaners, hair and beauty, shoe repair, cafes, restaurants, doctors, dentist and taxi office, for example. Community facilities include the library, dance studio and art studio, and the vacancy rate is particularly low.

9.46 The composition and mix of retailing in the Use Class A category (in % terms) has changed very little over the last 8 years, even – in the face of national trends – experiencing a small increase in Use Class A1 and a decrease in Use Class A2. The key change has been the overall decline in the number of businesses in the Use Class A1-A5 categories, with non-A Class businesses now totalling 17 compared to just 5 in 2011.

9.47 Many of these businesses provide active street frontages and generate town centre shopper footfall including the art club, dance studio, doctors, dentist, and library, for example; but the area of concern is the strong rise in Use Class B1 office space at ground floor. These introduce 'dead' frontages and any further growth will dilute retail frontages in what is currently a strong and healthy town centre.

9.48 The quantitative analysis has identified that Stoneleigh has a good comparison goods floorspace performance, trading at c.£3,480 per sq m net. This is concluded to be good for a centre the size of Stoneleigh, which performs the role of a District Centre.

9.49 The performance of convenience goods floorspace is particularly strong, perhaps reflecting local loyalty to the centre, a large 'walk-in' catchment population, free on-street parking and distance from the main out-of-centre foodstore (Sainsbury's Kiln Lane). Both the Co-Op and Sainsbury's stores trade substantially above expected company average levels, a trend often emerging from small format foodstore operators trading from small floorplates.

9.50 In the context of wider recommendations, Stoneleigh District Centre is not required to accommodate substantial additional comparison or convenience goods need. It is not required in policy to grow in scale, but the district centre must aim to consolidate and enhance its performance. Small scale infill sites well linked to the high street frontage might be appropriate for new retail floorspace and each proposal should be considered on its own merits.

Recommendations: Stoneleigh Broadway District Centre

ST1: Retain Primary Shopping Area Boundary, including Station Approach to the west of the railway line/train station.

ST2: Retain Article 4 Direction removing permitted development for change of use from Use Class A1 to Use Class A2, and extend it to cover the entire Primary Shopping Area, but excluding Station Approach to the west of the railway line. Many Use Class A2 Financial & Professional services have the appearance of offices, creating dead high street frontages and detracting from the vitality and mix of uses on the retail high street.

ST3: Policy should prevent any further change of use to Use Class B1 (offices), Use Class D1 (clinics/nurseries/education/training centres) and Use Class D2 (fitness gyms). Like Use Class A2 these uses create closed inactive high street frontages and detract from the vitality and mix of uses on the retail high street.

ST4: Local Plan policies should seek to retain the current level of Use Class A across the town centre. The town centre is performing well, but peripheral areas are becoming characterised by non-retail uses indicating the start of town centre decline if this trend is not stopped.

ST5: Support town centre Community Library where possible.

ST6: Retain free short stay on-street, car parking. Encourage environmental improvements and seek allocated funding, particularly targeted around the station area.

Ewell Village: Current Performance

9.51 Ewell Village has 66 retail/leisure business operators offering a good mix of key services and retail categories required for people’s day-to-day needs. These include chemists, opticians, pet supplies, dry cleaners, Post Office, taxi office, florist, dentist, two small convenience stores and a newsagent, and a good selection of cafés, restaurants, hairdressers and beauty salons. Unusually for a smaller town centre, Ewell Village has a selection of clothing and specialist comparison goods operators including a millinery hat designers and dance/ballet/gymnastics clothing and accessories.

9.52 A comparison between the 2011 and 2019 land use surveys has, however, identified a number of changes which should be responded to in the new Local Plan. In particular, the number of retail/leisure businesses has fallen from 70 to 57, with the decline of A1 uses being the primary cause – either through change of use to A2-A5 or to residential, offices, health services and showrooms. Whilst the proportion of Use Class A1 has fallen significantly, the proportion of Use Class A2 and A3 businesses has grown. The increase in beauty salons in the A2 category has been a strong trend, and there are no longer any banks or financial services present; but the number of vacant units and take-aways across the centre is particularly low.

9.53 A key change in the centre has been a noticeable loss of retail/leisure activity around the junction of Cheam Road and High Street. Combined with heavy traffic, this junction area has diluted the ‘flow’ and connectivity of the centre, inserting a separation within the frontage between north and south. The only key footfall drivers in the north of the centre are the Post Office and Ewell Spring Pharmacy, whilst the southern part of High Street remains the prime retail frontage. Observations of pedestrian footfall indicate that few people visit north and south during the same shopping trip/visit.

9.54 The quantitative analysis has identified that – like Stoneleigh Broadway – Ewell Village has a good comparison goods floorspace performance, trading at c.£3,958 per sq m net. This is a marginally stronger performance than Stoneleigh Broadway and is concluded to be good for a centre the size of Ewell Village, which performs the role of a District Centre.

9.55 Again, like Stoneleigh Broadway, the performance of convenience goods floorspace in Ewell Village is strong, although more in line with company average expectations. Proximity to the large out-of-centre Sainsbury's and more limited on-street parking might partly explain the reason for more conservative trading levels (when compared to Stoneleigh Broadway), but overall existing foodstore provision is considered important to the long term vitality and viability of Ewell Village.

9.56 In the context of wider recommendations, Ewell Village District Centre is not required to accommodate substantial additional comparison or convenience goods need. It is not required in policy to grow in scale, but – like Stoneleigh Broadway – the district centre must aim to consolidate and enhance its performance. Small scale infill sites well linked to the high street frontage might be appropriate for new retail floorspace and each proposal should be considered on its own merits.

Recommendations: Ewell Village District Centre

EW1: Retain Primary Shopping Area Boundary.

EW2: Retain Article 4 Direction removing permitted development for change of use from Use Class A1 to Use Class A2, and extend it to cover a greater length of the High Street towards the junction of Cheam Road and High Street. Many Use Class A2 Financial & Professional services have the appearance of offices, creating dead high street frontages and detracting from the vitality and mix of uses on the retail high street.

EW3: Prevent any further loss of Use Class A1 on the northern part (Bourne Hall end) of High Street which includes the Post Office and Pharmacy. These are two important anchors in this 'separated' frontage and must be protected over the Local Plan period if Ewell Village is to retain a vital and viable Primary Shopping Area. Any further loss will require a re-consideration of the Primary Shopping Frontage in the future.

EW4: Policy should prevent any further change of use to Use Class B1 (offices), Use Class D1 (clinics/nurseries/education/training centres) and Use Class D2 (fitness gyms). Like Use Class A2 these uses create closed inactive high street frontages and detract from the vitality and mix of uses on the retail high street.

EW5: Prevent the introduction of Use Class A5 into the Primary Shopping Area, promoting instead Use Class A1 and Use Class A3. There has been a recent substantial loss of retail uses and the overall policy response should be to halt this declining trend.

EW6: Seek investment for public realm and paving improvements throughout the town centre and particularly at the Cheam Road/High Street junction to encourage pedestrian circulation.

EW7: Retain free short-stay on-street car parking to support the local top up shopping role of the Village Centre.

Appendix 1

National Market Context

Appendix 1: National Market Context

1.1 The 2015 Study identified a number of trends in the retail and leisure sector which have influenced how people use town centres which, in turn, has important implications for the future spatial planning of centres and their long-term vitality and viability. Many of these trends have been well-documented in recent years and can broadly be summarised as follows:

- National/global economic trends;
- Growth in online shopping/multi-channel retailing;
- Changes in property/space requirements of retail and other town centre operators;
- An evolution in the role and function of many town centres away from retail and becoming more multi-dimensional 'destinations', with particular growth in the commercial leisure sector.
- Changes in the convenience goods sector, with a growth in discount retailers and switch towards 'little and often' food shopping.

1.2 The pace of change in the sector has continued unabated since the 2015 Study, with extensive further evidence published that confirms that in order to remain vital and viable locations, town centres will need to continue to evolve and adapt.

1.3 We present an update to each of the key sectoral changes summarised above in the sections below.

The evolving role of the town centre

1.4 Retail continues to remain a vitally important footfall driver in centres, and the main reason that residents are visiting town centres. A retail offer which mixes representation from national multiple retailers which act as 'anchors' and specialist independents which provide diversity is important to attracting footfall, and we expect this to continue over the course of the Council's new Local Plan period.

1.5 However, as the nature of retail continues to change and evolve, the last few years have seen a marked evolution in the role and function of town centres. Town centre visitors are increasingly seeking to combine shopping and leisure activities as an overall 'going out' experience, and therefore successful town centres offer a strong mix of both types of activity. There is a need for town centres to offer an 'experience', not simply be a place to shop. To ensure that town and district town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match.

1.6 Many town centres already have or are successfully moving towards becoming 'experience'-based destinations, with diverse markets strong food & beverage offers, independent / specialist cinemas or street food venues all types of activities where the unique selling points contribute to the overall vitality and viability of a centre. Seasonal events such as Christmas Markets can also act as significant footfall generators.

1.7 Alongside a strong retail and leisure offer will be the need for centres to act as genuine hubs for their communities. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that 'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub'.

1.8 By incorporating a wide range of uses - which could also include cultural space, co-working space, workspace for SMEs, community facilities such as libraries, or health and fitness facilities, or education space for example - users can be attracted at different times of the day, and the 'life' of the town centre extends beyond retail trading hours and attracts a broader mix of users. Such an approach can be applied both to new developments, and through appropriate repurposing of existing redundant floorspace in centres.

1.9 Residential uses, including student accommodation, can also play a vital role in supporting the wider vitality and viability of town centres, by delivering additional footfall particularly at evenings and weekends. This naturally lends itself to supporting a centre's evening/night-time economy, but consideration will also need to be given to how a growing residential population can support a town centre's retail community. This could include, for example, ensuring a co-ordinated approach to later trading hours.

1.10 As set out in the previous section, the Council have identified Epsom town centre as a major growth location, and therefore a co-ordinated approach between the Council, retailers and organisations such as the Epsom BID to ensure that the vitality and viability of the town centre can benefit to as great a degree as possible will be important.

Economic trends

1.11 Since the 2015 Study was published, the UK's decision to leave the European Union has become an influencing factor in forecasts of economic growth, with short term uncertainty in particular likely to impact on consumer confidence and spending.

1.12 Our data provider Experian published their most recent 'Retail Planner Briefing Note' in December 2018. This report sets out guidance on forecast expenditure growth rates and forecasts of 'special forms of trading' (e.g. online shopping), which we have incorporated into our updated retail capacity forecasts. Further details of this are provided in Section 7 of this report.

1.13 Experian forecast that the UK economy will remain on a 'sluggish growth trajectory' for the next couple of years, amid ongoing uncertainty over the final outcome of Brexit negotiations. Experian consider that this uncertainty '*is likely to keep businesses and households cautious, and hence* growth in both investment and consumer spending is likely to remain lacklustre. The recent loosening in the Government's fiscal stance is unlikely to offset the drag on the domestic economy'.

1.14 In the medium term, Experian forecast that if a 'soft' Brexit deal is successfully struck (i.e. one which the UK gaining similar access to the single market as it does currently), then a return to a 'long run average of growth' from 2023 onwards, with economic growth remaining constrained during the transition period. Experian advise that once a deal is struck, there is potential for a bounce-back in the economy as uncertainty clears, although this is likely to be dependent on the length of time it takes to conclude an agreement.

1.15 Should a 'soft' Brexit deal not be concluded, and a 'hard'/no deal Brexit prove to be the outcome of negotiations (or an agreement is not concluded within 4 years), this would result in a longer period whereby business plans and consumer spending are undermined by uncertainty, potentially reducing expenditure growth rates over the medium term. The long term economic consequences of Brexit will ultimately be dependent on the terms of the new UK-EU relationship.

Growth in online shopping & multi-channel retailing

1.16 Online shopping has become a firmly established method of shopping, and has delivered both challenges and opportunities for the traditional town centre. The boundaries of physical and online retail are becoming increasingly blurred as a result of mobile and app-based shopping, together with quasi-retail trends such as 'click & collect'. Again, these trends were established at the time of the 2015 Study, but the sector has experienced further growth in the subsequent years.

1.17 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits. The most recent data available from the ONS on online usage is from 2018, which identified that:

- 90% of households have Internet access, an increase from 83% in 2013 and 65% in 2008.
- 86% of adults use the Internet every day. Daily internet usage has more than doubled since 2008.
- 78% use mobile phones/smartphones to access the Internet. In certain age groups this figure is substantially higher: in the 25-34 year old age group, the figure is 99%; for 16-24 year olds it is 98%; and for 35-44 year olds it is 96%.
- 78% of adults have bought goods or services online in the last 12 months, up 1 percentage point since 2017 and 25 percentage points since 2008.
- 95% of adults in the 16-24 year old age group shop online, and 96% of adults in the 25-34 year old age group shop online. By contrast, only 48% of those over 65 years shop online – however this age group has shown the largest increase in online shopping uptake, increasing from 16% in 2008.

Frequency and nature of online shopping

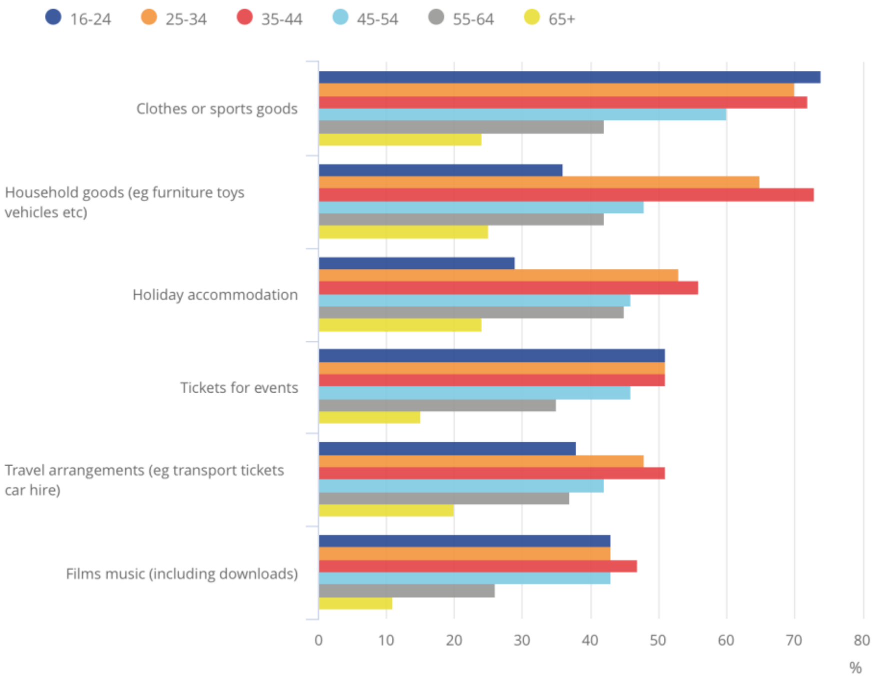
1.18 When looking at the frequency of online shopping and the amount typically spent online, it can be seen that considerable amounts of spend are now being diverted online, which is spend lost from 'bricks and mortar' town centre stores. The ONS[1] identifies that:

- Of those adults who purchased online in the last three months, adults aged 16-24 typically shopped online once or twice; however those in the 25-34, 35-44 and 45-54 age groups most typically shopped online at least ten times over a three month period. In the 35-44 age group, 48% shopped online more than ten times over the three month period.
- Across all age groups, shoppers typically spent between £100 and £499 online in the last three months. In the 35-44 year age group, 30% of adults spent over £1,000 online in the three month period.

1.19 In terms of the range of goods sold, the most popular categories for goods bought online are clothes and sports goods (purchased by 55% of adults within the last twelve months), followed by household goods (e.g furniture, toys); holiday accommodation; tickets for events; travel arrangements (e.g. train tickets, car hire); and films and music (including downloads). **Figure 2.1** shows the frequency of purchase of each of these types of goods by age group.

[1] 2018-based data

Figure 2.1 **Online purchases by age group in Great Britain, 2018**



Source: Office of National Statistics

1.20 Four out of the six goods categories listed above (clothes/sports goods, household goods, holiday accommodation and films/music) are those which historically been purchased through physical stores, and the shift of spending to online platforms in these sectors has resulted in a number of operators ceasing trading, reducing their network of physical stores, or moving from a mixed physical/online to online only platform.

1.21 Online-only retailers selling fashion goods - such as ASOS, Amazon and Boohoo for example – now account for 38% of the UK online fashion market. These retailers do not have a physical high street presence, and are therefore able to be more responsive to new trends in the sector, and also do not have the overheads associated with 'bricks and mortar' stores, enabling them to be more price-competitive.

Clothing and homewares retailers

1.22 Trends in the clothing and homewares sectors are particularly important to monitor, as in higher-order centres (Epsom town centre, Kingston and Sutton all being examples of these) clothing operators and department stores (for household goods) can act as retail 'anchors' and footfall drivers, and typically trade from amongst the largest units in town centres. The impact of a closure of these stores can therefore potentially have wider implications on the vitality and viability of a centre.

1.23 Both clothing retailers and department store and general merchandise/homewares retailers have been impacted by the above shift towards multi-channel retailing, meaning that, when coupled with often high levels of business rates and rental agreements, the trading viability of stores has often become more marginal. For example, since the 2015 Study:

- the department store House of Fraser has closed a number of stores having entered administration in 2018, and Debenhams confirmed plans in April 2019 to close 22 underperforming stores. House of Fraser has representation in the Borough in the Ashley Centre in Epsom town centre.

- Marks & Spencer confirmed that it would close 100 stores by 2022, many of which would be its traditional ‘clothing and home’ branches. Other stores have been converted to food-only stores. The M&S branch in Epsom town centre is understood to be unaffected at the present time.
- Arcadia Group (which owns fashion brands including Topshop, Topman, Burton and Dorothy Perkins) recently announced plans to close branches, predominantly when leases in their premises expire.
- 2018 saw a number of other long-standing retailers entering administration, in many cases resulting in extensive store closures. These included Poundworld, Maplin, Toys R Us and HMV, although the latter was subsequently acquired from administration and the majority of stores remained trading.
- Administrations to date in 2019 include value clothing retailer Select, upmarket clothing retailer LK Bennett, and café chain Patisserie Valerie.

1.24 However, other fashion and household/general merchandise retailers continue to perform well, particularly those at the middle to value end of the market. Retailers such as Primark and H&M continue to expand their store portfolio, with the latter recently launching standalone ‘H&M Home’ stores in a number of locations including central London, Westfield London and Birmingham. Primark have recently opened their largest store to date in Birmingham city centre. Other retailers such as Next, TK Maxx, B&M, Sports Direct (and other brands owned by the same parent company such as Flannels and USC) and Wilko also continue to actively expand their store portfolio and invest in town centre locations.

1.25 Importantly for town centres, Mintel’s ‘Online Fashion UK 2017’ report found that only 15% of online shoppers buy all of their fashion items online - with the remaining 85% using both online and physical stores. Mintel state that this highlights the importance of having a ‘joined up’ shopping experience. Many retailers are embracing this - as well as ‘click and collect’ (discussed below), many retailers now offer the ability to check stock levels in a particular store on their website, thus avoiding a wasted trip if a customer wants to buy a specific item, and/or offer in-store kiosks or tablets which enable a wider range of products and sizes to be browsed and ordered by a customer.

Click & Collect

1.26 The click & collect sector continues to benefit from increasing levels of take-up, and research from GlobalData indicates the click & collect market will grow by a further 46% by 2023. Click & collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of the operator. The popularity of click & collect is clearly an important opportunity for town centres, as it can act as a footfall generator in its own right. GlobalData research identify that 39% of consumers make an additional purchase when collecting an item from a store.

1.27 Since the 2017 Study the Click & Collect has continued to advance, as efficient delivery options become an expected norm for consumers. Delivery windows are shortening, with retailers such as Next now offering one hour delivery in certain areas.

1.28 Most major retailers have also partnered with courier companies such as DPD and Collect+ to offer click & collect facilities at an ever-growing network of other collection points such as local newsagents, post offices or Amazon lockers. The latter development can also help to support local centres/neighbourhood shopping parades where these facilities are present.

1.29 A threat to the continued growth of click & collect is the rise of instant delivery and saver delivery. An increasing number of both food and non-food retailers are offering same-day delivery on certain products, including Sainsbury's, Argos, River Island and Maplin. Retailers are increasingly partnering with companies such as Shutl - which allows customers to receive packages locally in as little as 90 minutes, or alternatively choose their own convenient one-hour delivery window - to fulfill same day orders.

1.30 The introduction of delivery passes - whereby a consumer pays a certain amount per year for premium delivery options including next day or guaranteed timeslot delivery of their online shopping order, also appears to be growing in popularity with retailers such as ASOS, New Look and Boohoo now offering this service. The market leader in this type of shopping option remains Amazon Prime, which offers subscribers paying a monthly fee one-day delivery on orders from the Amazon website, alongside access to other subscriber-only services including movie, TV and music streaming. This emerging trend will need to be monitored in terms of its popularity versus click & collect, particularly as it does not deliver the same 'spin off' benefits for town centres in terms of linked spending.

The Commercial Leisure Sector

1.31 Commercial leisure is playing an increasingly important role in the vitality and viability of town centres, as the nature of retail and high street shopping continues to evolve. In many new town centre schemes which have opened in recent years, leisure has replaced retail as the 'anchor' tenant to a scheme.

1.32 'Family dining' restaurants increased in popularity considerably in the years following the last recession, reflecting a wider trend for a higher proportion of consumer expenditure to be spent on socialising and leisure activities rather than shopping. These restaurants have also benefited from many new town centre development schemes having an increasing leisure-orientated focus, enabling them to play a complementary role to a nearby new cinema, for example, as part of the creation of an attractive leisure destination.

1.33 Long-time mainstays of the family dining sector such as Pizza Express, Nando's, Café Rouge and Zizzi expanded and generally continue to perform well. These were joined by a new wave of operators such as Byron, GBK, Franco Manca, Pho and Bill's, who have significantly expanded store numbers in recent years, often with the backing of private equity firms.

1.34 There are signs, however, that this sector of the market may be approaching saturation, and the increased competition in the sector is leading to causalities. Jamie's Italian has recently announced plans to close the majority of its branches; Byron is undergoing restructuring and has closed 20 outlets, and Strada has closed one third of its branches. Analysts suggest in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators' profits, whilst the Brexit decision has, as we have set out above, negatively impacted on consumer confidence and therefore spending.

1.35 The cinema market continues to perform strongly, benefiting from consumers choosing to spend more of their disposable income on leisure activities. A planning application has been submitted for a new Picturehouse cinema in Epsom town centre, with the application currently undetermined.

The Convenience Sector

1.36 The scale of change which has taken place in the convenience sector in recent years has been described by data providers Mintel as 'the trends of the whole of the post-war era [being] reversed'. The changes in the sector can be summarised as follows:

- Superstores are seeing a reduction in market share;

- Convenience (small-format) stores of the market leaders (e.g. Sainsbury's Local, Tesco Express) and Co-Op are gaining market share;
- 'Discount retailers', principally Aldi and Lidl, are achieving strong levels of growth and rapidly expanding their store portfolios;
- Certain retailers which are classified as non-food retailers (for example Marks & Spencer, Home Bargains and Poundland) are increasing their share of food spending;
- Online demand is continuing to grow (although not to the same extent as non-food shopping).

1.37 As with other trends discussed above, these trends were established to varying degrees at the time of the 2015 Study, and have subsequently continued:

- Marks & Spencer are predominantly focussing future growth on expanding their food sales, and in 2019 announced plans to open a number of larger-format foodhalls.
- Aldi and Lidl continue to grow their store numbers and attract an increasing share of the grocery market – Aldi's market share has increased from 3.0% in 2013 to 7.8% in 2018, and Lidl's has increased from 2.8% to 5.5% over the same period. Both operators are actively expanding in London, and Aldi have opened smaller-format 'metro' stores on high street locations in Kilburn, Tooting and Balham. In late 2018, Tesco opened its own discount-format retailer, Jack's, in a number of converted Tesco stores.
- Convenience (small-format) stores continue to open, although not at the pace seen in recent years as availability of sites becomes exhausted. However Co-Op in particular are actively expanding their store portfolio as well as refurbishing existing stores.
- New larger-format supermarket developments are rare (except discount retailers), with the major operators instead focused on making their existing store networks trade more efficiently.

Banks & Financial Services

1.38 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in centres at all levels in the hierarchy, the presence of a wide range of banks and building societies formed an important part of a centre's mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.

1.39 The total number of branches operated by the 'big six' UK banks (Barclays, HBOS, HSBC, Lloyds, Natwest and Santander) declined from 11,240 in 1997 to 7,022 in 2014[2], although in some locations this decline has been partially offset by the emergence of 'challenger' banks such as Metro Bank, Virgin Money and TSB, with the former of these in particular rapidly expanding its High Street presence. The pace of closures has gathered pace in recent years however; for example in 2017, RBS announced plans to close one quarter of its branch network.

[2] Parliament Research Briefing on bank closures, 2018 research briefings.files.parliament.uk/documents/SN00385/SN00385.pdf

1.40 According to research from CACI, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017.

1.41 Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in primary shopping areas, which are in some instances challenging to let.

1.42 It would appear that, for the time being at least, banks and building societies are generally keen to retain a visible presence in larger/higher-order town centres, but smaller branches in lower-order centres with a more limited customer base appear more vulnerable.

Out-of-centre retailing

1.43 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000.

1.44 The recovery of market confidence which took place since 2013 benefited out-of-town retailing. Vacancy rates fell, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. Some traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M.

1.45 Epsom & Ewell Borough has relatively limited retail warehouse provision, with the exception of a three retail warehouse units – currently occupied by Homebase, Wickes and Halfords. However, there are large concentrations of retail warehousing at Purley Way, Croydon (which includes one of London's three IKEA stores, as well as a John Lewis at Home and several home/furniture stores) and at Shannon Corner, New Malden, both of which are easily accessible to many residents of the Borough (although less so by public transport).

Appendix 2

Convenience Goods Need Forecasts

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	*60,784*	*61,958*	*78,034*	*19,056*	*15,653*	*17,212*	*18,189*	*24,738*	*31,570*	*32,419*	*32,893*	*100,776*	***493,282***
2019	62,698	63,779	80,649	19,582	16,081	17,681	18,723	25,329	32,301	33,500	33,854	104,296	**508,473**
2022	65,073	66,003	83,570	20,149	16,611	18,246	19,268	25,798	32,778	34,513	34,616	107,740	**524,365**
2027	68,846	69,322	87,711	21,079	17,453	19,181	20,076	26,588	33,590	36,140	35,785	112,941	**548,712**
2032	72,101	72,253	91,311	21,974	18,235	19,869	20,823	27,335	34,457	37,514	36,831	117,436	**570,139**
Change 2019-32	***9,403***	***8,474***	***10,662***	***2,392***	***2,154***	***2,188***	***2,100***	***2,006***	***2,156***	***4,014***	***2,977***	***13,140***	***61,666***

Source: *Experian Micromarketer (2017-based population forecasts)*

Table 1a - Survey area postcode sectors

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

Table 2 - Survey area per capita expenditure forecasts, convenience goods (locally-derived SFT)

	Expenditure per capita (£)	SFT (%) (Experian)	SFT (£)	Expenditure per capita less SFT
2019	2,485	11.6%	288	2,197
2022	2,530	12.4%	314	2,216
2027	2,543	12.8%	325	2,217
2032	2,555	13.2%	337	2,218

Expenditure growth rates: 0.1% per annum. 2017 prices.

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 16 (December 2018).

Table 3 - Survey area retail expenditure, convenience goods

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)
2019	137.73	140.11	177.16	43.02	35.33	38.84	41.13	55.64	70.96	73.59	74.37	229.11	**1,116.98**
2022	144.22	146.28	185.21	44.66	36.81	40.44	42.70	57.18	72.64	76.49	76.72	238.78	**1,162.13**
2027	152.64	153.70	194.47	46.74	38.70	42.53	44.51	58.95	74.48	80.13	79.34	250.41	**1,216.60**
2032	159.93	160.26	202.53	48.74	40.45	44.07	46.19	60.63	76.43	83.21	81.69	260.48	**1,264.61**
Change 2019-32	***22.19***	***20.16***	***25.37***	***5.72***	***5.12***	***5.23***	***5.06***	***4.99***	***5.47***	***9.62***	***7.33***	***31.37***	***147.63***

Source: Tables 1 & 2. 2017 prices.

Table 4 - Convenience goods market share (%) - 2019

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Convenience goods floorspace in Epsom & Ewell (main stores)												
Epsom town centre												
Waitrose, Ashley Centre	6.6%	0.2%	0.2%	1.7%	0.2%	0.7%	1.1%	1.3%	0.2%	0.0%	0.1%	0.0%
Marks & Spencer, Ashley Centre	2.3%	0.0%	0.0%	0.0%	0.4%	0.9%	2.3%	0.6%	0.2%	0.8%	0.3%	0.2%
Tesco Express, Epsom Station	0.6%	0.4%	1.9%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Upper High Street	0.4%	1.1%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Station Approach	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Sub-total, Epsom town centre stores	*10.3%*	*1.6%*	*2.1%*	*1.7%*	*1.9%*	*1.7%*	*3.4%*	*1.9%*	*0.4%*	*0.8%*	*0.4%*	*0.6%*
Ewell district centre												
Sainsbury's Local, Cheam Road	0.9%	1.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Co-Op, High Street	1.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Ewell district centre stores	*1.8%*	*1.5%*	*0.0%*	*0.5%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.2%*
Stoneleigh district centre												
Sainsbury's Local, Broadway	0.0%	6.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Co-Op, Broadway	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Stoneleigh district centre stores	*0.0%*	*10.1%*	*0.0%*	*0.8%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.0%*	*0.3%*
Kingston Road local centre												
Aldi, Kingston Road	6.8%	7.8%	0.5%	1.6%	0.0%	0.1%	2.4%	0.4%	0.0%	1.4%	0.7%	5.7%
Co-op, Kingston Road	0.7%	1.3%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Sub-total, Kingston Road local centre stores	*7.5%*	*9.0%*	*0.5%*	*1.9%*	*0.0%*	*0.1%*	*2.4%*	*0.4%*	*0.0%*	*1.4%*	*1.1%*	*5.7%*
Chessington Road (Green Lanes) local centre												
Co-Op, Chessington Road	2.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%
Ruxley Lane (Gatley Avenue) local centre												
Tesco Express, Ruxley Lane	1.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
Other stores (not within a defined centre)												
Sainsbury's, Kiln Lane, Epsom	35.3%	10.6%	0.0%	10.4%	2.6%	1.7%	5.9%	4.1%	0.4%	6.3%	1.7%	0.3%
Co-Op, Ruxley Lane, West Ewell	3.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Esso PFS, Reigate Road, Epsom	1.9%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Tesco Express, Horton Retail Centre, Epsom	2.4%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*42.8%*	*12.0%*	*0.2%*	*10.4%*	*2.6%*	*1.7%*	*5.9%*	*4.1%*	*0.4%*	*6.4%*	*1.7%*	*0.5%*
Total for Epsom & Ewell Borough (A)	**66.9%**	**35.1%**	**2.8%**	**15.2%**	**4.5%**	**3.5%**	**11.7%**	**6.3%**	**0.8%**	**9.5%**	**3.2%**	**7.8%**

Table 4 - Convenience goods market share (%) - 2019 - continued

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Convenience goods floorspace outside Epsom & Ewell Borough												
Other main stores in survey area												
Waitrose, Worcester Park (zone 2)	0.4%	6.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Sainsbury's Local, Worcester Park (zone 2)	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Asda, St Nicholas Way, Sutton (zone 3)	0.4%	1.8%	7.3%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Morrisons, High Street, Sutton (zone 3)	0.0%	0.9%	10.6%	1.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, High Street, Sutton (zone 3)	0.1%	1.5%	15.4%	1.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, London Road, North Cheam (zone 3)	1.1%	21.5%	11.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.5%	4.5%	15.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
Waitrose, Banstead (zone 4)	2.7%	2.3%	1.0%	28.3%	13.2%	4.3%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Burgh Heath (zone 7)	7.8%	0.0%	1.8%	30.3%	24.3%	6.0%	35.2%	1.3%	1.3%	2.1%	0.5%	0.0%
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0%	0.0%	0.0%	0.0%	0.5%	0.3%	11.6%	11.5%	13.7%	0.4%	0.0%	0.0%
Lidl, North Street, Leatherhead (zone 8)	1.9%	0.0%	0.0%	0.0%	0.0%	0.4%	0.9%	10.9%	8.9%	0.0%	0.0%	0.0%
Tesco, Oxshott Road, Leatherhead (zone 8)	1.3%	0.0%	0.0%	0.0%	0.0%	1.1%	6.6%	34.8%	18.5%	5.6%	0.6%	0.0%
M&S Foodhall, Ashtead (zone 8)	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	9.2%	0.6%	0.0%	0.0%	0.0%
Tesco Express, Ashtead (zone 8)	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	11.2%	0.0%	0.0%	0.3%	0.0%
Waitrose, Esher (zone 11)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	12.9%	0.0%
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	1.8%	9.9%
Waitrose, Surbiton (zone 12)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	9.6%	7.3%
Other main stores in survey area (outside E&E Borough)	4.5%	12.7%	19.9%	13.1%	13.0%	16.3%	16.9%	5.6%	26.9%	26.7%	20.2%	17.3%
Sub-total, other stores in survey area (B)	*22.2%*	*56.8%*	*82.2%*	*78.2%*	*52.7%*	*28.4%*	*78.0%*	*84.6%*	*70.5%*	*54.2%*	*45.9%*	*41.5%*
Stores outside survey area*												
**stores with a market share >10% from any individual zone*												
Morrisons, Reigate	0.0%	0.2%	0.0%	0.2%	0.9%	39.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
Sainsbury's, Bridge Way, Cobham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	10.4%	2.3%	8.4%	0.7%
Sainsbury's, London Road, Redhill	0.0%	0.0%	0.0%	0.0%	1.4%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Beverley Way, New Malden	2.1%	2.5%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	9.2%	3.7%	13.9%
Tesco, Hurst Road, West Molesey	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	13.8%	0.3%
Other main stores outside survey area	7.7%	3.8%	12.9%	4.3%	39.5%	13.8%	7.0%	6.0%	13.7%	23.3%	20.8%	34.2%
Sub-total, stores outside survey area (C)	*9.7%*	*6.5%*	*13.0%*	*4.5%*	*41.7%*	*65.9%*	*7.2%*	*6.5%*	*25.1%*	*35.0%*	*46.7%*	*49.1%*
Total for stores outside Borough & survey area (B+C)	**31.9%**	**63.2%**	**95.2%**	**82.7%**	**94.4%**	**94.3%**	**85.2%**	**91.1%**	**95.6%**	**89.1%**	**92.6%**	**90.6%**
Local convenience goods												
Local shops & other, Epsom town centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops & other, elsewhere in Epsom & Ewell Borough	1.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Local shops, elsewhere in survey area (outside E&E Borough)	0.0%	1.3%	1.9%	2.1%	1.1%	2.2%	2.4%	2.6%	3.6%	1.3%	4.1%	1.6%
Total for local shops (D)	**1.2%**	**1.7%**	**2.0%**	**2.1%**	**1.1%**	**2.2%**	**3.1%**	**2.6%**	**3.6%**	**1.3%**	**4.1%**	**1.6%**
Total (A+B+C+D)	**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: NEMS Household Survey, August 2019

Table 5 - Convenience goods spend (£m) 2019

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2019	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.1	0.2	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.2**	**1.1%**
Marks & Spencer, Ashley Centre	3.2	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	**6.4**	**0.6%**
Tesco Express, Epsom Station	0.8	0.5	3.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.4%**
Co-Op, Upper High Street	0.6	1.5	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.4**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.3*	*2.3*	*3.8*	*0.7*	*0.7*	*0.7*	*1.4*	*1.0*	*0.3*	*0.6*	*0.3*	*1.4*	***27.4***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.3**	**0.3%**
Co-Op, High Street	1.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**1.9**	**0.2%**
Sub-total, Ewell district centre stores	*2.5*	*2.1*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.3***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**9.8**	**0.9%**
Co-Op, Broadway	0.0	5.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.6**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.2*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***15.3***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.3	10.9	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.1	**37.7**	**3.4%**
Co-op, Kingston Road	1.0	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.2**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.3*	*12.7*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*13.1*	***40.8***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.6	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**5.6**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.1**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	48.7	14.9	0.0	4.5	0.9	0.7	2.4	2.3	0.3	4.6	1.3	0.8	**81.3**	**7.3%**
Co-Op, Ruxley Lane, West Ewell	4.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	**0.4%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.6	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.0**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.1**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*59.0*	*16.8*	*0.3*	*4.5*	*0.9*	*0.7*	*2.4*	*2.3*	*0.3*	*4.7*	*1.3*	*1.2*	***94.3***	***8.4%***
Total for Epsom & Ewell Borough (A)	**92.2**	**49.1**	**4.9**	**6.5**	**1.6**	**1.4**	**4.8**	**3.5**	**0.6**	**7.0**	**2.4**	**18.0**	**191.9**	**17.2%**

Table 5 - Convenience goods spend (£m) 2019 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2019	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**11.8**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	6.9	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	**7.3**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.5	12.9	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**17.1**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.2	18.8	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**20.8**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.3	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.5**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.5	30.1	19.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	**61.2**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.3	26.5	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	**38.6**	**3.5%**
Waitrose, Banstead (zone 4)	3.7	3.2	1.9	12.2	4.7	1.7	2.5	0.0	0.0	0.0	0.0	0.0	**29.8**	**2.7%**
Asda, Burgh Heath (zone 7)	10.7	0.0	3.1	13.0	8.6	2.3	14.5	0.7	0.9	1.5	0.4	0.0	**55.8**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.8	6.4	9.7	0.3	0.0	0.0	**21.5**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	6.1	6.3	0.0	0.0	0.0	**15.6**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	19.4	13.1	4.1	0.5	0.0	**42.0**	**3.8%**
M&S Foodhall, Ashtead (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	5.1	0.5	0.0	0.0	0.0	**7.2**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.2	0.0	0.0	0.2	0.0	**6.9**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	9.6	0.0	**15.2**	**1.4%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.9	1.3	22.7	**27.0**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	7.2	16.8	**29.7**	**2.7%**
Other main stores in survey area (outside E&E Borough)	6.2	17.7	35.3	5.6	4.6	6.3	6.9	3.1	19.1	19.6	15.0	39.6	**179.2**	**16.0%**
Sub-total, other stores in survey area (B)	*30.5*	*79.5*	*145.6*	*33.7*	*18.6*	*11.0*	*32.1*	*47.1*	*50.1*	*39.9*	*34.1*	*95.1*	***617.2***	***55.3%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.4	0.0	0.0	0.7	0.0	0.0	0.0	**16.7**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.4	1.7	6.3	1.5	**17.2**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.8	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.5%**
Tesco Extra, Beverley Way, New Malden	2.8	3.5	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.7	2.7	31.9	**48.0**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	10.2	0.8	**11.2**	**1.0%**
Other main stores outside survey area	10.5	5.4	22.8	1.8	13.9	5.4	2.9	3.3	9.7	17.1	15.5	78.3	**186.8**	**16.7%**
Sub-total, stores outside survey area (C)	*13.4*	*9.1*	*23.1*	*1.9*	*14.7*	*25.6*	*3.0*	*3.6*	*17.8*	*25.7*	*34.8*	*112.4*	***285.2***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**43.9**	**88.6**	**168.7**	**35.6**	**33.3**	**36.6**	**35.0**	**50.7**	**67.8**	**65.6**	**68.9**	**207.5**	**902.3**	***80.8%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.3	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.3**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.4	0.9	0.4	0.8	1.0	1.4	2.6	1.0	3.1	3.7	**20.1**	**1.8%**
Total for local shops (D)	**1.7**	**2.4**	**3.5**	**0.9**	**0.4**	**0.8**	**1.3**	**1.4**	**2.6**	**1.0**	**3.1**	**3.7**	**22.7**	**2.0%**
Total (A+B+C+D)	**137.7**	**140.1**	**177.2**	**43.0**	**35.3**	**38.8**	**41.1**	**55.6**	**71.0**	**73.6**	**74.4**	**229.1**	**1,117.0**	**100.0%**

Source: Table 3, Table 4

Table 6 - Convenience goods spend (£m) 2022

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2022	**144.2**	**146.3**	**185.2**	**44.7**	**36.8**	**40.4**	**42.7**	**57.2**	**72.6**	**76.5**	**76.7**	**238.8**	**1,162.1**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.5	0.3	0.4	0.8	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**12.8**	**1.1%**
Marks & Spencer, Ashley Centre	3.3	0.0	0.0	0.0	0.1	0.4	1.0	0.3	0.2	0.6	0.2	0.5	**6.6**	**0.6%**
Tesco Express, Epsom Station	0.8	0.6	3.5	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	**0.4%**
Co-Op, Upper High Street	0.6	1.6	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Co-Op, Station Approach	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.6**	**0.1%**
Sub-total, Epsom town centre stores	*14.9*	*2.4*	*3.9*	*0.8*	*0.7*	*0.7*	*1.5*	*1.1*	*0.3*	*0.6*	*0.3*	*1.5*	***28.6***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.3	1.5	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.5**	**0.3%**
Co-Op, High Street	1.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.0**	**0.2%**
Sub-total, Ewell district centre stores	*2.7*	*2.2*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.5***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	9.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	**10.2**	**0.9%**
Co-Op, Broadway	0.0	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*14.8*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.8*	***16.0***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.8	11.4	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.6	13.7	**39.3**	**3.4%**
Co-op, Kingston Road	1.0	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.3**	**0.3%**
Sub-total, Kingston Road local centre stores	*10.8*	*13.2*	*0.9*	*0.8*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.0*	*0.8*	*13.7*	***42.6***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**5.8**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.3**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	51.0	15.5	0.0	4.6	1.0	0.7	2.5	2.3	0.3	4.8	1.3	0.8	**84.9**	**7.3%**
Co-Op, Ruxley Lane, West Ewell	4.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	**0.4%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.8	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.2**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.5	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.3**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*61.8*	*17.5*	*0.3*	*4.6*	*1.0*	*0.7*	*2.5*	*2.3*	*0.3*	*4.9*	*1.3*	*1.2*	***98.5***	***8.5%***
Total for Epsom & Ewell Borough (A)	**96.5**	**51.3**	**5.2**	**6.8**	**1.7**	**1.4**	**5.0**	**3.6**	**0.6**	**7.3**	**2.5**	**18.7**	**200.4**	**17.2%**

Table 6 - Convenience goods spend (£m) 2022 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2022	**144.2**	**146.3**	**185.2**	**44.7**	**36.8**	**40.4**	**42.7**	**57.2**	**72.6**	**76.5**	**76.7**	**238.8**	**1,162.1**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.9	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	**12.3**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**7.6**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.6	13.5	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**17.8**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	19.6	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**21.7**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.2	28.5	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.8**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.6	31.4	20.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.3	**64.0**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.6	27.7	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	**40.3**	**3.5%**
Waitrose, Banstead (zone 4)	3.9	3.4	1.9	12.6	4.9	1.7	2.6	0.0	0.0	0.0	0.0	0.0	**31.0**	**2.7%**
Asda, Burgh Heath (zone 7)	11.2	0.0	3.2	13.5	8.9	2.4	15.0	0.7	0.9	1.6	0.4	0.0	**58.1**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.9	6.6	10.0	0.3	0.0	0.0	**22.1**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.8	0.0	0.0	0.0	0.0	0.2	0.4	6.2	6.5	0.0	0.0	0.0	**16.1**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.9	0.0	0.0	0.0	0.0	0.4	2.8	19.9	13.4	4.3	0.5	0.0	**43.3**	**3.7%**
M&S Foodhall, Ashtead (zone 8)	1.5	0.0	0.0	0.0	0.0	0.0	0.2	5.3	0.5	0.0	0.0	0.0	**7.4**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.4	0.0	0.0	0.2	0.0	**7.1**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	9.9	0.0	**15.7**	**1.4%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	1.3	23.7	**28.1**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	7.4	17.5	**30.8**	**2.7%**
Other main stores in survey area (outside E&E Borough)	6.5	18.5	36.9	5.8	4.8	6.6	7.2	3.2	19.5	20.4	15.5	41.3	**186.3**	**16.0%**
Sub-total, other stores in survey area (B)	*32.0*	*83.0*	*152.2*	*34.9*	*19.4*	*11.5*	*33.3*	*48.4*	*51.2*	*41.4*	*35.2*	*99.1*	***641.6***	***55.2%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	16.1	0.0	0.0	0.7	0.0	0.0	0.0	**17.4**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.5	1.8	6.5	1.6	**17.7**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	5.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.5%**
Tesco Extra, Beverley Way, New Malden	3.0	3.6	0.3	0.0	0.0	0.0	0.1	0.0	0.0	7.0	2.8	33.2	**50.0**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	10.6	0.8	**11.5**	**1.0%**
Other main stores outside survey area	11.0	5.6	23.9	1.9	14.5	5.6	3.0	3.4	10.0	17.8	16.0	81.6	**194.3**	**16.7%**
Sub-total, stores outside survey area (C)	*14.0*	*9.5*	*24.2*	*2.0*	*15.4*	*26.7*	*3.1*	*3.7*	*18.2*	*26.7*	*35.9*	*117.2*	***296.5***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**46.0**	**92.5**	**176.4**	**37.0**	**34.7**	**38.1**	**36.4**	**52.1**	**69.5**	**68.2**	**71.1**	**216.2**	938.1	*80.7%*
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.4	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.4**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	2.0	3.5	0.9	0.4	0.9	1.0	1.5	2.6	1.0	3.2	3.8	**20.8**	**1.8%**
Total for local shops (D)	**1.8**	**2.5**	**3.7**	**0.9**	**0.4**	**0.9**	**1.3**	**1.5**	**2.6**	**1.0**	**3.2**	**3.8**	23.6	2.0%
Total (A+B+C+D)	**144.2**	**146.3**	**185.2**	**44.7**	**36.8**	**40.4**	**42.7**	**57.2**	**72.6**	**76.5**	**76.7**	**238.8**	**1,162.1**	**100.0%**

Source: Table 3, Table 4

Table 7 - Convenience goods spend (£m) 2027

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2027	**152.6**	**153.7**	**194.5**	**46.7**	**38.7**	**42.5**	**44.5**	**59.0**	**74.5**	**80.1**	**79.3**	**250.4**	**1,216.6**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	10.1	0.3	0.5	0.8	0.1	0.3	0.5	0.8	0.1	0.0	0.1	0.0	**13.5**	**1.1%**
Marks & Spencer, Ashley Centre	3.5	0.0	0.0	0.0	0.1	0.4	1.0	0.3	0.2	0.7	0.2	0.5	**7.0**	**0.6%**
Tesco Express, Epsom Station	0.9	0.6	3.7	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	**0.4%**
Co-Op, Upper High Street	0.6	1.7	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.2%**
Co-Op, Station Approach	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	**1.7**	**0.1%**
Sub-total, Epsom town centre stores	*15.8*	*2.5*	*4.1*	*0.8*	*0.7*	*0.7*	*1.5*	*1.1*	*0.3*	*0.7*	*0.3*	*1.6*	***30.2***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.3	1.6	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.7**	**0.3%**
Co-Op, High Street	1.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.1**	**0.2%**
Sub-total, Ewell district centre stores	*2.8*	*2.3*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.8***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	9.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**10.7**	**0.9%**
Co-Op, Broadway	0.0	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.1**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*15.6*	*0.0*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.9*	***16.8***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	10.4	11.9	1.0	0.7	0.0	0.0	1.1	0.2	0.0	1.1	0.6	14.3	**41.3**	**3.4%**
Co-op, Kingston Road	1.1	1.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.5**	**0.3%**
Sub-total, Kingston Road local centre stores	*11.5*	*13.9*	*1.0*	*0.9*	*0.0*	*0.0*	*1.1*	*0.2*	*0.0*	*1.1*	*0.9*	*14.3*	***44.8***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	4.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**6.2**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.4**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	53.9	16.3	0.0	4.9	1.0	0.7	2.6	2.4	0.3	5.1	1.4	0.8	**89.5**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	4.8	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.5%**
Tesco Express, Esso PFS, Reigate Road, Epsom	2.9	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.3**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.7	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.6**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*65.4*	*18.4*	*0.3*	*4.9*	*1.0*	*0.7*	*2.6*	*2.4*	*0.3*	*5.2*	*1.4*	*1.3*	***103.9***	***8.5%***
Total for Epsom & Ewell Borough (A)	**102.1**	**53.9**	**5.4**	**7.1**	**1.7**	**1.5**	**5.2**	**3.7**	**0.6**	**7.6**	**2.5**	**19.6**	**211.1**	**17.3%**

Table 7 - Convenience goods spend (£m) 2027 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2027	**152.6**	**153.7**	**194.5**	**46.7**	**38.7**	**42.5**	**44.5**	**59.0**	**74.5**	**80.1**	**79.3**	**250.4**	**1,216.6**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	10.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	**12.9**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.5	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**8.0**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.7	2.8	14.2	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**18.7**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.4	20.6	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**22.8**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.3	30.0	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**33.4**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.7	33.0	21.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.8	**67.2**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.8	6.9	29.1	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	**42.3**	**3.5%**
Waitrose, Banstead (zone 4)	4.2	3.5	2.0	13.2	5.1	1.8	2.7	0.0	0.0	0.0	0.0	0.0	**32.5**	**2.7%**
Asda, Burgh Heath (zone 7)	11.9	0.0	3.4	14.2	9.4	2.6	15.7	0.8	1.0	1.7	0.4	0.0	**60.9**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	5.2	6.8	10.2	0.3	0.0	0.0	**22.8**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	3.0	0.0	0.0	0.0	0.0	0.2	0.4	6.4	6.6	0.0	0.0	0.0	**16.6**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	2.0	0.0	0.0	0.0	0.0	0.5	3.0	20.5	13.8	4.5	0.5	0.0	**44.7**	**3.7%**
M&S Foodhall, Ashtead (zone 8)	1.6	0.0	0.0	0.0	0.0	0.0	0.2	5.4	0.5	0.0	0.0	0.0	**7.7**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.6	0.0	0.0	0.2	0.0	**7.4**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	10.2	0.0	**16.4**	**1.3%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	1.4	24.9	**29.4**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.2	7.6	18.4	**32.2**	**2.6%**
Other main stores in survey area (outside E&E Borough)	6.9	19.5	38.7	6.1	5.0	6.9	7.5	3.3	20.0	21.4	16.0	43.3	**194.8**	**16.0%**
Sub-total, other stores in survey area (B)	*33.8*	*87.2*	*159.8*	*36.6*	*20.4*	*12.1*	*34.7*	*49.9*	*52.5*	*43.4*	*36.4*	*103.9*	***670.7***	***55.1%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	16.9	0.0	0.0	0.7	0.0	0.0	0.0	**18.3**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.7	1.8	6.7	1.6	**18.2**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	5.3	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.5%**
Tesco Extra, Beverley Way, New Malden	3.1	3.8	0.3	0.0	0.0	0.0	0.1	0.0	0.0	7.3	2.9	34.8	**52.4**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	10.9	0.8	**12.0**	**1.0%**
Other main stores outside survey area	11.7	5.9	25.1	2.0	15.3	5.9	3.1	3.5	10.2	18.7	16.5	85.6	**203.4**	**16.7%**
Sub-total, stores outside survey area (C)	*14.8*	*10.0*	*25.4*	*2.1*	*16.1*	*28.0*	*3.2*	*3.8*	*18.7*	*28.0*	*37.1*	*122.9*	***310.1***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**48.6**	**97.2**	**185.2**	**38.7**	**36.5**	**40.1**	**37.9**	**53.7**	**71.2**	**71.4**	**73.5**	**226.8**	**980.9**	***80.6%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.5	0.5	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.5**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	2.1	3.7	1.0	0.4	0.9	1.1	1.5	2.7	1.1	3.3	4.0	**21.7**	**1.8%**
Total for local shops (D)	**1.9**	**2.6**	**3.9**	**1.0**	**0.4**	**0.9**	**1.4**	**1.5**	**2.7**	**1.1**	**3.3**	**4.0**	**24.6**	**2.0%**
Total (A+B+C+D)	**152.6**	**153.7**	**194.5**	**46.7**	**38.7**	**42.5**	**44.5**	**59.0**	**74.5**	**80.1**	**79.3**	**250.4**	**1,216.6**	**100.0%**

Source: Table 3, Table 4

Table 8 - Convenience goods spend (£m) 2032

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2032	**159.9**	**160.3**	**202.5**	**48.7**	**40.4**	**44.1**	**46.2**	**60.6**	**76.4**	**83.2**	**81.7**	**260.5**	**1,264.6**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	10.6	0.3	0.5	0.8	0.1	0.3	0.5	0.8	0.1	0.0	0.1	0.0	**14.1**	**1.1%**
Marks & Spencer, Ashley Centre	3.7	0.0	0.0	0.0	0.2	0.4	1.0	0.3	0.2	0.7	0.2	0.5	**7.3**	**0.6%**
Tesco Express, Epsom Station	0.9	0.6	3.8	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.4%**
Co-Op, Upper High Street	0.7	1.7	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.2%**
Co-Op, Station Approach	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	**1.8**	**0.1%**
Sub-total, Epsom town centre stores	*16.5*	*2.6*	*4.3*	*0.8*	*0.8*	*0.7*	*1.6*	*1.1*	*0.3*	*0.7*	*0.3*	*1.6*	***31.5***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.4	1.7	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**3.8**	**0.3%**
Co-Op, High Street	1.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.2**	**0.2%**
Sub-total, Ewell district centre stores	*2.9*	*2.4*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***6.1***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	9.9	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**11.2**	**0.9%**
Co-Op, Broadway	0.0	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.4**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*16.3*	*0.0*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.9*	***17.5***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	10.8	12.5	1.0	0.8	0.0	0.0	1.1	0.2	0.0	1.1	0.6	14.9	**43.1**	**3.4%**
Co-op, Kingston Road	1.2	2.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	**3.6**	**0.3%**
Sub-total, Kingston Road local centre stores	*12.0*	*14.5*	*1.0*	*0.9*	*0.0*	*0.0*	*1.1*	*0.2*	*0.0*	*1.1*	*0.9*	*14.9*	***46.7***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	4.2	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.1	**6.4**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.8	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.6**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	56.5	17.0	0.0	5.1	1.0	0.8	2.7	2.5	0.3	5.3	1.4	0.9	**93.5**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	5.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.5%**
Tesco Express, Esso PFS, Reigate Road, Epsom	3.1	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.5**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.9	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**5.8**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*68.5*	*19.2*	*0.3*	*5.1*	*1.0*	*0.8*	*2.7*	*2.5*	*0.3*	*5.4*	*1.4*	*1.3*	***108.6***	***8.6%***
Total for Epsom & Ewell Borough (A)	**107.0**	**56.2**	**5.6**	**7.4**	**1.8**	**1.5**	**5.4**	**3.8**	**0.6**	**7.9**	**2.6**	**20.4**	**220.4**	**17.4%**

Table 8 - Convenience goods spend (£m) 2032 - continued

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	Total (%)
Total Available Spend - 2032	**159.9**	**160.3**	**202.5**	**48.7**	**40.4**	**44.1**	**46.2**	**60.6**	**76.4**	**83.2**	**81.7**	**260.5**	**1,264.6**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	10.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	**13.5**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.9	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**8.4**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.7	2.9	14.8	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**19.5**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.4	21.4	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**23.7**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.4	31.2	0.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**34.8**	**2.8%**
Sainsbury's, London Road, North Cheam (zone 3)	1.8	34.4	22.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.2	**70.0**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.8	7.2	30.3	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	**44.1**	**3.5%**
Waitrose, Banstead (zone 4)	4.4	3.7	2.1	13.8	5.3	1.9	2.8	0.0	0.0	0.0	0.0	0.0	**33.9**	**2.7%**
Asda, Burgh Heath (zone 7)	12.4	0.0	3.5	14.8	9.8	2.6	16.3	0.8	1.0	1.7	0.4	0.0	**63.4**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	5.4	7.0	10.5	0.3	0.0	0.0	**23.5**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	3.1	0.0	0.0	0.0	0.0	0.2	0.4	6.6	6.8	0.0	0.0	0.0	**17.1**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	2.1	0.0	0.0	0.0	0.0	0.5	3.1	21.1	14.1	4.7	0.5	0.0	**46.0**	**3.6%**
M&S Foodhall, Ashtead (zone 8)	1.6	0.0	0.0	0.0	0.0	0.0	0.2	5.6	0.5	0.0	0.0	0.0	**7.9**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.5	0.0	0.0	0.0	0.0	0.0	0.1	6.8	0.0	0.0	0.2	0.0	**7.6**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	10.5	0.0	**16.9**	**1.3%**
Sainsbury's, Victoria Road, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	1.4	25.9	**30.6**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.5	7.9	19.1	**33.4**	**2.6%**
Other main stores in survey area (outside E&E Borough)	7.2	20.3	40.4	6.4	5.3	7.2	7.8	3.4	20.5	22.2	16.5	45.0	**202.2**	**16.0%**
Sub-total, other stores in survey area (B)	*35.4*	*91.0*	*166.4*	*38.1*	*21.3*	*12.5*	*36.0*	*51.3*	*53.9*	*45.1*	*37.5*	*108.1*	***696.7***	***55.1%***
Stores outside survey area*														
**stores with a market share >10% from any individual zone*														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	17.5	0.0	0.0	0.7	0.0	0.0	0.0	**19.0**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.9	1.9	6.9	1.7	**18.8**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.6	5.5	0.0	0.0	0.0	0.0	0.0	0.0	**6.0**	**0.5%**
Tesco Extra, Beverley Way, New Malden	3.3	4.0	0.3	0.0	0.0	0.0	0.1	0.0	0.0	7.6	3.0	36.2	**54.5**	**4.3%**
Tesco, Hurst Road, West Molesey	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	11.3	0.9	**12.3**	**1.0%**
Other main stores outside survey area	12.2	6.2	26.1	2.1	16.0	6.1	3.3	3.6	10.5	19.4	17.0	89.0	**211.4**	**16.7%**
Sub-total, stores outside survey area (C)	*15.5*	*10.4*	*26.4*	*2.2*	*16.9*	*29.1*	*3.3*	*3.9*	*19.2*	*29.1*	*38.2*	*127.8*	***322.0***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**51.0**	**101.4**	**192.9**	**40.3**	**38.2**	**41.6**	**39.3**	**55.2**	**73.1**	**74.2**	**75.7**	**235.9**	**1,018.7**	***80.6%***
Local convenience goods														
Local shops & other, Epsom town centre	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0%**
Local shops & other, elsewhere in Epsom & Ewell Borough	1.5	0.6	0.2	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**2.6**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	2.1	3.9	1.0	0.4	0.9	1.1	1.6	2.7	1.1	3.4	4.2	**22.5**	**1.8%**
Total for local shops (D)	**2.0**	**2.7**	**4.0**	**1.0**	**0.4**	**0.9**	**1.5**	**1.6**	**2.7**	**1.1**	**3.4**	**4.2**	**25.6**	**2.0%**
Total (A+B+C+D)	**159.9**	**160.3**	**202.5**	**48.7**	**40.4**	**44.1**	**46.2**	**60.6**	**76.4**	**83.2**	**81.7**	**260.5**	**1,264.6**	**100.0%**

Source: Table 3, Table 4

Table 9 - Trading performance of existing convenience floorspace in Epsom & Ewell Borough (main stores)

	Total net floorspace (sq.m)*	Net Conv Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Average Turnover 2019 (£m)	Est. Actual Turnover 2019 (£m) (Table 5a)	Inflow (%)	Inflow (£m)	Actual t/over including inflow (£m)	ifference from Avg Turnover 2019 (£m)
Epsom town centre										
Waitrose, Ashley Centre	1,318	90%	1,186	13,431	15.9	12.2	5%	0.6	12.873	-3.1
Marks & Spencer, Ashley Centre	954	94%	897	10,965	9.8	6.4	5%	0.3	6.715	-3.1
Tesco Express, Epsom Station	300	95%	285	12,911	3.7	4.8	10%	0.5	5.363	1.7
Co-Op, Upper High Street	179	95%	170	8,269	1.4	2.4	0%	0.0	2.428	1.0
Co-Op, Station Approach	159	95%	151	8,269	1.2	1.6	10%	0.2	1.747	0.5
Sub-total, Epsom town centre stores	2,910	-	2,689	-	32.1	27.4	-	1.7	29.125	-3.0
Ewell district centre										
Sainsbury's Local, Cheam Road	*250*	95%	238	12,191	2.9	3.3	0%	0.0	3.348	0.5
Co-Op, High Street	235	95%	223	8,269	1.8	1.9	0%	0.0	1.943	0.1
Sub-total, Ewell district centre stores	485	-	461	-	4.7	5.3	-	0.0	5.291	0.5
Stoneleigh district centre										
Sainsbury's Local, Broadway	250	95%	238	12,191	2.9	9.8	0%	0.0	9.758	6.9
Co-Op, Broadway	276	95%	262	8,269	2.2	5.6	0%	0.0	5.576	3.4
Sub-total, Stoneleigh district centre stores	526	-	500	-	5.1	15.3	-	0.0	15.334	10.3
Kingston Road local centre										
Aldi, Kingston Road	1,050	80%	840	9,930	8.3	37.7	0%	0.0	37.653	29.3
Co-op, Kingston Road	*300*	87%	262	8,269	2.2	3.2	0%	0.0	3.164	1.0
Sub-total, Kingston Road local centre stores	1,350	-	1,102	-	10.5	40.8	-	0.0	40.818	30.3
Chessington Road (Green Lanes) local centre										
Co-Op, Chessington Road	*250*	95%	238	8,269	2.0	5.6	0%	0.0	5.591	3.6
Ruxley Lane (Gatley Avenue) local centre										
Tesco Express, Ruxley Lane	*300*	95%	285	12,911	3.7	3.1	0%	0.0	3.119	-0.6
Other stores (not within a defined centre)										
Sainsbury's, Kiln Lane, Epsom	5,107	70%	3,575	12,191	43.6	81.3	2%	1.7	82.951	39.4
Co-Op, Ruxley Lane, West Ewell	*300*	95%	285	8,269	2.4	5.0	0%	0.0	4.974	2.6
Tesco Express, Esso PFS, Reigate Road, Epsom	134	95%	127	12,911	1.6	3.0	0%	0.0	3.018	1.4
Tesco Express, Horton Retail Centre, Epsom	200	95%	190	12,911	2.5	5.1	0%	0.0	5.051	2.6
Sub-total, other stores in Epsom & Ewell (excluding local shops)	5,741	-	4,177	-	50.0	94.3	-	1.7	95.993	46.0
Total for Borough	**11,562**		**9,451**	**11,437**	**108.1**	**191.9**		**3.3**	**195.271**	**87.2**

*Note: Net sales area marked with * are approximations*

Table 10 - Commitments for new convenience goods retail floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated convenience A1 floorspace (%)	Estimated convenience A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2019	Estimated turnover 2022	Estimated turnover 2027	Estimated turnover 2032	See note
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	80%	1,142	7,098	8.1	8.2	8.3	8.3	1
Total	**-**	**-**	**-**	**-**	**-**	**-**	**8.1**	**8.2**	**8.3**	**8.3**	

Notes to turnover assumptions

1 - Based on assumed company average sales floorspace split of 80% convenience / 20% comparison

Sales density of 0.7% applied 2019-20, 0.4% 2020-21 and 0.2% per annum applied 2021-25, no sales density growth applied thereafter (source: Experian Retail Planner 16, Figure 4a)

Table 11 - Borough-wide convenience goods floorspace capacity

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	191.9	200.4	211.1	220.4
Existing convenience shop floorspace within Epsom & Ewell Borough (sq.m net)	9,451	9,451	9,451	9,451
Sales per sq.m net £	20,307	11,437	11,505	11,505
Sales from existing floorspace (£m)	191.9	108.1	108.7	108.7
Sales from committed floorspace (£m)	0.0	8.2	8.3	8.3
Residual spending to support new convenience goods floorspace (£m)	0.0	84.1	94.1	103.4
Sales per sq.m net in new shops (£) *Based on large store format*	12,000	12,157	12,279	12,279
Capacity for new floorspace (sq.m net)	**0**	**6,920**	**7,662**	**8,420**
Capacity for new floorspace (sq.m net, rounded)	**0**	**6,900**	**7,700**	**8,400**

Sales density of 0.7% applied 2019-20, 0.4% 2020-21 and 0.2% per annum applied 2021-25, no sales density growth applied thereafter (source: Experian Retail Planner 16, Figure 4a)

Appendix 3

Comparison Goods Need Forecasts

Table 1 - Survey area population forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	*60,784*	*61,958*	*78,034*	*19,056*	*15,653*	*17,212*	*18,189*	*24,738*	*31,570*	*32,419*	*32,893*	*100,776*	***493,282***
2019	62,698	63,779	80,649	19,582	16,081	17,681	18,723	25,329	32,301	33,500	33,854	104,296	**508,473**
2022	65,073	66,003	83,570	20,149	16,611	18,246	19,268	25,798	32,778	34,513	34,616	107,740	**524,365**
2027	68,846	69,322	87,711	21,079	17,453	19,181	20,076	26,588	33,590	36,140	35,785	112,941	**548,712**
2032	72,101	72,253	91,311	21,974	18,235	19,869	20,823	27,335	34,457	37,514	36,831	117,436	**570,139**
Change 2019-32	***9,403***	***8,474***	***10,662***	***2,392***	***2,154***	***2,188***	***2,100***	***2,006***	***2,156***	***4,014***	***2,977***	***13,140***	***61,666***

Source: *Experian Micromarketer (2017-based population forecasts)*

Table 1a - Survey area postcode sectors

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

Table 2 - Survey area per capita expenditure forecasts, comparison goods

	Expenditure per capita (£)	SFT (%) (Experian)	SFT (£)	Expenditure per capita less SFT
2019	4,927	17.9%	882	4,045
2022	5,404	19.7%	1,065	4,340
2027	6,345	21.1%	1,339	5,006
2032	7,427	21.5%	1,597	5,830

Expenditure growth rates: 2019-20: 2.8%, 2020-25: 3.3% per annum, 2026 onwards: 3.2% per annum. 2017 prices.

Source: Experian E-Marketer. Expenditure growth rates and allowance for SFT are sourced from Experian Retail Planner 16 (December 2018).

Table 3 - Survey area retail expenditure, comparison goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
2019	253.60	257.97	326.21	79.20	65.04	71.52	75.73	102.45	130.65	135.50	136.93	421.85	**2,056.65**
2022	282.40	286.43	362.67	87.44	72.09	79.18	83.62	111.96	142.25	149.78	150.22	467.56	**2,275.59**
2027	344.64	347.02	439.07	105.52	87.37	96.02	100.50	133.10	168.15	180.91	179.14	565.37	**2,746.79**
2032	420.35	421.24	532.35	128.11	106.31	115.84	121.40	159.36	200.89	218.71	214.73	684.66	**3,323.94**
Change 2019-32	*166.75*	*163.27*	*206.14*	*48.90*	*41.27*	*44.32*	*45.67*	*56.91*	*70.24*	*83.21*	*77.80*	*262.81*	***1,267.29***

Source: Tables 1 & 2. 2017 prices.

Table 4 - Comparison goods % market share allocation (2019)

Zone Centre/Store	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)
Comparison goods floorspace in Epsom & Ewell Borough												
Town centres												
Epsom town centre (zone 1)	37.29%	14.06%	1.04%	13.89%	5.62%	7.05%	27.68%	21.36%	4.91%	4.61%	2.00%	1.12%
District centres												
Ewell Village (zone 1)	0.86%	1.40%	0.03%	0.00%	0.00%	0.00%	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%
Stoneleigh (Broadway) (zone 2)	0.22%	2.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total	*1.08%*	*3.53%*	*0.03%*	*0.00%*	*0.00%*	*0.00%*	*0.32%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*
Local centres												
All local centres in Epsom & Ewell Borough (zones 1/2)	1.00%	0.84%	0.00%	0.13%	1.40%	0.00%	0.23%	0.00%	0.05%	0.00%	0.00%	0.00%
Out-of-centre												
Kiln Lane retail warehousing, Epsom	2.50%	1.07%	0.00%	0.66%	0.47%	0.96%	0.75%	0.53%	0.32%	0.04%	0.00%	0.00%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	8.52%	1.68%	0.00%	0.87%	0.00%	0.20%	0.71%	0.52%	0.00%	2.12%	0.00%	0.28%
Homebase, Reigate Road, Ewell	2.87%	1.90%	0.04%	0.82%	2.73%	0.15%	1.26%	0.05%	0.06%	0.37%	0.06%	0.00%
Sub-total	*13.89%*	*4.64%*	*0.04%*	*2.36%*	*3.20%*	*1.31%*	*2.72%*	*1.10%*	*0.38%*	*2.54%*	*0.06%*	*0.28%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**53.26%**	**23.06%**	**1.11%**	**16.38%**	**10.22%**	**8.36%**	**30.95%**	**22.47%**	**5.34%**	**7.15%**	**2.06%**	**1.40%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)												
Town centres												
Worcester Park district centre (zone 2)	0.00%	3.97%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.27%
Cheam district centre (zone 2)	0.16%	2.75%	1.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sutton town centre (zone 3)	1.95%	17.61%	45.16%	17.74%	11.27%	0.53%	1.87%	3.93%	0.98%	0.78%	0.00%	6.94%
Banstead town centre (zone 4)	0.49%	0.40%	0.00%	17.82%	6.80%	0.59%	2.09%	0.12%	0.00%	0.00%	0.00%	0.11%
Reigate town centre (zone 5)	0.22%	0.06%	0.14%	1.41%	2.06%	29.16%	1.77%	0.17%	1.52%	0.00%	0.00%	0.11%
Leatherhead town centre (zone 7)	0.34%	0.00%	0.00%	0.59%	0.00%	0.13%	10.81%	12.82%	11.13%	0.00%	0.00%	0.00%
Ashtead village centre (zone 8)	0.20%	0.00%	0.00%	0.09%	0.00%	0.00%	1.22%	12.90%	1.15%	0.00%	0.00%	0.00%
Bookham district centre (zone 9)	0.00%	0.00%	0.30%	0.00%	0.33%	0.00%	0.00%	0.00%	5.58%	0.00%	0.00%	0.00%
Cobham town centre (zone 9)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%	1.62%	5.89%	0.00%	1.45%	0.49%
Esher town centre (zone 11)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%	0.00%	2.02%	3.68%	0.00%
Surbiton town centre (zone 12)	0.00%	0.00%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	4.00%	4.60%	6.19%
Other town centres within survey area (outside Epsom & Ewell Borough)	1.31%	0.80%	0.00%	0.64%	1.96%	2.29%	2.57%	1.87%	2.40%	4.85%	5.25%	0.82%
Out-of-centre / retail warehousing												
B&Q, Sutton Court Road, Sutton (zone 3)	0.45%	1.52%	3.35%	3.33%	1.56%	0.19%	1.06%	0.05%	0.00%	0.00%	0.00%	0.31%
Sainsbury's, London Road, North Cheam (zone 3)	0.00%	2.86%	1.18%	0.16%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.98%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.00%	1.13%	2.66%	0.00%	0.11%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Reigate Road, Burgh Heath (zone 7)	1.49%	0.00%	0.17%	2.76%	6.23%	0.87%	5.88%	0.34%	0.56%	0.32%	0.00%	0.00%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	0.61%	0.00%	0.95%	0.08%	0.38%	3.04%	1.77%	5.83%	5.50%	2.09%	0.30%	0.04%
Sub-total, other comparison goods floorspace in survey area (B)	**7.22%**	**31.10%**	**55.20%**	**44.62%**	**30.71%**	**36.80%**	**29.73%**	**39.76%**	**34.79%**	**14.07%**	**15.27%**	**16.27%**
Comparison goods floorspace outside survey area												
Town centres												
Kingston-upon-Thames town centre	20.36%	24.07%	9.53%	10.93%	7.10%	3.80%	13.43%	16.63%	13.60%	51.98%	54.66%	40.48%
Guildford town centre	1.05%	0.17%	0.00%	1.89%	0.32%	3.34%	5.40%	5.24%	28.32%	1.09%	1.14%	0.55%
Central London / City of London	1.82%	1.21%	0.38%	1.95%	3.21%	1.46%	3.41%	2.06%	0.09%	1.10%	4.26%	1.21%
Croydon town centre	0.35%	0.65%	0.90%	4.11%	7.53%	0.77%	1.08%	0.62%	0.00%	0.00%	0.00%	0.36%
Redhill town centre	0.24%	0.00%	0.00%	0.59%	2.56%	19.07%	0.94%	0.00%	0.16%	0.00%	0.00%	0.00%
Crawley town centre	0.06%	0.00%	0.00%	0.00%	0.75%	5.22%	1.30%	0.00%	0.20%	0.00%	0.65%	0.00%
Out-of-centre / retail warehousing												
Purley Way retail warehousing, Croydon	4.91%	4.61%	16.20%	12.45%	17.74%	4.65%	6.79%	2.79%	3.03%	1.33%	1.22%	4.08%
New Malden retail warehousing	7.38%	8.03%	4.19%	1.75%	0.85%	0.21%	1.04%	2.82%	0.87%	17.71%	7.75%	18.25%
Other	2.91%	5.90%	12.28%	4.86%	17.55%	15.42%	5.88%	7.61%	13.36%	4.45%	12.89%	17.19%
Sub-total, comparison goods floorspace outside survey area (C)	**39.07%**	**44.65%**	**43.49%**	**38.52%**	**57.61%**	**53.94%**	**39.28%**	**37.77%**	**59.64%**	**77.66%**	**82.58%**	**82.12%**
Local / other shops in survey area (D)	**0.45%**	**1.20%**	**0.20%**	**0.48%**	**1.46%**	**0.90%**	**0.04%**	**0.00%**	**0.24%**	**1.12%**	**0.08%**	**0.21%**
Overall total (A+B+C+D)	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research Telephone Survey, August 2019

Table 5a - Comparison goods spend (£m) 2019

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2019	**253.6**	**258.0**	**326.2**	**79.2**	**65.0**	**71.5**	**75.7**	**102.4**	**130.7**	**135.5**	**136.9**	**421.9**	**2,056.7**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	94.6	36.3	3.4	11.0	3.7	5.0	21.0	21.9	6.4	6.2	2.7	4.7	216.9	10.5%
District centres														
Ewell Village (zone 1)	2.2	3.6	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	6.2	0.3%
Stoneleigh (Broadway) (zone 2)	0.6	5.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	0.3%
Sub-total	*2.7*	*9.1*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*12.2*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.5	2.2	0.0	0.1	0.9	0.0	0.2	0.0	0.1	0.0	0.0	0.0	5.9	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	6.3	2.8	0.0	0.5	0.3	0.7	0.6	0.5	0.4	0.1	0.0	0.0	12.2	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	21.6	4.3	0.0	0.7	0.0	0.1	0.5	0.5	0.0	2.9	0.0	1.2	31.9	1.5%
Homebase, Reigate Road, Ewell	7.3	4.9	0.1	0.7	1.8	0.1	1.0	0.1	0.1	0.5	0.1	0.0	16.5	0.8%
Sub-total	*35.2*	*12.0*	*0.1*	*1.9*	*2.1*	*0.9*	*2.1*	*1.1*	*0.5*	*3.4*	*0.1*	*1.2*	*60.6*	*2.9%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**135.1**	**59.5**	**3.6**	**13.0**	**6.6**	**6.0**	**23.4**	**23.0**	**7.0**	**9.7**	**2.8**	**5.9**	**295.6**	**14.4%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	10.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	11.4	0.6%
Cheam district centre (zone 2)	0.4	7.1	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.2	0.5%
Sutton town centre (zone 3)	5.0	45.4	147.3	14.1	7.3	0.4	1.4	4.0	1.3	1.1	0.0	29.3	256.5	12.5%
Banstead town centre (zone 4)	1.2	1.0	0.0	14.1	4.4	0.4	1.6	0.1	0.0	0.0	0.0	0.5	23.4	1.1%
Reigate town centre (zone 5)	0.6	0.1	0.4	1.1	1.3	20.9	1.3	0.2	2.0	0.0	0.0	0.5	28.4	1.4%
Leatherhead town centre (zone 7)	0.9	0.0	0.0	0.5	0.0	0.1	8.2	13.1	14.5	0.0	0.0	0.0	37.3	1.8%
Ashtead village centre (zone 8)	0.5	0.0	0.0	0.1	0.0	0.0	0.9	13.2	1.5	0.0	0.0	0.0	16.2	0.8%
Bookham district centre (zone 9)	0.0	0.0	1.0	0.0	0.2	0.0	0.0	0.0	7.3	0.0	0.0	0.0	8.5	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.7	7.7	0.0	2.0	2.1	13.9	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.7	5.0	0.0	7.9	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.1	5.4	6.3	26.1	38.5	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.3	2.1	0.0	0.5	1.3	1.6	1.9	1.9	3.1	6.6	7.2	3.5	33.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.1	3.9	10.9	2.6	1.0	0.1	0.8	0.1	0.0	0.0	0.0	1.3	22.0	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	7.4	3.8	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1	15.5	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.9	8.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.7	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.8	0.0	0.5	2.2	4.1	0.6	4.5	0.3	0.7	0.4	0.0	0.0	17.2	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.5	0.0	3.1	0.1	0.2	2.2	1.3	6.0	7.2	2.8	0.4	0.2	25.0	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**18.3**	**80.2**	**180.1**	**35.3**	**20.0**	**26.3**	**22.5**	**40.7**	**45.5**	**19.1**	**20.9**	**68.6**	**577.6**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	51.6	62.1	31.1	8.7	4.6	2.7	10.2	17.0	17.8	70.4	74.9	170.8	521.8	25.4%
Guildford town centre	2.7	0.4	0.0	1.5	0.2	2.4	4.1	5.4	37.0	1.5	1.6	2.3	59.1	2.9%
Central London / City of London	4.6	3.1	1.3	1.5	2.1	1.0	2.6	2.1	0.1	1.5	5.8	5.1	30.9	1.5%
Croydon town centre	0.9	1.7	2.9	3.3	4.9	0.5	0.8	0.6	0.0	0.0	0.0	1.5	17.2	0.8%
Redhill town centre	0.6	0.0	0.0	0.5	1.7	13.6	0.7	0.0	0.2	0.0	0.0	0.0	17.3	0.8%
Crawley town centre	0.2	0.0	0.0	0.0	0.5	3.7	1.0	0.0	0.3	0.0	0.9	0.0	6.5	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	12.4	11.9	52.8	9.9	11.5	3.3	5.1	2.9	4.0	1.8	1.7	17.2	134.5	6.5%
New Malden retail warehousing	18.7	20.7	13.7	1.4	0.6	0.1	0.8	2.9	1.1	24.0	10.6	77.0	171.6	8.3%
Other	7.4	15.2	40.1	3.8	11.4	11.0	4.5	7.8	17.5	6.0	17.7	72.5	214.9	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**99.1**	**115.2**	**141.9**	**30.5**	**37.5**	**38.6**	**29.7**	**38.7**	**77.9**	**105.2**	**113.1**	**346.4**	**1,173.8**	**57.1%**
Local / other shops in survey area (D)	1.1	3.1	0.6	0.4	1.0	0.6	0.0	0.0	0.3	1.5	0.1	0.9	9.7	0.5%
Overall total (A+B+C+D)	**253.6**	**258.0**	**326.2**	**79.2**	**65.0**	**71.5**	**75.7**	**102.4**	**130.7**	**135.5**	**136.9**	**421.9**	**2,056.7**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Table 5b - Comparison goods spend (£m) 2022

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2022	**282.4**	**286.4**	**362.7**	**87.4**	**72.1**	**79.2**	**83.6**	**112.0**	**142.2**	**149.8**	**150.2**	**467.6**	**2,275.6**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	105.3	40.3	3.8	12.1	4.1	5.6	23.1	23.9	7.0	6.9	3.0	5.3	240.3	10.6%
District centres														
Ewell Village (zone 1)	2.4	4.0	0.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	6.8	0.3%
Stoneleigh (Broadway) (zone 2)	0.6	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	0.3%
Sub-total	*3.1*	*10.1*	*0.1*	*0.0*	*0.0*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*13.5*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.8	2.4	0.0	0.1	1.0	0.0	0.2	0.0	0.1	0.0	0.0	0.0	6.6	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	7.0	3.1	0.0	0.6	0.3	0.8	0.6	0.6	0.5	0.1	0.0	0.0	13.5	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	24.1	4.8	0.0	0.8	0.0	0.2	0.6	0.6	0.0	3.2	0.0	1.3	35.4	1.6%
Homebase, Reigate Road, Ewell	8.1	5.4	0.2	0.7	2.0	0.1	1.1	0.1	0.1	0.6	0.1	0.0	18.3	0.8%
Sub-total	*39.2*	*13.3*	*0.2*	*2.1*	*2.3*	*1.0*	*2.3*	*1.2*	*0.5*	*3.8*	*0.1*	*1.3*	*67.3*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**150.4**	**66.0**	**4.0**	**14.3**	**7.4**	**6.6**	**25.9**	**25.2**	**7.6**	**10.7**	**3.1**	**6.5**	**327.8**	**14.4%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	11.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	12.6	0.6%
Cheam district centre (zone 2)	0.5	7.9	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.4	0.5%
Sutton town centre (zone 3)	5.5	50.4	163.8	15.5	8.1	0.4	1.6	4.4	1.4	1.2	0.0	32.4	284.7	12.5%
Banstead town centre (zone 4)	1.4	1.2	0.0	15.6	4.9	0.5	1.7	0.1	0.0	0.0	0.0	0.5	25.9	1.1%
Reigate town centre (zone 5)	0.6	0.2	0.5	1.2	1.5	23.1	1.5	0.2	2.2	0.0	0.0	0.5	31.4	1.4%
Leatherhead town centre (zone 7)	0.9	0.0	0.0	0.5	0.0	0.1	9.0	14.3	15.8	0.0	0.0	0.0	40.8	1.8%
Ashtead village centre (zone 8)	0.6	0.0	0.0	0.1	0.0	0.0	1.0	14.4	1.6	0.0	0.0	0.0	17.7	0.8%
Bookham district centre (zone 9)	0.0	0.0	1.1	0.0	0.2	0.0	0.0	0.0	7.9	0.0	0.0	0.0	9.3	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.8	8.4	0.0	2.2	2.3	15.3	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.0	5.5	0.0	8.7	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.1	6.0	6.9	29.0	42.6	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.7	2.3	0.0	0.6	1.4	1.8	2.2	2.1	3.4	7.3	7.9	3.8	36.4	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.3	4.4	12.1	2.9	1.1	0.1	0.9	0.1	0.0	0.0	0.0	1.5	24.4	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	8.2	4.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	17.2	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	3.2	9.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.0	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	4.2	0.0	0.6	2.4	4.5	0.7	4.9	0.4	0.8	0.5	0.0	0.0	19.0	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.7	0.0	3.4	0.1	0.3	2.4	1.5	6.5	7.8	3.1	0.4	0.2	27.5	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**20.4**	**89.1**	**200.2**	**39.0**	**22.1**	**29.1**	**24.9**	**44.5**	**49.5**	**21.1**	**22.9**	**76.1**	**638.9**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	57.5	69.0	34.5	9.6	5.1	3.0	11.2	18.6	19.3	77.9	82.1	189.3	577.1	25.4%
Guildford town centre	3.0	0.5	0.0	1.6	0.2	2.6	4.5	5.9	40.3	1.6	1.7	2.6	64.6	2.8%
Central London / City of London	5.1	3.5	1.4	1.7	2.3	1.2	2.9	2.3	0.1	1.7	6.4	5.6	34.1	1.5%
Croydon town centre	1.0	1.9	3.3	3.6	5.4	0.6	0.9	0.7	0.0	0.0	0.0	1.7	19.0	0.8%
Redhill town centre	0.7	0.0	0.0	0.5	1.8	15.1	0.8	0.0	0.2	0.0	0.0	0.0	19.2	0.8%
Crawley town centre	0.2	0.0	0.0	0.0	0.5	4.1	1.1	0.0	0.3	0.0	1.0	0.0	7.2	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	13.9	13.2	58.8	10.9	12.8	3.7	5.7	3.1	4.3	2.0	1.8	19.1	149.2	6.6%
New Malden retail warehousing	20.8	23.0	15.2	1.5	0.6	0.2	0.9	3.2	1.2	26.5	11.6	85.3	190.1	8.4%
Other	8.2	16.9	44.5	4.2	12.7	12.2	4.9	8.5	19.0	6.7	19.4	80.4	237.6	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**110.3**	**127.9**	**157.7**	**33.7**	**41.5**	**42.7**	**32.8**	**42.3**	**84.8**	**116.3**	**124.1**	**383.9**	**1,298.1**	**57.0%**
Local / other shops in survey area (D)	1.3	3.4	0.7	0.4	1.1	0.7	0.0	0.0	0.3	1.7	0.1	1.0	10.8	0.5%
Overall total (A+B+C+D)	**282.4**	**286.4**	**362.7**	**87.4**	**72.1**	**79.2**	**83.6**	**112.0**	**142.2**	**149.8**	**150.2**	**467.6**	**2,275.6**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Table 5c - Comparison goods spend (£m) 2027

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total* *(%)*
Total Available Spend - 2027	**344.6**	**347.0**	**439.1**	**105.5**	**87.4**	**96.0**	**100.5**	**133.1**	**168.1**	**180.9**	**179.1**	**565.4**	**2,746.8**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	128.5	48.8	4.6	14.7	4.9	6.8	27.8	28.4	8.3	8.3	3.6	6.4	291.0	10.6%
District centres														
Ewell Village (zone 1)	3.0	4.9	0.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	8.3	0.3%
Stoneleigh (Broadway) (zone 2)	0.8	7.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.1	0.3%
Sub-total	*3.7*	*12.2*	*0.1*	*0.0*	*0.0*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*16.4*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	3.4	2.9	0.0	0.1	1.2	0.0	0.2	0.0	0.1	0.0	0.0	0.0	8.0	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	8.6	3.7	0.0	0.7	0.4	0.9	0.8	0.7	0.5	0.1	0.0	0.0	16.4	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	29.4	5.8	0.0	0.9	0.0	0.2	0.7	0.7	0.0	3.8	0.0	1.6	43.1	1.6%
Homebase, Reigate Road, Ewell	9.9	6.6	0.2	0.9	2.4	0.1	1.3	0.1	0.1	0.7	0.1	0.0	22.3	0.8%
Sub-total	*47.9*	*16.1*	*0.2*	*2.5*	*2.8*	*1.3*	*2.7*	*1.5*	*0.6*	*4.6*	*0.1*	*1.6*	*81.8*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**183.5**	**80.0**	**4.9**	**17.3**	**8.9**	**8.0**	**31.1**	**29.9**	**9.0**	**12.9**	**3.7**	**7.9**	**397.2**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	13.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	15.3	0.6%
Cheam district centre (zone 2)	0.6	9.5	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.1	0.5%
Sutton town centre (zone 3)	6.7	61.1	198.3	18.7	9.8	0.5	1.9	5.2	1.6	1.4	0.0	39.2	344.6	12.5%
Banstead town centre (zone 4)	1.7	1.4	0.0	18.8	5.9	0.6	2.1	0.2	0.0	0.0	0.0	0.6	31.3	1.1%
Reigate town centre (zone 5)	0.8	0.2	0.6	1.5	1.8	28.0	1.8	0.2	2.6	0.0	0.0	0.6	38.0	1.4%
Leatherhead town centre (zone 7)	1.2	0.0	0.0	0.6	0.0	0.1	10.9	17.1	18.7	0.0	0.0	0.0	48.5	1.8%
Ashtead village centre (zone 8)	0.7	0.0	0.0	0.1	0.0	0.0	1.2	17.2	1.9	0.0	0.0	0.0	21.1	0.8%
Bookham district centre (zone 9)	0.0	0.0	1.3	0.0	0.3	0.0	0.0	0.0	9.4	0.0	0.0	0.0	11.0	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.7	2.2	9.9	0.0	2.6	2.8	18.1	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.7	6.6	0.0	10.4	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.1	7.2	8.2	35.0	51.3	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	4.5	2.8	0.0	0.7	1.7	2.2	2.6	2.5	4.0	8.8	9.4	4.6	43.8	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.6	5.3	14.7	3.5	1.4	0.2	1.1	0.1	0.0	0.0	0.0	1.8	29.5	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	9.9	5.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	20.8	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	3.9	11.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	15.7	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	5.1	0.0	0.7	2.9	5.4	0.8	5.9	0.4	0.9	0.6	0.0	0.0	22.9	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	2.1	0.0	4.2	0.1	0.3	2.9	1.8	7.8	9.2	3.8	0.5	0.3	32.9	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**24.9**	**107.9**	**242.4**	**47.1**	**26.8**	**35.3**	**29.9**	**52.9**	**58.5**	**25.5**	**27.4**	**92.0**	**770.5**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	70.2	83.5	41.8	11.5	6.2	3.7	13.5	22.1	22.9	94.0	97.9	228.8	696.2	25.3%
Guildford town centre	3.6	0.6	0.0	2.0	0.3	3.2	5.4	7.0	47.6	2.0	2.0	3.1	76.9	2.8%
Central London / City of London	6.3	4.2	1.7	2.1	2.8	1.4	3.4	2.7	0.2	2.0	7.6	6.8	41.2	1.5%
Croydon town centre	1.2	2.3	4.0	4.3	6.6	0.7	1.1	0.8	0.0	0.0	0.0	2.0	23.0	0.8%
Redhill town centre	0.8	0.0	0.0	0.6	2.2	18.3	0.9	0.0	0.3	0.0	0.0	0.0	23.2	0.8%
Crawley town centre	0.2	0.0	0.0	0.0	0.7	5.0	1.3	0.0	0.3	0.0	1.2	0.0	8.7	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	16.9	16.0	71.1	13.1	15.5	4.5	6.8	3.7	5.1	2.4	2.2	23.0	180.4	6.6%
New Malden retail warehousing	25.4	27.9	18.4	1.8	0.7	0.2	1.0	3.8	1.5	32.0	13.9	103.2	229.9	8.4%
Other	10.0	20.5	53.9	5.1	15.3	14.8	5.9	10.1	22.5	8.0	23.1	97.2	286.5	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**134.7**	**154.9**	**190.9**	**40.6**	**50.3**	**51.8**	**39.5**	**50.3**	**100.3**	**140.5**	**147.9**	**464.3**	**1,566.0**	**57.0%**
Local / other shops in survey area (D)	1.5	4.2	0.9	0.5	1.3	0.9	0.0	0.0	0.4	2.0	0.2	1.2	13.0	0.5%
Overall total (A+B+C+D)	**344.6**	**347.0**	**439.1**	**105.5**	**87.4**	**96.0**	**100.5**	**133.1**	**168.1**	**180.9**	**179.1**	**565.4**	**2,746.8**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Table 5d - Comparison goods spend (£m) 2032

Zone Centre/Store	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2032	**420.4**	**421.2**	**532.3**	**128.1**	**106.3**	**115.8**	**121.4**	**159.4**	**200.9**	**218.7**	**214.7**	**684.7**	**3,323.9**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	156.7	59.2	5.5	17.8	6.0	8.2	33.6	34.0	9.9	10.1	4.3	7.7	353.0	10.6%
District centres														
Ewell Village (zone 1)	3.6	5.9	0.2	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	10.1	0.3%
Stoneleigh (Broadway) (zone 2)	0.9	9.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	0.3%
Sub-total	*4.5*	*14.9*	*0.2*	*0.0*	*0.0*	*0.0*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*20.0*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	4.2	3.5	0.0	0.2	1.5	0.0	0.3	0.0	0.1	0.0	0.0	0.0	9.8	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	10.5	4.5	0.0	0.8	0.5	1.1	0.9	0.8	0.6	0.1	0.0	0.0	20.0	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	35.8	7.1	0.0	1.1	0.0	0.2	0.9	0.8	0.0	4.6	0.0	1.9	52.4	1.6%
Homebase, Reigate Road, Ewell	12.1	8.0	0.2	1.1	2.9	0.2	1.5	0.1	0.1	0.8	0.1	0.0	27.1	0.8%
Sub-total	*58.4*	*19.6*	*0.2*	*3.0*	*3.4*	*1.5*	*3.3*	*1.8*	*0.8*	*5.5*	*0.1*	*1.9*	*99.5*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**223.9**	**97.1**	**5.9**	**21.0**	**10.9**	**9.7**	**37.6**	**35.8**	**10.7**	**15.6**	**4.4**	**9.6**	**482.2**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	16.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	18.6	0.6%
Cheam district centre (zone 2)	0.7	11.6	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.3	0.6%
Sutton town centre (zone 3)	8.2	74.2	240.4	22.7	12.0	0.6	2.3	6.3	2.0	1.7	0.0	47.5	417.8	12.6%
Banstead town centre (zone 4)	2.1	1.7	0.0	22.8	7.2	0.7	2.5	0.2	0.0	0.0	0.0	0.8	38.0	1.1%
Reigate town centre (zone 5)	0.9	0.2	0.7	1.8	2.2	33.8	2.1	0.3	3.1	0.0	0.0	0.8	45.9	1.4%
Leatherhead town centre (zone 7)	1.4	0.0	0.0	0.8	0.0	0.2	13.1	20.4	22.4	0.0	0.0	0.0	58.2	1.8%
Ashtead village centre (zone 8)	0.8	0.0	0.0	0.1	0.0	0.0	1.5	20.6	2.3	0.0	0.0	0.0	25.3	0.8%
Bookham district centre (zone 9)	0.0	0.0	1.6	0.0	0.3	0.0	0.0	0.0	11.2	0.0	0.0	0.0	13.2	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.9	2.6	11.8	0.0	3.1	3.4	21.7	0.7%
Esher town centre (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	4.4	7.9	0.0	12.5	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.2	8.7	9.9	42.4	62.1	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	5.5	3.4	0.0	0.8	2.1	2.7	3.1	3.0	4.8	10.6	11.3	5.6	52.8	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.9	6.4	17.8	4.3	1.7	0.2	1.3	0.1	0.0	0.0	0.0	2.1	35.8	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	12.0	6.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	25.2	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	4.8	14.2	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.1	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	6.3	0.0	0.9	3.5	6.6	1.0	7.1	0.5	1.1	0.7	0.0	0.0	27.8	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	2.6	0.0	5.0	0.1	0.4	3.5	2.1	9.3	11.1	4.6	0.6	0.3	39.6	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**30.4**	**131.0**	**293.9**	**57.2**	**32.6**	**42.6**	**36.1**	**63.4**	**69.9**	**30.8**	**32.8**	**111.4**	**932.0**	**28.0%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	85.6	101.4	50.7	14.0	7.6	4.4	16.3	26.5	27.3	113.7	117.4	277.1	842.0	25.3%
Guildford town centre	4.4	0.7	0.0	2.4	0.3	3.9	6.6	8.4	56.9	2.4	2.5	3.8	92.2	2.8%
Central London / City of London	7.6	5.1	2.0	2.5	3.4	1.7	4.1	3.3	0.2	2.4	9.2	8.3	49.8	1.5%
Croydon town centre	1.5	2.7	4.8	5.3	8.0	0.9	1.3	1.0	0.0	0.0	0.0	2.5	27.9	0.8%
Redhill town centre	1.0	0.0	0.0	0.8	2.7	22.1	1.1	0.0	0.3	0.0	0.0	0.0	28.1	0.8%
Crawley town centre	0.3	0.0	0.0	0.0	0.8	6.0	1.6	0.0	0.4	0.0	1.4	0.0	10.5	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	20.6	19.4	86.2	16.0	18.9	5.4	8.2	4.4	6.1	2.9	2.6	27.9	218.7	6.6%
New Malden retail warehousing	31.0	33.8	22.3	2.2	0.9	0.2	1.3	4.5	1.8	38.7	16.6	125.0	278.4	8.4%
Other	12.2	24.9	65.4	6.2	18.7	17.9	7.1	12.1	26.8	9.7	27.7	117.7	346.4	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**164.3**	**188.1**	**231.5**	**49.3**	**61.2**	**62.5**	**47.7**	**60.2**	**119.8**	**169.9**	**177.3**	**562.2**	**1,894.0**	**57.0%**
Local / other shops in survey area (D)	1.9	5.0	1.1	0.6	1.6	1.0	0.1	0.0	0.5	2.4	0.2	1.5	15.8	0.5%
Overall total (A+B+C+D)	**420.4**	**421.2**	**532.3**	**128.1**	**106.3**	**115.8**	**121.4**	**159.4**	**200.9**	**218.7**	**214.7**	**684.7**	**3,323.9**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Table 6 - Schedule of comparison goods floorspace

In-centre floorspace	**Comparison goods floorspace (sq.m net)**
Epsom town centre	
Comparison goods retail units	20,896
Comparison goods floorspace at upper floors	5,737
Non-food floorspace in supermarkets	221
Sub-total for Epsom town centre	*26,854*
Ewell district centre	
Comparison goods retail units	1,530
Non-food floorspace in supermarkets	24
Sub-total for Ewell district centre	*1,554*
Stoneleigh district centre	
Comparison goods retail units	1,710
Non-food floorspace in supermarkets	26
Sub-total for Stoneleigh district centre	*1,736*
Local centres	
Non-food floorspace in supermarkets	276
Total in-centre floorspace	**30,420**
Edge/Out-of-centre floorspace	**Comparison goods floorspace (sq.m net)**
Majestic Wine, East Street, Epsom	223
Wickes, Kiln Lane, Epsom	2,519
Halfords, Kiln Lane, Epsom	743
Sainsbury's, Kiln Lane, Epsom (non-food floorspace, inc. Argos and Habitat concessions)	1,532
Other	32
Total edge/out-of-centre floorspace	**5,049**
Overall total	**35,469**

Source: Experian Goad Category Reports / Goad Plans.

Table 7 - Commitments for new comparison goods floorspace

Scheme name	Application ref	Proposed floorspace	Proposed floorspace (sq.m net)	Estimated comparison A1 floorspace (%)	Estimated comparison A1 floorspace (net sq.m)	Turnover per sq.m	Estimated turnover 2019	Estimated turnover 2022	Estimated turnover 2027	Estimated turnover 2032	See note
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	20%	285	2,500	0.7	0.8	0.9	1.0	1
Total	-	-	-	-	-	-	**0.7**	**0.8**	**0.9**	**1.0**	

Notes to turnover assumptions

1 - Based on assumed company average sales floorspace split of 80% convenience / 20% comparison

Table 8a - Epsom town centre floorspace capacity

	2019	2022	2027	2032
Total Available Expenditure (£m)	2,056.7	2,275.6	2,746.8	3,323.9
Market Share from Survey Area (%)	11	11	11	11
Comparison goods spending in Epsom town centre (£m)	216.9	240.3	291.0	353.0
Total comparison goods spending (£m)	**216.9**	**240.3**	**291.0**	**353.0**
Existing Retail Floorspace (sq.m net)	26,854	26,854	26,854	26,854
Sales per sqm net (£)	8,077	8,689	9,879	11,068
Sales from Existing Floorspace (£m)	216.9	233.3	265.3	297.2
Sales from Committed Floorspace (£m)	0.0	0.8	0.9	1.0
Residual Spending to support new floorspace (£000)	0.0	6.2	24.8	54.8
Sales per sq m net in new shops (£)*	8,000	8,607	9,785	10,963
Capacity for new floorspace (sqm net)	**0**	**719**	**2,532**	**4,995**
Capacity for new floorspace (sq.m net, rounded)	**0**	**700**	**2,500**	**5,000**