

Matter 9:

Retail policies and Epsom Town Centre

12 September 2025

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Susie Legg
Principal Policy Officer
Epsom & Ewell Borough Council
The Old Town Hall
The Parade
Epsom, KT18 5BY

14th August 2025

Dear Susie,

Epsom & Ewell Retail & Commercial Leisure Needs Assessment, 2021

Many thanks for contacting us in respect of the Council's ongoing work preparing the borough's new Local Plan. Having written the Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update (RLNA) (published in September 2021), we understand that the Council require an in-depth review of the report and to issue conclusions as to whether it remains up-to-date, robust and sound given the passage of time. We focus in particular on the following key elements of the study:

- Planning Policy Framework
- National Trends and Legislative Change
- Economic Growth Projections

Planning Policy Framework

The RLNA was prepared in the context of the National Planning Policy Framework (NPPF) July 2021, and the Planning Practice Guidance (PPG), September 2020. The PPG in respect of town centres and retail remains unchanged, but the NPPF was subsequently updated in September 2023, and revised in December 2023 and December 2024.

There are, however, no changes of relevance to retail and town centres, and – consistent with that outlined in the RLNA – the most up-to-date NPPF continues to ensure the vitality of town centres, placing them at the heart of their communities and encouraging a positive approach to their growth, management and adaptation.

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The NPPF also continues to encourage planning policies to seek a series of outcomes relating to the long-term vitality and viability of the hierarchy of town centres, the extent of primary shopping areas and the location of sufficient development opportunity sites. The NPPF states that planning policies should also recognise the benefits of residential development and town centre living in ensuring the vitality of centres; and continues to endorse the sequential and impact test.

The RLNA will be used by the Council to inform the emerging Epsom & Ewell Local Plan, guiding development in the Borough over the plan period. 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 RLNA was prepared within this background context, and these circumstances remain unchanged.

The planning policy framework has not changed. The RLNA Planning Policy Framework remains up-to-date and relevant.

National Trends and Legislative Change

Published in September 2021, the RLNA was commissioned in response to the Covid-19 pandemic and sweeping changes to planning legislation in respect of the Use Classes Order and permitted development rights. These substantial shifts in circumstance had far reaching consequences for our town centres, leading to legislative change and a direct impact on emerging Local Plan policies. The RLNA was prepared within this background context and legislative framework, and the evidence base has taken full account of the consequent impacts of accelerated and ongoing challenges for the high street.

In particular, the RLNA concluded that the role of town centres as a focus for retail remains relevant in today's market to draw in shoppers and footfall, but emphasised that current thinking and research stressed the need to look beyond the role of retail in order to reinvent the high street. The RLNA highlighted that the town centre of the future must add an extra dimension to the retail experience. The RLNA was prepared within this framework of change and evolution, a trend that remains relevant today including the need for dynamic and multi-purpose town centres.

In 2024, the House of Lords Built Environment Committee conducted an inquiry into how high streets could be regenerated and become more resilient and attractive. In November 2024, the committee published its report, 'High Streets: Life beyond retail?'¹, concluding that the dominance of retail on high streets was likely in the past. The report added that whilst shopping would remain a key feature of high street activity, there was now greater demand and opportunities for restaurants and leisure activities, as well as for more public services, such as health centres and libraries, to play a bigger role in town centres. In the committee's view, the evidence presented in the report suggested "that there could be an optimistic and flourishing future for high streets".

Conclusions and recommendations presented in the RLNA respond to the wider national policy approach to drive flexibility in town centres and to deliver diversity and vibrancy. Specific policy recommendations responded to the new Use Class E, permitted development and the potential use of Article 4 Directions. Town centres and commercial markets will continue to evolve, but the RLNA was prepared within an analysis of commercial and consumer markets and planning legislation that remains relevant today. The RLNA conclusions and recommendations remain relevant within the wider national context in respect of retail and leisure floorspace.

¹ <https://lordslibrary.parliament.uk/high-streets-life-beyond-retail-house-of-lords-built-environment-committee/>



Economic Growth Projections

The RLNA forecasts the need for additional retail floorspace to the period 2032, based on the most up-to-date global and national economic trends and forecasts, as published in the Experian Retail Planner Briefing Note October 2020.

The RLNA concludes that the outputs from the previous 2020 evidence base Study had been impacted directly by Covid-19 as a consequence of accelerated trends in the growth of on-line shopping, and strong fluctuations in the efficiency of existing floorspace and its ability to absorb a growing proportion of expenditure. The RLNA concludes that there is no need to plan for additional comparison goods floorspace across the borough over the Local Plan period.

Consistent with the previous 2020 evidence base Study, the RLNA concludes that the extent and quality of centrally located foodstores in the borough is driving high levels of inflow via car-borne trips and substantial turnover and performance levels. This in turn is driving a higher 'need' figure for additional convenience goods floorspace within the borough. Scenario testing considered the needs of just borough residents alongside more sustainable shopping and travel patterns, leading to a much reduced need for additional floorspace (2,200 sq m net by 2027).

The RLNA concluded that this expenditure could – in part – be absorbed by the Sainsbury's at Kiln Lane, rather than being met in newly delivered floorspace. A new Lidl foodstore on the edge of the Primary Shopping Area opened on 12th August 2021, and whilst it was factored in as a commitment in the RLNA, this store will also likely absorb a growing proportion of expenditure as it settles into a more established trading pattern. The RLNA concluded there was no need to plan for additional foodstores/convenience goods floorspace over the plan period.

We have reviewed these findings having regard to the recently approved Aldi foodstore and most up-to-date published economic data.

Experian has subsequently published a revised Retail Planner Briefing Note No.22 (March 2025), responding to the most recent global and national economic trends, and presenting the most likely forecasts in respect of retail growth, sales densities and non-store/on-line shopping. An analysis of the March 2025 publication confirms that the RLNA remains a robust and sound evidence base with which to inform the new Local Plan.

In particular, the newly published data presents only minimal shifts in the rates of on-line shopping, consumer expenditure growth and sales density, all of which have the impact of reducing the RLNA published retail need forecasts:

- The rate of on-line shopping was forecast to reach 6.9% by 2032 for convenience goods, and 27.4% for comparison goods (RLNA 2021); this has fallen marginally to 6.9% and 26.2% respectively (Experian March 2025).
- Forecasts of per capita expenditure for convenience and comparison goods remain constrained and subdued, contributing to falling levels of retail need from that published in the RLNA. For convenience goods, the rates are declining year on year over the plan period through to 2032, whilst for comparison goods the rates are either declining or showing a marginal increase which only gathers pace towards the end of the plan period. The impact is a reduced growth in available expenditure.
- The March 2025 Experian analysis forecasts that sales densities for convenience floorspace will marginally decrease from 0.3% in the RLNA to around 0.1%. For comparison floorspace the sales density is also forecast to decrease, but again only marginally from 2.6%/2.9% to 2.5%. Existing floorspace will therefore absorb a lower proportion of available expenditure.



Whilst this means there will be a greater level of residual expenditure this is not sufficient to outpace the fall in consumer expenditure growth.

On balance, the most up-to-date economic analysis published by Experian has a direct impact on reducing the forecast floorspace need for both convenience and comparison goods. Consistent with the RLNA, there is no need to plan for additional convenience and comparison goods floorspace. The constrained per capita expenditure growth rates are the key drivers reinforcing these conclusions.

For convenience goods, these findings are reinforced further by the recently approved Aldi foodstore (allowed at appeal in April 2025 / Ref: APP/P3610/W/24/3352418). Located outside Epsom Town Centre, in an out-of-centre location, planning permission (ref. 23/00402/FUL) allows the redevelopment of the site to provide a foodstore of 1,552 sq m over two floors of which 1,054 sq m is net sales area, with 66-space customer car park.

Local Plan Period

I understand that since the 2021 study was undertaken, the plan period has changed to 2022-2040. In the wider context of the study, we conclude that it is not necessary to extend the RLNA floorspace need forecasts beyond 2032 at the current time.

The NPPF confirms that ‘the preparation and review of all policies should be underpinned by relevant and up-to-date evidence’. Paragraph 34 goes on to emphasise that:

“Policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years, and should then be updated as necessary. Reviews should be completed no later than five years from the adoption date of a plan, and should take into account changing circumstances affecting the area, or any relevant changes in national policy.”

At present there is nothing to suggest a substantial shift in planning policy, national trends, or commercial markets in the short to medium term, with high streets continuing to experience a series of challenges and opportunities arising from the evolution to more mixed-use destinations. Floorspace need forecasts will remain constrained for the foreseeable future, and the RLNA 10 year forecasts to the period 2032 are sufficiently robust and appropriate when preparing current local plan policies.

The NPPF recommends revisiting local plans and strategies every 5 years to assess whether they need updating, and that should be the case for the Epsom & Ewell Local Plan – particularly in the current challenging economic times and tentative spending patterns. Conclusions and recommendations set out in the RLNA are underpinned by this wider national context and remain relevant to the preparation of the new Local Plan.

Summary

The consideration of ‘change’ following the publication of the RLNA in September 2021 confirms that the evidence base remains robust and relevant in the preparation of the new Local Plan. Policy guidelines have not changed, the study takes into account wider national trends, the new Use Classes Order and up-to-date Planning Legislation, and report outputs respond fully to recent



events – notably, continued economic uncertainty and rising prices in the period following the Covid-19 global health pandemic. We conclude that the RLNA 2021 evidence base remains robust and relevant in the preparation of the new Local Plan.

Yours sincerely

Caroline Marginson
Director



Appendix 1

Convenience Goods Floorspace Need
Economic Update August 2025

Epsom & Ewell Retail & Commercial Leisure Study Update 2021 | Convenience Floorspace Need Including Economic Update August 2025

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
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

Epsom & Ewell Retail & Commercial Leisure Study Update 2021 | Convenience Floorspace Need Including Economic Update August 2025

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	2,489	12.8%	319	2,170
2027	2,318	13.9%	322	1,996
2032	2,286	14.3%	327	1,959

Expenditure growth rates: 2020: 6.8%; 2021: -1.3%; 2022: -5.0%; 2023: -3.5%; 2024: -1.8%; 2025: -0.8%; 2026: -0.6%; 2027-31: -0.3%; 2032: -0.2%.

Source: Experian E-Marketer. Expenditure growth rates are sourced from Experian Retail Planner 18 (October 2020) and Experian Retail Planner 22 (March 2025).

Source: SFT / Internet Sales are sourced from locally calculated rates as identified in the Household Telephone Survey (August 2019)

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Table 3 - Survey area retail expenditure, convenience 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	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	141.21	143.22	181.34	43.72	36.05	39.59	41.81	55.98	71.13	74.89	75.12	233.79	1,137.86
2027	137.42	138.37	175.08	42.07	34.84	38.29	40.07	53.07	67.05	72.14	71.43	225.44	1,095.26
2032	141.25	141.55	178.89	43.05	35.72	38.93	40.79	53.55	67.51	73.49	72.16	230.07	1,116.97
<i>Change 2019-32</i>	3.52	1.45	1.72	0.03	0.40	0.09	-0.33	-2.09	-3.45	-0.10	-2.21	0.96	-0.01

Source: Tables 1 & 2

Epsom & Ewell Retail & Commercial Leisure Study Update 2021 | Convenience Floorspace Need
Including Economic Update August 2025

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

Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Centre/Store	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
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%
<i>Sub-total, Epsom town centre stores</i>	<i>10.3%</i>	<i>1.6%</i>	<i>2.1%</i>	<i>1.7%</i>	<i>1.9%</i>	<i>1.7%</i>	<i>3.4%</i>	<i>1.9%</i>	<i>0.4%</i>	<i>0.8%</i>	<i>0.4%</i>	<i>0.6%</i>
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%
<i>Sub-total, Ewell district centre stores</i>	<i>1.8%</i>	<i>1.5%</i>	<i>0.0%</i>	<i>0.5%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.2%</i>
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%
<i>Sub-total, Stoneleigh district centre stores</i>	<i>0.0%</i>	<i>10.1%</i>	<i>0.0%</i>	<i>0.8%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.3%</i>
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%
<i>Sub-total, Kingston Road local centre stores</i>	<i>7.5%</i>	<i>9.0%</i>	<i>0.5%</i>	<i>1.9%</i>	<i>0.0%</i>	<i>0.1%</i>	<i>2.4%</i>	<i>0.4%</i>	<i>0.0%</i>	<i>1.4%</i>	<i>1.1%</i>	<i>5.7%</i>
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%
<i>Sub-total, other stores in Epsom & Ewell (excluding local shops)</i>	<i>42.8%</i>	<i>12.0%</i>	<i>0.2%</i>	<i>10.4%</i>	<i>2.6%</i>	<i>1.7%</i>	<i>5.9%</i>	<i>4.1%</i>	<i>0.4%</i>	<i>6.4%</i>	<i>1.7%</i>	<i>0.5%</i>
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%

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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, Ashted (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, Ashted (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%
<i>Sub-total, other stores in survey area (B)</i>	<i>22.2%</i>	<i>56.8%</i>	<i>82.2%</i>	<i>78.2%</i>	<i>52.7%</i>	<i>28.4%</i>	<i>78.0%</i>	<i>84.6%</i>	<i>70.5%</i>	<i>54.2%</i>	<i>45.9%</i>	<i>41.5%</i>
Stores outside survey area*												
<i>*stores with a market share >10% from any individual zone</i>												
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%
<i>Sub-total, stores outside survey area (C)</i>	<i>9.7%</i>	<i>6.5%</i>	<i>13.0%</i>	<i>4.5%</i>	<i>41.7%</i>	<i>65.9%</i>	<i>7.2%</i>	<i>6.5%</i>	<i>25.1%</i>	<i>35.0%</i>	<i>46.7%</i>	<i>49.1%</i>
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

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Table 5 - Convenience goods spend (£m) 2019

Zone	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	Total
Centre/Store	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(%)
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%
<i>Sub-total, Epsom town centre stores</i>	<i>14.3</i>	<i>2.3</i>	<i>3.8</i>	<i>0.7</i>	<i>0.7</i>	<i>0.7</i>	<i>1.4</i>	<i>1.0</i>	<i>0.3</i>	<i>0.6</i>	<i>0.3</i>	<i>1.4</i>	<i>27.4</i>	<i>2.5%</i>
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%
<i>Sub-total, Ewell district centre stores</i>	<i>2.5</i>	<i>2.1</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.5</i>	<i>5.3</i>	<i>0.5%</i>
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%
<i>Sub-total, Stoneleigh district centre stores</i>	<i>0.0</i>	<i>14.2</i>	<i>0.0</i>	<i>0.3</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.8</i>	<i>15.3</i>	<i>1.4%</i>
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%
<i>Sub-total, Kingston Road local centre stores</i>	<i>10.3</i>	<i>12.7</i>	<i>0.9</i>	<i>0.8</i>	<i>0.0</i>	<i>0.0</i>	<i>1.0</i>	<i>0.2</i>	<i>0.0</i>	<i>1.0</i>	<i>0.8</i>	<i>13.1</i>	<i>40.8</i>	<i>3.7%</i>
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%
<i>Sub-total, other stores in Epsom & Ewell (excluding local shops)</i>	<i>59.0</i>	<i>16.8</i>	<i>0.3</i>	<i>4.5</i>	<i>0.9</i>	<i>0.7</i>	<i>2.4</i>	<i>2.3</i>	<i>0.3</i>	<i>4.7</i>	<i>1.3</i>	<i>1.2</i>	<i>94.3</i>	<i>8.4%</i>
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%

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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, Ashted (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, Ashted (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%
<i>Sub-total, other stores in survey area (B)</i>	<i>30.5</i>	<i>79.5</i>	<i>145.6</i>	<i>33.7</i>	<i>18.6</i>	<i>11.0</i>	<i>32.1</i>	<i>47.1</i>	<i>50.1</i>	<i>39.9</i>	<i>34.1</i>	<i>95.1</i>	<i>617.2</i>	<i>55.3%</i>
Stores outside survey area*														
<i>*stores with a market share >10% from any individual zone</i>														
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%
<i>Sub-total, stores outside survey area (C)</i>	<i>13.4</i>	<i>9.1</i>	<i>23.1</i>	<i>1.9</i>	<i>14.7</i>	<i>25.6</i>	<i>3.0</i>	<i>3.6</i>	<i>17.8</i>	<i>25.7</i>	<i>34.8</i>	<i>112.4</i>	<i>285.2</i>	<i>25.5%</i>
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

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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	141.2	143.2	181.3	43.7	36.0	39.6	41.8	56.0	71.1	74.9	75.1	233.8	1,137.9	100.0
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.3	0.3	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	12.5	1.1%
Marks & Spencer, Ashley Centre	3.3	0.0	0.0	0.0	0.1	0.4	0.9	0.3	0.2	0.6	0.2	0.5	6.5	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	4.9	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%
<i>Sub-total, Epsom town centre stores</i>	<i>14.6</i>	<i>2.4</i>	<i>3.9</i>	<i>0.7</i>	<i>0.7</i>	<i>0.7</i>	<i>1.4</i>	<i>1.0</i>	<i>0.3</i>	<i>0.6</i>	<i>0.3</i>	<i>1.5</i>	<i>28.0</i>	<i>2.5%</i>
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	3.4	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%
<i>Sub-total, Ewell district centre stores</i>	<i>2.6</i>	<i>2.1</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.5</i>	<i>5.4</i>	<i>0.5%</i>
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.8	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	10.0	0.9%
Co-Op, Broadway	0.0	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	0.5%
<i>Sub-total, Stoneleigh district centre stores</i>	<i>0.0</i>	<i>14.5</i>	<i>0.0</i>	<i>0.3</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.8</i>	<i>15.7</i>	<i>1.4%</i>
Kingston Road local centre														
Aldi, Kingston Road	9.6	11.1	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.4	38.5	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%
<i>Sub-total, Kingston Road local centre stores</i>	<i>10.6</i>	<i>12.9</i>	<i>0.9</i>	<i>0.8</i>	<i>0.0</i>	<i>0.0</i>	<i>1.0</i>	<i>0.2</i>	<i>0.0</i>	<i>1.0</i>	<i>0.8</i>	<i>13.4</i>	<i>41.7</i>	<i>3.7%</i>
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	5.7	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	3.2	0.3%
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	49.9	15.2	0.0	4.5	0.9	0.7	2.5	2.3	0.3	4.7	1.3	0.8	83.1	7.3%
Co-Op, Ruxley Lane, West Ewell	4.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.4%
Tesco Express, Esso PFS, Reigate Road, Epsom	2.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	3.1	0.3%
Tesco Express, Horton Retail Centre, Epsom	3.4	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	5.2	0.5%
<i>Sub-total, other stores in Epsom & Ewell (excluding local shops)</i>	<i>60.5</i>	<i>17.2</i>	<i>0.3</i>	<i>4.5</i>	<i>0.9</i>	<i>0.7</i>	<i>2.5</i>	<i>2.3</i>	<i>0.3</i>	<i>4.8</i>	<i>1.3</i>	<i>1.2</i>	<i>96.5</i>	<i>8.5%</i>
Total for Epsom & Ewell Borough (A)	94.5	50.2	5.1	6.6	1.6	1.4	4.9	3.5	0.6	7.1	2.4	18.3	196.2	17.2%

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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	141.2	143.2	181.3	43.7	36.0	39.6	41.8	56.0	71.1	74.9	75.1	233.8	1,137.9	100.0
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	12.0	1.1%
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	7.5	0.7%
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.6	13.2	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	17.5	1.5%
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	19.2	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.2	1.9%
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.9	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	31.2	2.7%
Sainsbury's, London Road, North Cheam (zone 3)	1.6	30.7	20.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	62.6	5.5%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.4	27.2	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	39.5	3.5%
Waitrose, Banstead (zone 4)	3.8	3.3	1.9	12.4	4.8	1.7	2.5	0.0	0.0	0.0	0.0	0.0	30.4	2.7%
Asda, Burgh Heath (zone 7)	11.0	0.0	3.2	13.2	8.8	2.4	14.7	0.7	0.9	1.6	0.4	0.0	56.9	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	9.8	0.3	0.0	0.0	21.7	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	15.7	1.4%
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.8	19.5	13.1	4.2	0.5	0.0	42.4	3.7%
M&S Foodhall, Ashted (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, Ashted (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.3	0.0	0.0	0.2	0.0	7.0	0.6%
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7	9.7	0.0	15.4	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	23.2	27.5	2.4%
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	7.2	17.1	30.2	2.7%
Other main stores in survey area (outside E&E Borough)	6.4	18.1	36.1	5.7	4.7	6.5	7.1	3.2	19.1	20.0	15.2	40.4	182.4	16.0%
<i>Sub-total, other stores in survey area (B)</i>	<i>31.3</i>	<i>81.3</i>	<i>149.0</i>	<i>34.2</i>	<i>19.0</i>	<i>11.2</i>	<i>32.6</i>	<i>47.4</i>	<i>50.2</i>	<i>40.6</i>	<i>34.5</i>	<i>97.0</i>	<i>628.2</i>	<i>55.2%</i>
Stores outside survey area*														
<i>*stores with a market share >10% from any individual zone</i>														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.7	0.0	0.0	0.7	0.0	0.0	0.0	17.0	1.5%
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.4	1.7	6.3	1.5	17.3	1.5%
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.9	0.0	0.0	0.0	0.0	0.0	0.0	5.4	0.5%
Tesco Extra, Beverley Way, New Malden	2.9	3.6	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.9	2.8	32.5	49.0	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	10.3	0.8	11.3	1.0%
Other main stores outside survey area	10.8	5.5	23.4	1.9	14.2	5.5	2.9	3.3	9.8	17.4	15.7	79.9	190.3	16.7%
<i>Sub-total, stores outside survey area (C)</i>	<i>13.7</i>	<i>9.3</i>	<i>23.7</i>	<i>2.0</i>	<i>15.0</i>	<i>26.1</i>	<i>3.0</i>	<i>3.6</i>	<i>17.8</i>	<i>26.2</i>	<i>35.1</i>	<i>114.7</i>	<i>290.3</i>	<i>25.5%</i>
Total for stores outside Borough & survey area (B+C)	45.0	90.6	172.7	36.2	34.0	37.4	35.6	51.0	68.0	66.8	69.6	211.7	918.5	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	2.3	0.2%
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	1.9	3.5	0.9	0.4	0.9	1.0	1.4	2.6	1.0	3.1	3.7	20.4	1.8%
Total for local shops (D)	1.7	2.4	3.6	0.9	0.4	0.9	1.3	1.4	2.6	1.0	3.1	3.7	23.1	2.0%
Total (A+B+C+D)	141.2	143.2	181.3	43.7	36.0	39.6	41.8	56.0	71.1	74.9	75.1	233.8	1,137.9	100.0%

Source: Table 3, Table 4

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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	137.4	138.4	175.1	42.1	34.8	38.3	40.1	53.1	67.0	72.1	71.4	225.4	1,095.3	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	12.1	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	6.3	0.6%
Tesco Express, Epsom Station	0.8	0.5	3.3	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	0.9	1.6	0.1%
<i>Sub-total, Epsom town centre stores</i>	<i>14.2</i>	<i>2.3</i>	<i>3.7</i>	<i>0.7</i>	<i>0.7</i>	<i>0.6</i>	<i>1.4</i>	<i>1.0</i>	<i>0.3</i>	<i>0.6</i>	<i>0.3</i>	<i>1.4</i>	<i>27.1</i>	<i>2.5%</i>
Ewell district centre														
Sainsbury's Local, Cheam Road	1.2	1.4	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%
<i>Sub-total, Ewell district centre stores</i>	<i>2.5</i>	<i>2.1</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.5</i>	<i>5.2</i>	<i>0.5%</i>
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.5	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	9.6	0.9%
Co-Op, Broadway	0.0	5.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	0.5%
<i>Sub-total, Stoneleigh district centre stores</i>	<i>0.0</i>	<i>14.0</i>	<i>0.0</i>	<i>0.3</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.8</i>	<i>15.1</i>	<i>1.4%</i>
Kingston Road local centre														
Aldi, Kingston Road	9.3	10.8	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	12.9	37.2	3.4%
Co-op, Kingston Road	1.0	1.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	3.1	0.3%
<i>Sub-total, Kingston Road local centre stores</i>	<i>10.3</i>	<i>12.5</i>	<i>0.9</i>	<i>0.8</i>	<i>0.0</i>	<i>0.0</i>	<i>1.0</i>	<i>0.2</i>	<i>0.0</i>	<i>1.0</i>	<i>0.8</i>	<i>12.9</i>	<i>40.3</i>	<i>3.7%</i>
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	0.9	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	48.6	14.7	0.0	4.4	0.9	0.7	2.4	2.2	0.3	4.6	1.2	0.8	80.5	7.4%
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	0.5%
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	5.0	0.5%
<i>Sub-total, other stores in Epsom & Ewell (excluding local shops)</i>	<i>58.9</i>	<i>16.6</i>	<i>0.3</i>	<i>4.4</i>	<i>0.9</i>	<i>0.7</i>	<i>2.4</i>	<i>2.2</i>	<i>0.3</i>	<i>4.6</i>	<i>1.2</i>	<i>1.2</i>	<i>93.5</i>	<i>8.5%</i>
Total for Epsom & Ewell Borough (A)	91.9	48.5	4.9	6.4	1.6	1.3	4.7	3.4	0.5	6.9	2.3	17.7	190.0	17.3%

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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	137.4	138.4	175.1	42.1	34.8	38.3	40.1	53.1	67.0	72.1	71.4	225.4	1,095.3	100.0
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	11.6	1.1%
Sainsbury's Local, Worcester Park (zone 2)	0.0	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	7.2	0.7%
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.5	12.8	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	16.9	1.5%
Morrisons, High Street, Sutton (zone 3)	0.0	1.2	18.5	0.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.5	1.9%
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.0	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.1	2.7%
Sainsbury's, London Road, North Cheam (zone 3)	1.5	29.7	19.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.7	60.5	5.5%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.2	26.2	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	38.1	3.5%
Waitrose, Banstead (zone 4)	3.7	3.2	1.8	11.9	4.6	1.6	2.4	0.0	0.0	0.0	0.0	0.0	29.3	2.7%
Asda, Burgh Heath (zone 7)	10.7	0.0	3.1	12.7	8.5	2.3	14.1	0.7	0.9	1.5	0.4	0.0	54.8	5.0%
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.6	6.1	9.2	0.3	0.0	0.0	20.5	1.9%
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	5.8	6.0	0.0	0.0	0.0	14.9	1.4%
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	18.5	12.4	4.1	0.4	0.0	40.2	3.7%
M&S Foodhall, Ashted (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	4.9	0.4	0.0	0.0	0.0	6.9	0.6%
Tesco Express, Ashted (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.0	0.0	0.0	0.2	0.0	6.6	0.6%
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	9.2	0.0	14.7	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	2.8	1.3	22.4	26.5	2.4%
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	6.9	16.5	29.0	2.6%
Other main stores in survey area (outside E&E Borough)	6.2	17.5	34.9	5.5	4.5	6.3	6.8	3.0	18.0	19.3	14.4	39.0	175.3	16.0%
<i>Sub-total, other stores in survey area (B)</i>	<i>30.4</i>	<i>78.5</i>	<i>143.9</i>	<i>32.9</i>	<i>18.4</i>	<i>10.9</i>	<i>31.2</i>	<i>44.9</i>	<i>47.3</i>	<i>39.1</i>	<i>32.8</i>	<i>93.5</i>	<i>603.8</i>	<i>55.1%</i>
Stores outside survey area*														
<i>*stores with a market share >10% from any individual zone</i>														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.2	0.0	0.0	0.6	0.0	0.0	0.0	16.5	1.5%
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.0	1.7	6.0	1.5	16.4	1.5%
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	4.7	0.0	0.0	0.0	0.0	0.0	0.0	5.2	0.5%
Tesco Extra, Beverley Way, New Malden	2.8	3.4	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.6	2.6	31.4	47.2	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	9.8	0.8	10.8	1.0%
Other main stores outside survey area	10.5	5.3	22.6	1.8	13.8	5.3	2.8	3.2	9.2	16.8	14.9	77.0	183.1	16.7%
<i>Sub-total, stores outside survey area (C)</i>	<i>13.3</i>	<i>9.0</i>	<i>22.8</i>	<i>1.9</i>	<i>14.5</i>	<i>25.2</i>	<i>2.9</i>	<i>3.5</i>	<i>16.8</i>	<i>25.2</i>	<i>33.4</i>	<i>110.6</i>	<i>279.2</i>	<i>25.5%</i>
Total for stores outside Borough & survey area (B+C)	43.8	87.5	166.7	34.8	32.9	36.1	34.1	48.3	64.1	64.3	66.2	204.2	883.1	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	1.3	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	3.3	0.9	0.4	0.8	1.0	1.4	2.4	1.0	3.0	3.6	19.5	1.8%
Total for local shops (D)	1.7	2.3	3.5	0.9	0.4	0.8	1.3	1.4	2.4	1.0	3.0	3.6	22.2	2.0%
Total (A+B+C+D)	137.4	138.4	175.1	42.1	34.8	38.3	40.1	53.1	67.0	72.1	71.4	225.4	1,095.3	100.0%

Source: Table 3, Table 4

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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	141.3	141.6	178.9	43.0	35.7	38.9	40.8	53.6	67.5	73.5	72.2	230.1	1,117.0	100.0
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.3	0.2	0.4	0.7	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	12.4	1.1%
Marks & Spencer, Ashley Centre	3.3	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	4.9	0.4%
Co-Op, Upper High Street	0.6	1.5	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%
<i>Sub-total, Epsom town centre stores</i>	<i>14.6</i>	<i>2.3</i>	<i>3.8</i>	<i>0.7</i>	<i>0.7</i>	<i>0.7</i>	<i>1.4</i>	<i>1.0</i>	<i>0.3</i>	<i>0.6</i>	<i>0.3</i>	<i>1.4</i>	<i>27.8</i>	<i>2.5%</i>
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	3.4	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%
<i>Sub-total, Ewell district centre stores</i>	<i>2.6</i>	<i>2.1</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.5</i>	<i>5.4</i>	<i>0.5%</i>
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	8.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	9.9	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%
<i>Sub-total, Stoneleigh district centre stores</i>	<i>0.0</i>	<i>14.4</i>	<i>0.0</i>	<i>0.3</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.8</i>	<i>15.5</i>	<i>1.4%</i>
Kingston Road local centre														
Aldi, Kingston Road	9.6	11.0	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.5	13.2	38.0	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%
<i>Sub-total, Kingston Road local centre stores</i>	<i>10.6</i>	<i>12.8</i>	<i>0.9</i>	<i>0.8</i>	<i>0.0</i>	<i>0.0</i>	<i>1.0</i>	<i>0.2</i>	<i>0.0</i>	<i>1.0</i>	<i>0.8</i>	<i>13.2</i>	<i>41.2</i>	<i>3.7%</i>
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.7	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	5.7	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	3.2	0.3%
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	49.9	15.0	0.0	4.5	0.9	0.7	2.4	2.2	0.3	4.6	1.3	0.8	82.5	7.4%
Co-Op, Ruxley Lane, West Ewell	4.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.5%
Tesco Express, Esso PFS, Reigate Road, Epsom	2.7	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	3.1	0.3%
Tesco Express, Horton Retail Centre, Epsom	3.4	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	5.2	0.5%
<i>Sub-total, other stores in Epsom & Ewell (excluding local shops)</i>	<i>60.5</i>	<i>17.0</i>	<i>0.3</i>	<i>4.5</i>	<i>0.9</i>	<i>0.7</i>	<i>2.4</i>	<i>2.2</i>	<i>0.3</i>	<i>4.7</i>	<i>1.3</i>	<i>1.2</i>	<i>95.9</i>	<i>8.6%</i>
Total for Epsom & Ewell Borough (A)	94.5	49.6	5.0	6.5	1.6	1.4	4.8	3.4	0.5	7.0	2.3	18.0	194.7	17.4%

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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	141.3	141.6	178.9	43.0	35.7	38.9	40.8	53.6	67.5	73.5	72.2	230.1	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	9.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	11.9	1.1%
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	7.4	0.7%
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.6	13.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	17.2	1.5%
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	18.9	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	21.0	1.9%
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.1	27.6	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	30.8	2.8%
Sainsbury's, London Road, North Cheam (zone 3)	1.6	30.4	19.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.9	61.8	5.5%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.4	26.8	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	39.0	3.5%
Waitrose, Banstead (zone 4)	3.8	3.3	1.9	12.2	4.7	1.7	2.5	0.0	0.0	0.0	0.0	0.0	30.0	2.7%
Asda, Burgh Heath (zone 7)	11.0	0.0	3.1	13.0	8.7	2.3	14.4	0.7	0.9	1.5	0.4	0.0	56.0	5.0%
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	4.7	6.2	9.3	0.3	0.0	0.0	20.7	1.9%
Lidl, North Street, Leatherhead (zone 8)	2.7	0.0	0.0	0.0	0.0	0.2	0.4	5.8	6.0	0.0	0.0	0.0	15.1	1.4%
Tesco, Oxshott Road, Leatherhead (zone 8)	1.8	0.0	0.0	0.0	0.0	0.4	2.7	18.7	12.5	4.1	0.5	0.0	40.7	3.6%
M&S Foodhall, Ashted (zone 8)	1.4	0.0	0.0	0.0	0.0	0.0	0.2	4.9	0.4	0.0	0.0	0.0	7.0	0.6%
Tesco Express, Ashted (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.0	0.0	0.0	0.2	0.0	6.7	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	9.3	0.0	14.9	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	2.9	1.3	22.8	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	6.9	16.9	29.5	2.6%
Other main stores in survey area (outside E&E Borough)	6.4	17.9	35.6	5.6	4.7	6.4	6.9	3.0	18.1	19.6	14.6	39.8	178.6	16.0%
<i>Sub-total, other stores in survey area (B)</i>	<i>31.3</i>	<i>80.3</i>	<i>147.0</i>	<i>33.7</i>	<i>18.8</i>	<i>11.1</i>	<i>31.8</i>	<i>45.3</i>	<i>47.6</i>	<i>39.8</i>	<i>33.1</i>	<i>95.5</i>	<i>615.3</i>	<i>55.1%</i>
Stores outside survey area*														
<i>*stores with a market share >10% from any individual zone</i>														
Morrisons, Reigate	0.0	0.2	0.0	0.1	0.3	15.5	0.0	0.0	0.6	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	7.0	1.7	6.1	1.5	16.6	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	2.9	3.5	0.3	0.0	0.0	0.0	0.1	0.0	0.0	6.7	2.7	32.0	48.2	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	9.9	0.8	10.9	1.0%
Other main stores outside survey area	10.8	5.4	23.0	1.8	14.1	5.4	2.9	3.2	9.3	17.1	15.0	78.6	186.7	16.7%
<i>Sub-total, stores outside survey area (C)</i>	<i>13.7</i>	<i>9.2</i>	<i>23.3</i>	<i>1.9</i>	<i>14.9</i>	<i>25.7</i>	<i>2.9</i>	<i>3.5</i>	<i>16.9</i>	<i>25.7</i>	<i>33.7</i>	<i>112.9</i>	<i>284.4</i>	<i>25.5%</i>
Total for stores outside Borough & survey area (B+C)	45.0	89.5	170.3	35.6	33.7	36.7	34.7	48.8	64.5	65.5	66.9	208.4	899.7	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	1.4	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	2.4	1.0	3.0	3.7	19.9	1.8%
Total for local shops (D)	1.7	2.4	3.6	0.9	0.4	0.8	1.3	1.4	2.4	1.0	3.0	3.7	22.6	2.0%
Total (A+B+C+D)	141.3	141.6	178.9	43.0	35.7	38.9	40.8	53.6	67.5	73.5	72.2	230.1	1,117.0	100.0%

Source: Table 3, Table 4

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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)	Difference from Avg Turnover 2019 (£m)
Epsom town centre							
Waitrose, Ashley Centre	1,318	90%	1,186	13,431	15.9	12.2	-3.7
Marks & Spencer, Ashley Centre	954	94%	897	10,965	9.8	6.4	-3.5
Tesco Express, Epsom Station	300	95%	285	12,911	3.7	4.8	1.1
Co-Op, Upper High Street	179	95%	170	8,269	1.4	2.4	1.0
Co-Op, Station Approach	159	95%	151	8,269	1.2	1.6	0.3
Sub-total, Epsom town centre stores	2,910	-	2,689	-	32.1	27.4	-4.7
Ewell district centre							
Sainsbury's Local, Cheam Road	250	95%	238	12,191	2.9	3.3	0.5
Co-Op, High Street	235	95%	223	8,269	1.8	1.9	0.1
Sub-total, Ewell district centre stores	485	-	461	-	4.7	5.3	0.5
Stoneleigh district centre							
Sainsbury's Local, Broadway	250	95%	238	12,191	2.9	9.8	6.9
Co-Op, Broadway	276	95%	262	8,269	2.2	5.6	3.4
Sub-total, Stoneleigh district centre stores	526	-	500	-	5.1	15.3	10.3
Kingston Road local centre							
Aldi, Kingston Road	1,050	80%	840	9,930	8.3	37.7	29.3
Co-op, Kingston Road	300	87%	262	8,269	2.2	3.2	1.0
Sub-total, Kingston Road local centre stores	1,350	-	1,102	-	10.5	40.8	30.3
Chessington Road (Green Lanes) local centre							
Co-Op, Chessington Road	250	95%	238	8,269	2.0	5.6	3.6
Ruxley Lane (Gatley Avenue) local centre							
Tesco Express, Ruxley Lane	300	95%	285	12,911	3.7	3.1	-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	37.7
Co-Op, Ruxley Lane, West Ewell	300	95%	285	8,269	2.4	5.0	2.6
Tesco Express, Esso PFS, Reigate Road, Epsom	134	95%	127	12,911	1.6	3.0	1.4
Tesco Express, Horton Retail Centre, Epsom	200	95%	190	12,911	2.5	5.1	2.6
Sub-total, other stores in Epsom & Ewell (excluding local shops)	5,741	-	4,177	-	50.0	94.3	44.3
Total for Borough	11,562		9,451	11,437	108.1	191.9	83.8

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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
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	80%	1,142	12,000	13.7	13.8	13.2	13.3

Based on assumed company average sales floorspace split of 80% convenience / 20% comparison
 Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)
 Lidl Sales Density based on performance of a main food convenience/supermarket operator, and reflective of performance of discount operators within this catchment

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Table 11 - Borough-wide convenience goods floorspace capacity - Scenario 1

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	191.9	196.2	190.0	194.7
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	11,556	11,052	11,108
Sales from existing floorspace (£m)	191.9	109.2	104.5	105.0
Sales from committed floorspace (£m)	0.0	13.8	13.2	13.3
Residual spending to support new convenience goods floorspace (£m)	0.0	73.2	72.3	76.4
Sales per sq.m net in new shops (£)	12,000	12,125	11,597	11,655
Capacity for new floorspace (sq.m net)	0	6,036	6,237	6,553
Capacity for new floorspace (sq.m net, rounded)	0	6,000	6,200	6,600

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)

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Table 12 - Borough-wide convenience goods floorspace capacity Scenario 2
[Based on borough spend only supporting new borough floorspace]

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	141.3	144.7	140.5	144.1
Existing convenience shop floorspace within Epsom & Ewell Borough (sq.m net)	9,451	9,451	9,451	9,451
Sales per sq.m net £	14,948	11,556	11,052	11,108
Sales from existing floorspace (£m)	141.3	109.2	104.5	105.0
Sales from committed floorspace (£m)	0.0	13.8	13.2	13.3
Residual spending to support new convenience goods floorspace (£m)	0.0	21.6	22.8	25.9
Sales per sq.m net in new shops (£)	12,000	12,125	11,597	11,655
Capacity for new floorspace (sq.m net)	0	1,784	1,963	2,219
Capacity for new floorspace (sq.m net, rounded)	0	1,800	2,000	2,200

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; -2.4% 2023; -2.3% 2024; 0.1% 2025-2040 (source: Experian Retail Planner 18, October 2020 & Experian Retail Planner March 2025, Figure 3a)



Appendix 2

Comparison Goods Floorspace Need
Economic Update August 2025

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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

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021 | Comparison Floorspace Need Including Economic Update August 2025

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

	Expenditure per capita (£)	SFT (%) (Experian)	SFT (£)	Expenditure per capita less SFT
2019	4,927	32.8%	1,616	3,311
2022	4,989	37.8%	1,886	3,103
2027	4,970	41.1%	2,043	2,927
2032	5,628	42.7%	2,403	3,225

Expenditure growth rates: 2020: -8.3%; 2021: 6.8%; 2022: 3.4%; 2023: -3.2%; 2024: -1.0%; 2025: 0.1%; 2026: 1.3%; 2027-2031: 2.5%; 2031-2032: 2.6% (Experian Retail Planner Briefing Note 22, March 2025)

Source: SFT / Internet Sales are sourced from locally calculated rates as identified in the Household Telephone Survey (August 2019)

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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	207.59	211.17	267.02	64.83	53.24	58.54	61.99	83.86	106.95	110.92	112.09	345.32	1,683.53
2022	201.95	204.83	259.35	62.53	51.55	56.62	59.80	80.06	101.72	107.11	107.43	334.36	1,627.30
2027	201.52	202.91	256.74	61.70	51.09	56.14	58.76	77.83	98.32	105.79	104.75	330.59	1,606.13
2032	232.52	233.01	294.47	70.86	58.81	64.08	67.15	88.15	111.12	120.98	118.78	378.72	1,838.65
Change 2019-32	24.93	21.84	27.45	6.03	5.56	5.54	5.16	4.29	4.17	10.06	6.69	33.40	155.13

Source: Tables 1 & 2

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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%
Ashted 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%

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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	207.6	211.2	267.0	64.8	53.2	58.5	62.0	83.9	106.9	110.9	112.1	345.3	1,683.5	100.0
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	77.4	29.7	2.8	9.0	3.0	4.1	17.2	17.9	5.3	5.1	2.2	3.9	177.5	10.5%
District centres														
Ewell Village (zone 1)	1.8	3.0	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	5.0	0.3%
Stoneleigh (Broadway) (zone 2)	0.5	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
<i>Sub-total</i>	<i>2.2</i>	<i>7.4</i>	<i>0.1</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>10.0</i>	<i>0.6%</i>
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.1	1.8	0.0	0.1	0.7	0.0	0.1	0.0	0.1	0.0	0.0	0.0	4.9	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.2	2.3	0.0	0.4	0.3	0.6	0.5	0.4	0.3	0.0	0.0	0.0	10.0	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.7	3.5	0.0	0.6	0.0	0.1	0.4	0.4	0.0	2.4	0.0	1.0	26.1	1.5%
Homebase, Reigate Road, Ewell	6.0	4.0	0.1	0.5	1.5	0.1	0.8	0.0	0.1	0.4	0.1	0.0	13.5	0.8%
<i>Sub-total</i>	<i>28.8</i>	<i>9.8</i>	<i>0.1</i>	<i>1.5</i>	<i>1.7</i>	<i>0.8</i>	<i>1.7</i>	<i>0.9</i>	<i>0.4</i>	<i>2.8</i>	<i>0.1</i>	<i>1.0</i>	<i>49.6</i>	<i>2.9%</i>
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	110.6	48.7	3.0	10.6	5.4	4.9	19.2	18.8	5.7	7.9	2.3	4.8	242.0	14.4%
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.3	0.6%
Cheam district centre (zone 2)	0.3	5.8	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.5%
Sutton town centre (zone 3)	4.1	37.2	120.6	11.5	6.0	0.3	1.2	3.3	1.0	0.9	0.0	23.9	210.0	12.5%
Banstead town centre (zone 4)	1.0	0.9	0.0	11.6	3.6	0.3	1.3	0.1	0.0	0.0	0.0	0.4	19.2	1.1%
Reigate town centre (zone 5)	0.5	0.1	0.4	0.9	1.1	17.1	1.1	0.1	1.6	0.0	0.0	0.4	23.3	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.7	10.7	11.9	0.0	0.0	0.0	30.5	1.8%
Ashted village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.8	10.8	1.2	0.0	0.0	0.0	13.3	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	6.0	0.0	0.0	0.0	7.0	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.4	6.3	0.0	1.6	1.7	11.4	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	2.2	4.1	0.0	6.5	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.4	5.2	21.4	31.5	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.7	1.7	0.0	0.4	1.0	1.3	1.6	1.6	2.6	5.4	5.9	2.8	27.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.2	8.9	2.2	0.8	0.1	0.7	0.0	0.0	0.0	0.0	1.1	18.0	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	6.0	3.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	12.7	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.4	7.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.6	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.1	0.0	0.4	1.8	3.3	0.5	3.6	0.3	0.6	0.4	0.0	0.0	14.0	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.3	0.0	2.5	0.1	0.2	1.8	1.1	4.9	5.9	2.3	0.3	0.2	20.5	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	15.0	65.7	147.4	28.9	16.3	21.5	18.4	33.3	37.2	15.6	17.1	56.2	472.8	28.1%
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	42.3	50.8	25.4	7.1	3.8	2.2	8.3	13.9	14.5	57.7	61.3	139.8	427.2	25.4%
Guildford town centre	2.2	0.4	0.0	1.2	0.2	2.0	3.3	4.4	30.3	1.2	1.3	1.9	48.3	2.9%
Central London / City of London	3.8	2.6	1.0	1.3	1.7	0.9	2.1	1.7	0.1	1.2	4.8	4.2	25.3	1.5%
Croydon town centre	0.7	1.4	2.4	2.7	4.0	0.4	0.7	0.5	0.0	0.0	0.0	1.2	14.1	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.4	11.2	0.6	0.0	0.2	0.0	0.0	0.0	14.2	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.1	0.8	0.0	0.2	0.0	0.7	0.0	5.3	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	10.2	9.7	43.3	8.1	9.4	2.7	4.2	2.3	3.2	1.5	1.4	14.1	110.1	6.5%
New Malden retail warehousing	15.3	16.9	11.2	1.1	0.5	0.1	0.6	2.4	0.9	19.6	8.7	63.0	140.5	8.3%
Other	6.0	12.5	32.8	3.2	9.3	9.0	3.6	6.4	14.3	4.9	14.5	59.4	175.9	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	81.1	94.3	116.1	25.0	30.7	31.6	24.3	31.7	63.8	86.1	92.6	283.6	960.8	57.1%
Local / other shops in survey area (D)	0.9	2.5	0.5	0.3	0.8	0.5	0.0	0.0	0.3	1.2	0.1	0.7	8.0	0.5%
Overall total (A+B+C+D)	207.6	211.2	267.0	64.8	53.2	58.5	62.0	83.9	106.9	110.9	112.1	345.3	1,683.5	100.0%

Source: Table 3, Table 4

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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	201.9	204.8	259.3	62.5	51.6	56.6	59.8	80.1	101.7	107.1	107.4	334.4	1,627.3	100.0
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	75.3	28.8	2.7	8.7	2.9	4.0	16.6	17.1	5.0	4.9	2.1	3.8	171.8	10.6%
District centres														
Ewell Village (zone 1)	1.7	2.9	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
Stoneleigh (Broadway) (zone 2)	0.4	4.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.3%
<i>Sub-total</i>	<i>2.2</i>	<i>7.2</i>	<i>0.1</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>9.7</i>	<i>0.6%</i>
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.0	1.7	0.0	0.1	0.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	4.7	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.0	2.2	0.0	0.4	0.2	0.5	0.5	0.4	0.3	0.0	0.0	0.0	9.7	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.2	3.4	0.0	0.5	0.0	0.1	0.4	0.4	0.0	2.3	0.0	0.9	25.3	1.6%
Homebase, Reigate Road, Ewell	5.8	3.9	0.1	0.5	1.4	0.1	0.8	0.0	0.1	0.4	0.1	0.0	13.1	0.8%
<i>Sub-total</i>	<i>28.0</i>	<i>9.5</i>	<i>0.1</i>	<i>1.5</i>	<i>1.7</i>	<i>0.7</i>	<i>1.6</i>	<i>0.9</i>	<i>0.4</i>	<i>2.7</i>	<i>0.1</i>	<i>0.9</i>	<i>48.1</i>	<i>3.0%</i>
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	107.5	47.2	2.9	10.2	5.3	4.7	18.5	18.0	5.4	7.7	2.2	4.7	234.4	14.4%
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.0	0.6%
Cheam district centre (zone 2)	0.3	5.6	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.9	0.5%
Sutton town centre (zone 3)	3.9	36.1	117.1	11.1	5.8	0.3	1.1	3.1	1.0	0.8	0.0	23.2	203.6	12.5%
Banstead town centre (zone 4)	1.0	0.8	0.0	11.1	3.5	0.3	1.2	0.1	0.0	0.0	0.0	0.4	18.5	1.1%
Reigate town centre (zone 5)	0.4	0.1	0.4	0.9	1.1	16.5	1.1	0.1	1.5	0.0	0.0	0.4	22.5	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.5	10.3	11.3	0.0	0.0	0.0	29.2	1.8%
Ashted village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.7	10.3	1.2	0.0	0.0	0.0	12.7	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	5.7	0.0	0.0	0.0	6.6	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.3	6.0	0.0	1.6	1.6	10.9	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	2.2	3.9	0.0	6.2	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.3	4.9	20.7	30.4	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.6	1.6	0.0	0.4	1.0	1.3	1.5	1.5	2.4	5.2	5.6	2.7	26.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.1	8.7	2.1	0.8	0.1	0.6	0.0	0.0	0.0	0.0	1.0	17.4	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	5.9	3.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	12.3	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.3	6.9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.0	0.0	0.4	1.7	3.2	0.5	3.5	0.3	0.6	0.3	0.0	0.0	13.6	0.8%
Other Out-of-centre / retail warehousing within survey area (outside Epsom & Ewell Borough)	1.2	0.0	2.5	0.0	0.2	1.7	1.1	4.7	5.6	2.2	0.3	0.1	19.7	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	14.6	63.7	143.2	27.9	15.8	20.8	17.8	31.8	35.4	15.1	16.4	54.4	456.9	28.1%
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	41.1	49.3	24.7	6.8	3.7	2.2	8.0	13.3	13.8	55.7	58.7	135.3	412.7	25.4%
Guildford town centre	2.1	0.4	0.0	1.2	0.2	1.9	3.2	4.2	28.8	1.2	1.2	1.9	46.2	2.8%
Central London / City of London	3.7	2.5	1.0	1.2	1.7	0.8	2.0	1.6	0.1	1.2	4.6	4.0	24.4	1.5%
Croydon town centre	0.7	1.3	2.3	2.6	3.9	0.4	0.6	0.5	0.0	0.0	0.0	1.2	13.6	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.3	10.8	0.6	0.0	0.2	0.0	0.0	0.0	13.7	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.0	0.8	0.0	0.2	0.0	0.7	0.0	5.1	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	9.9	9.4	42.0	7.8	9.1	2.6	4.1	2.2	3.1	1.4	1.3	13.6	106.7	6.6%
New Malden retail warehousing	14.9	16.4	10.9	1.1	0.4	0.1	0.6	2.3	0.9	19.0	8.3	61.0	136.0	8.4%
Other	5.9	12.1	31.8	3.0	9.0	8.7	3.5	6.1	13.6	4.8	13.9	57.5	169.9	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	78.9	91.5	112.8	24.1	29.7	30.5	23.5	30.2	60.7	83.2	88.7	274.6	928.3	57.0%
Local / other shops in survey area (D)	0.9	2.5	0.5	0.3	0.8	0.5	0.0	0.0	0.2	1.2	0.1	0.7	7.7	0.5%
Overall total (A+B+C+D)	201.9	204.8	259.3	62.5	51.6	56.6	59.8	80.1	101.7	107.1	107.4	334.4	1,627.3	100.0%

Source: Table 3, Table 4

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021 | Comparison Floorspace Need
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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	201.5	202.9	256.7	61.7	51.1	56.1	58.8	77.8	98.3	105.8	104.7	330.6	1,606.1	100.0
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	75.1	28.5	2.7	8.6	2.9	4.0	16.3	16.6	4.8	4.9	2.1	3.7	170.1	10.6%
District centres														
Ewell Village (zone 1)	1.7	2.8	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.9	0.3%
Stoneleigh (Broadway) (zone 2)	0.4	4.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.3%
<i>Sub-total</i>	<i>2.2</i>	<i>7.2</i>	<i>0.1</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>9.6</i>	<i>0.6%</i>
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.0	1.7	0.0	0.1	0.7	0.0	0.1	0.0	0.0	0.0	0.0	0.0	4.7	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.0	2.2	0.0	0.4	0.2	0.5	0.4	0.4	0.3	0.0	0.0	0.0	9.6	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	17.2	3.4	0.0	0.5	0.0	0.1	0.4	0.4	0.0	2.2	0.0	0.9	25.2	1.6%
Homebase, Reigate Road, Ewell	5.8	3.8	0.1	0.5	1.4	0.1	0.7	0.0	0.1	0.4	0.1	0.0	13.0	0.8%
<i>Sub-total</i>	<i>28.0</i>	<i>9.4</i>	<i>0.1</i>	<i>1.5</i>	<i>1.6</i>	<i>0.7</i>	<i>1.6</i>	<i>0.9</i>	<i>0.4</i>	<i>2.7</i>	<i>0.1</i>	<i>0.9</i>	<i>47.8</i>	<i>3.0%</i>
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	107.3	46.8	2.9	10.1	5.2	4.7	18.2	17.5	5.2	7.6	2.2	4.6	232.3	14.5%
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	8.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	9.0	0.6%
Cheam district centre (zone 2)	0.3	5.6	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.8	0.5%
Sutton town centre (zone 3)	3.9	35.7	115.9	10.9	5.8	0.3	1.1	3.1	1.0	0.8	0.0	22.9	201.5	12.5%
Banstead town centre (zone 4)	1.0	0.8	0.0	11.0	3.5	0.3	1.2	0.1	0.0	0.0	0.0	0.4	18.3	1.1%
Reigate town centre (zone 5)	0.4	0.1	0.3	0.9	1.1	16.4	1.0	0.1	1.5	0.0	0.0	0.4	22.2	1.4%
Leatherhead town centre (zone 7)	0.7	0.0	0.0	0.4	0.0	0.1	6.4	10.0	10.9	0.0	0.0	0.0	28.4	1.8%
Ashted village centre (zone 8)	0.4	0.0	0.0	0.1	0.0	0.0	0.7	10.0	1.1	0.0	0.0	0.0	12.3	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.8	0.0	0.2	0.0	0.0	0.0	5.5	0.0	0.0	0.0	6.4	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.4	1.3	5.8	0.0	1.5	1.6	10.6	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	2.1	3.9	0.0	6.1	0.4%
Surbiton town centre (zone 12)	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1	4.2	4.8	20.5	30.0	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	2.6	1.6	0.0	0.4	1.0	1.3	1.5	1.5	2.4	5.1	5.5	2.7	25.6	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	0.9	3.1	8.6	2.1	0.8	0.1	0.6	0.0	0.0	0.0	0.0	1.0	17.3	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	5.8	3.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	12.2	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.3	6.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.2	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.0	0.0	0.4	1.7	3.2	0.5	3.5	0.3	0.6	0.3	0.0	0.0	13.4	0.8%
Other out-of-centre / retail warehousing within survey area (outside Epsom & Ewell Borough)	1.2	0.0	2.4	0.0	0.2	1.7	1.0	4.5	5.4	2.2	0.3	0.1	19.3	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	14.6	63.1	141.7	27.5	15.7	20.7	17.5	30.9	34.2	14.9	16.0	53.8	450.5	28.1%
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	41.0	48.8	24.5	6.7	3.6	2.1	7.9	12.9	13.4	55.0	57.3	133.8	407.1	25.3%
Guildford town centre	2.1	0.4	0.0	1.2	0.2	1.9	3.2	4.1	27.8	1.2	1.2	1.8	45.0	2.8%
Central London / City of London	3.7	2.5	1.0	1.2	1.6	0.8	2.0	1.6	0.1	1.2	4.5	4.0	24.1	1.5%
Croydon town centre	0.7	1.3	2.3	2.5	3.8	0.4	0.6	0.5	0.0	0.0	0.0	1.2	13.5	0.8%
Redhill town centre	0.5	0.0	0.0	0.4	1.3	10.7	0.6	0.0	0.2	0.0	0.0	0.0	13.6	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	2.9	0.8	0.0	0.2	0.0	0.7	0.0	5.1	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	9.9	9.4	41.6	7.7	9.1	2.6	4.0	2.2	3.0	1.4	1.3	13.5	105.5	6.6%
New Malden retail warehousing	14.9	16.3	10.8	1.1	0.4	0.1	0.6	2.2	0.9	18.7	8.1	60.3	134.4	8.4%
Other	5.9	12.0	31.5	3.0	9.0	8.7	3.5	5.9	13.1	4.7	13.5	56.8	167.5	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	78.7	90.6	111.7	23.8	29.4	30.3	23.1	29.4	58.6	82.2	86.5	271.5	915.7	57.0%
Local / other shops in survey area (D)	0.9	2.4	0.5	0.3	0.7	0.5	0.0	0.0	0.2	1.2	0.1	0.7	7.6	0.5%
Overall total (A+B+C+D)	201.5	202.9	256.7	61.7	51.1	56.1	58.8	77.8	98.3	105.8	104.7	330.6	1,606.1	100.0%

Source: Table 3, Table 4. 2017 prices.

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021 | Comparison Floorspace Need Including Economic Update August 2025

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	232.5	233.0	294.5	70.9	58.8	64.1	67.2	88.2	111.1	121.0	118.8	378.7	1,838.7	100.0
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	86.7	32.8	3.1	9.8	3.3	4.5	18.6	18.8	5.5	5.6	2.4	4.3	195.3	10.6%
District centres														
Ewell Village (zone 1)	2.0	3.3	0.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	5.6	0.3%
Stoneleigh (Broadway) (zone 2)	0.5	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	0.3%
<i>Sub-total</i>	<i>2.5</i>	<i>8.2</i>	<i>0.1</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.2</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>0.0</i>	<i>11.0</i>	<i>0.6%</i>
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.3	1.9	0.0	0.1	0.8	0.0	0.2	0.0	0.1	0.0	0.0	0.0	5.4	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.8	2.5	0.0	0.5	0.3	0.6	0.5	0.5	0.4	0.1	0.0	0.0	11.0	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	19.8	3.9	0.0	0.6	0.0	0.1	0.5	0.5	0.0	2.6	0.0	1.0	29.0	1.6%
Homebase, Reigate Road, Ewell	6.7	4.4	0.1	0.6	1.6	0.1	0.8	0.0	0.1	0.4	0.1	0.0	15.0	0.8%
<i>Sub-total</i>	<i>32.3</i>	<i>10.8</i>	<i>0.1</i>	<i>1.7</i>	<i>1.9</i>	<i>0.8</i>	<i>1.8</i>	<i>1.0</i>	<i>0.4</i>	<i>3.1</i>	<i>0.1</i>	<i>1.0</i>	<i>55.0</i>	<i>3.0%</i>
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	123.8	53.7	3.3	11.6	6.0	5.4	20.8	19.8	5.9	8.6	2.5	5.3	266.7	14.5%
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	10.3	0.6%
Cheam district centre (zone 2)	0.4	6.4	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.1	0.6%
Sutton town centre (zone 3)	4.5	41.0	133.0	12.6	6.6	0.3	1.3	3.5	1.1	0.9	0.0	26.3	231.1	12.6%
Banstead town centre (zone 4)	1.1	0.9	0.0	12.6	4.0	0.4	1.4	0.1	0.0	0.0	0.0	0.4	21.0	1.1%
Reigate town centre (zone 5)	0.5	0.1	0.4	1.0	1.2	18.7	1.2	0.2	1.7	0.0	0.0	0.4	25.4	1.4%
Leatherhead town centre (zone 7)	0.8	0.0	0.0	0.4	0.0	0.1	7.3	11.3	12.4	0.0	0.0	0.0	32.2	1.8%
Ashted village centre (zone 8)	0.5	0.0	0.0	0.1	0.0	0.0	0.8	11.4	1.3	0.0	0.0	0.0	14.0	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.9	0.0	0.2	0.0	0.0	0.0	6.2	0.0	0.0	0.0	7.3	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.4	6.5	0.0	1.7	1.9	12.0	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	2.4	4.4	0.0	6.9	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	4.8	5.5	23.5	34.3	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.0	1.9	0.0	0.5	1.2	1.5	1.7	1.6	2.7	5.9	6.2	3.1	29.2	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.1	3.5	9.9	2.4	0.9	0.1	0.7	0.0	0.0	0.0	0.0	1.2	19.8	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	6.7	3.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	13.9	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.6	7.8	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.5	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.5	0.0	0.5	2.0	3.7	0.6	3.9	0.3	0.6	0.4	0.0	0.0	15.4	0.8%
Other out-of-centre / retail warehousing within survey area (outside Epsom & Ewell Borough)	1.4	0.0	2.8	0.1	0.2	1.9	1.2	5.1	6.1	2.5	0.4	0.2	21.9	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	16.8	72.5	162.6	31.6	18.1	23.6	20.0	35.1	38.7	17.0	18.1	61.6	515.5	28.0%
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	47.3	56.1	28.1	7.7	4.2	2.4	9.0	14.7	15.1	62.9	64.9	153.3	465.7	25.3%
Guildford town centre	2.5	0.4	0.0	1.3	0.2	2.1	3.6	4.6	31.5	1.3	1.4	2.1	51.0	2.8%
Central London / City of London	4.2	2.8	1.1	1.4	1.9	0.9	2.3	1.8	0.1	1.3	5.1	4.6	27.6	1.5%
Croydon town centre	0.8	1.5	2.7	2.9	4.4	0.5	0.7	0.5	0.0	0.0	0.0	1.4	15.4	0.8%
Redhill town centre	0.6	0.0	0.0	0.4	1.5	12.2	0.6	0.0	0.2	0.0	0.0	0.0	15.5	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.4	3.3	0.9	0.0	0.2	0.0	0.8	0.0	5.8	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	11.4	10.7	47.7	8.8	10.4	3.0	4.6	2.5	3.4	1.6	1.4	15.4	121.0	6.6%
New Malden retail warehousing	17.2	18.7	12.4	1.2	0.5	0.1	0.7	2.5	1.0	21.4	9.2	69.1	154.0	8.4%
Other	6.8	13.8	36.2	3.4	10.3	9.9	3.9	6.7	14.8	5.4	15.3	65.1	191.6	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	90.9	104.0	128.1	27.3	33.9	34.6	26.4	33.3	66.3	94.0	98.1	311.0	1,047.7	57.0%
Local / other shops in survey area (D)														
	1.0	2.8	0.6	0.3	0.9	0.6	0.0	0.0	0.3	1.4	0.1	0.8	8.7	0.5%
Overall total (A+B+C+D)	232.5	233.0	294.5	70.9	58.8	64.1	67.2	88.2	111.1	121.0	118.8	378.7	1,838.7	100.0%

Source: Table 3, Table 4, 2017 prices.

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021
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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
<i>Sub-total for Epsom town centre</i>	<i>26,854</i>
Ewell district centre	
Comparison goods retail units	1,530
Non-food floorspace in supermarkets	24
<i>Sub-total for Ewell district centre</i>	<i>1,554</i>
Stoneleigh district centre	
Comparison goods retail units	1,710
Non-food floorspace in supermarkets	26
<i>Sub-total for Stoneleigh district centre</i>	<i>1,736</i>
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 / Previous Evidence Base

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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
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	20%	285	2,500	0.7	0.7	0.7	0.8
Total	-	-	-	-	-	-	0.7	0.7	0.7	0.8

Notes to turnover assumptions

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

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Table 8a - Epsom town centre floorspace need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	11	11	11	11
Comparison goods spending in Epsom town centre (£m)	177.5	171.8	170.1	195.3
Total comparison goods spending (£m)	177.5	171.8	170.1	195.3
Existing Retail Floorspace (sq.m net)	26,854	26,854	26,854	26,854
Sales per sqm net (£)	6,611	6,377	6,641	7,514
Sales from Existing Floorspace (£m)	177.5	171.3	178.3	201.8
Sales from Committed Floorspace (£m)	0.0	0.7	0.7	0.8
Residual Spending to support new floorspace (£000)	0.0	-0.1	-9.0	-7.4
Sales per sq m net in new shops (£)*	8,000	7,717	7,526	8,515
Capacity for new floorspace (sqm net)	0	-16	-1,190	-865
Capacity for new floorspace (sq.m net, rounded)	0	0	-1,200	-900

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Table 8b - Ewell Village district centre floorspace need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	0.3	0.3	0.3	0.3
Comparison goods spending in Ewell Village district centre (£m)	5.0	4.7	4.9	5.6
Total comparison goods spending (£m)	5.0	4.7	4.9	5.6
Existing Retail Floorspace (sq.m net)	1,554	1,554	1,554	1,554
Sales per sqm net (£)	3,240	3,486	3,963	4,440
Sales from Existing Floorspace (£m)	5.0	5.4	6.2	6.9
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	-0.7	-1.3	-1.3
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-260	-427	-385
Capacity for new floorspace (sq.m net, rounded)	0	-300	-400	-400

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Table 8c - Stoneleigh district centre floorspace capacity

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,627.3	1,606.1	1,838.7
Market Share from Survey Area (%)	0.3	0.3	0.3	0.3
Comparison goods spending in Stoneleigh district centre (£m)	4.9	4.8	4.8	5.5
Total comparison goods spending (£m)	4.9	4.8	4.8	5.5
Existing Retail Floorspace (sq.m net)	1,736	1,736	1,736	1,736
Sales per sqm net (£)	2,849	3,065	3,485	3,904
Sales from Existing Floorspace (£m)	4.9	5.3	6.0	6.8
Sales from Committed Floorspace (£m)	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£000)	0.0	-0.5	-1.3	-1.3
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-194	-423	-383
Capacity for new floorspace (sq.m net, rounded)	0	-200	-400	-400