Retail and Commercial Leisure Needs Assessment Update

Epsom & Ewell Borough Council

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urban shape
PLANNING CONSULTANTS

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1. Introduction

1.1 Urban Shape have been instructed by Epsom & Ewell Borough Council to provide a technical update to the Retail and Commercial Leisure Needs Assessment 2020 ('The 2020 Study' from hereon). The purpose of the 2020 Study was 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, to set out current and future needs for additional floorspace to the period 2032, and to inform the preparation of a robust retail and town centre strategy.

1.2 The 2020 Study was finalised and published one month before the Covid-19 pandemic had far reaching consequences for our town centres. The introduction of 'lockdown' measures and social distancing in March 2020 included the closure of all but essential shops and services. More than a year later, it is widely accepted that town centres will 'bounce back' but that Covid-19 has accelerated the trends and challenges facing our high streets, particularly in respect of operator line-up and composition.

1.3 Over the same period (subsequent to the 2020 Study), the Government have introduced sweeping changes to planning legislation in respect of the Use Classes Order and permitted development, with direct impacts for town centres. In combination with Covid-19, the extent of change over the last 18 months require a far-reaching reconsideration of emerging Local Plan policies. Within this context, we provide an update to the 2020 Study, setting out the impact of change and detailing robust policy recommendations in response. This update should be read alongside the 2020 Study which provides the detailed background and baseline.

1.4 The combined evidence base (2020 Study and 2021 Study Update) 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 evidence base will also remain at the Council's disposal to assist in the determination of planning applications for new development in the Borough.

1.5 The Study Update is structured as follows:

- **Section 2** details relevant changes to planning policy and planning legislation since the 2020 Study;
- **Section 3** provides an update to key market trends in the context of the Covid-19 pandemic;
- **Section 4** identifies any change to the health of the borough's town centres since the 2020 Study;
- **Section 5** sets out our update of retail need forecasts;
- **Section 6** sets out our conclusions and policy recommendations.

2. Policy Context and Planning Legislation

2.1 The 2020 Study provides a detailed analysis of the national and local policy framework relevant to retail and town centre planning in Epsom & Ewell borough. Little has changed in respect of the NPPF and Local Plan, but in recent months there have been sweeping amendments to planning legislation which will have direct and significant implications for emerging development plans and detailed development management policies. This section notes the most recent publication of the NPPF, and outlines the relevant key changes to the Use Classes Order and Permitted Development.

National Planning Policy Framework (July 2021)

2.2 The Government published the new version of the NPPF in July 2021, confirming in a statement that the intention is to 'place greater emphasis on beauty, place-making, the environment, sustainable development and underlines the importance of local design codes'. There are no changes of relevance to retail and town centres, which 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.

2.3 Planning policies are encouraged 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.

2.4 Paragraph 53 and 54 of the newly published NPPF provides new guidance of the use of Article 4 Directions, in the context of newly introduced Permitted Development. Changes to planning legislation, and the reasoning behind these new NPPF paragraphs, is discussed in more detail later in this section, but we quote paragraph 53 and 54 of the NPPF as follows:

> "53. The use of Article 4 directions to remove national permitted development rights should:
>
> - where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)
> - in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)
> - in all cases, be based on robust evidence, and apply to the smallest geographical area possible.
>
> 54. Similarly, planning conditions should not be used to restrict national permitted development rights unless there is clear justification to do so."

2.5 Relevant parts of the Planning Practice Guidance (PPG) also remain unchanged, providing additional detail on applying the sequential and impact test, and emphasising that 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.

Legislative Change: Use Classes Order

2.6 In October 2018, the 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.

2.7 Part 1 of the consultation included 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. The Government proposed 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.

2.8 With the rise of internet shopping, and the change in how people use the high street, the consultation highlighted that it was timely to consider how the operation of the Use Classes Order can support greater flexibility. It noted the need to support the modernisation of the high street and enable businesses to adapt to changes in consumer demands.

2.9 The Government published their response to the consultation in May 2019, which confirmed the intention 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 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."*

2.10 Rather than the far-reaching amendments proposed as part of the consultation paper, and in response to the consultation, the Government announced that it would only amend the A1 (shops) use class to ensure it captured current and future retail models and include clarification on the ability of (A) use classes to diversify and incorporate ancillary uses.

2.11 Shortly afterwards however, as a consequence of the Covid-19 pandemic, the Government decided to go further and introduce more wide-reaching reforms to the Use Classes – without further public consultation. This was a specific and swift response to the economic impact of Coronavirus on high streets and those premises in A1 and A3 in particular. In force from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E. In relation to retail and main town centre uses, the changes are as follows:

- New Class E includes:
  - Shops (former A1)
  - Provision of financial and professional services (former A2)
  - Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
  - Indoor sport, recreation, fitness (gyms) (former D2)
  - Provision of medical or health services (former D1)
  - Creche, day nursery or day centre (former D1)
  - Offices, research and development, light industrial (former B1a, b and c)
- Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses to become defined as Sui Generis.
- Former D2 cinemas, concert halls/live music venues, bingo halls and dance halls to become defined as Sui Generis.

2.12 A series of more protected community uses have been moved into a new Class F, including isolated small shops in rural locations, public halls, the provision of education and libraries.

Legislative Change: Permitted Development

2.13 Following consultation in December 2020, the Government confirmed on 31 March 2021 that a new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) will be introduced under Class MA of the Town and Country Planning (General Permitted Development etc.) (England) Order 2021.

2.14 The government considers that the announced package of measures will help support the creation of much-needed homes while also giving high streets a new lease of life, enabling them to adapt and thrive – 'transforming unused buildings and making the most of brownfield land'.

2.15 The new PD rights, which commenced on 1 August 2021, allow unused commercial buildings – or parts of buildings – to be granted permission for residential use via a fast track prior approval process. Councils are only able to assess prior approval applications on a narrow range of specific considerations including: flooding, noise from commercial premises, adequate light to habitable rooms and impact on a conservation area, for example. The PD rights include the following restrictions:

- a vacancy requirement that will ensure the building changing use has been vacant for a continuous period of 3 months before the date of the application to protect successful businesses in existing use.

- the building must have been in a commercial, business, or service use for at least two continuous years previously.
- a size limit of 1,500 square metres of floorspace applies, to avoid the loss of larger units. The permitted development right does not apply if more 1,500sqm of cumulative floorspace is to be converted. This is significantly more than the 150sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development.

Article 4 Directions

2.16 An article 4 direction is made by the local planning authority. It restricts the scope of permitted development rights either in relation to a particular area or site, or a particular type of development anywhere in the authority's area. Where an article 4 direction is in effect, a planning application may be required for development that would otherwise have been permitted development.

2.17 It is possible to introduce an Article 4 Direction to prevent permitted change of use from Use Class E to residential use. In a statement made by Robert Jenrick, Secretary of State for the Ministry of Housing, Communities and Local Government, on 1st July 2021 it was highlighted that "in very specific circumstances, local authorities can make Article 4 directions to suspend individual permitted development rights, when justified by robust evidence, [but added that it must be] used in a highly targeted way to protect the thriving core of historic high street areas, but does not unnecessarily restrict the ability to deliver much needed housing through national permitted development rights.

2.18 The statement confirmed the introduction of the new paragraph 53 and 54 of the National Planning Policy Framework (see above), and encourages Councils to 'recognise the value to housing supply and increasing resident town centre footfall from supporting 'flats above shops'; for example'. The Government consider this to be important to support mixed and flexible high streets, to deliver additional homes more easily, and to support jobs in the construction industry, while increasing demand for local high street services through new high street homes.

2.19 The statement encourages local authorities by carefully target any proposed Article 4 areas, focusing on the Primary Shopping Area supported by robust evidence to justify the Article 4 direction and the area it covers.

3. Market Context

3.1 Consumer and economic trends in the retail and leisure sector 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.

3.2 Trends in recent years have been well documented. They closely follow 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; the growth of the commercial leisure sector; and changes in the convenience goods sector with the growth of 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.

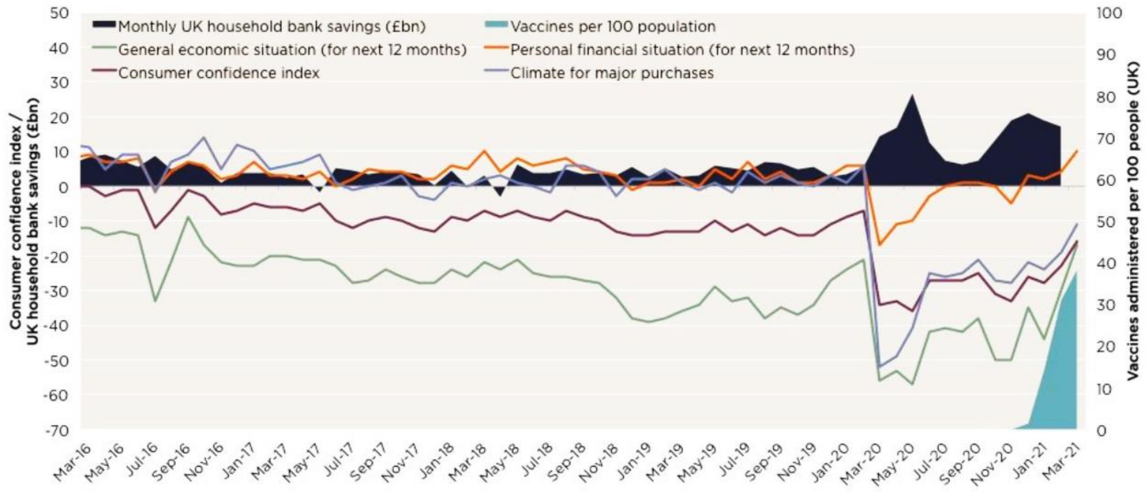
3.3 As highlighted in the introduction, this study was finalised in February 2020 just one month before the Covid-19 pandemic shut high streets across the UK. The longer term impact of Covid-19 on wider society and our town centres is still uncertain, but it is widely accepted that town and city centres will bounce back to varying degrees, and that Covid-19 has accelerated trends and challenges facing our high streets. In this section, we provide an update to those trends identified in the 2020 Study, focusing on the implications of the Covid-19 pandemic.

Covid-19

3.4 On Monday 23rd March 2020 the country introduced 'lockdown' measures and social distancing including the closure of all but essential shops and services. This had an immediate impact on town centres and town centre businesses unable to trade, with doors shut and no timeline in place for re-opening. In the Retail Planner Briefing Note 18, October 2020, Experian state:

> *"the outbreak of coronavirus (Covid-19) and measures to contain it has had a considerable impact on the UK and global economies. During the intensive stage of the lockdown, the economy suffered an unprecedented contraction, employment fell markedly and over 9 million employees were furloughed. Consumer demand suffered given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel.*
>
> *In addition, investment fell markedly, as waning business confidence and deteriorating financial positions led to the postponement and cancellation of projects. Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforce lockdown or social distancing measures to varying degrees. Supply side factors have reinforced this trend, such as the temporary closure of factories and businesses and disruptions to supply chains."*

3.5 In the October 2020 report, Experian forecast a 'near-term', 'central/medium' and 'long term' outlook. This Retail and Leisure Study incorporates forecasts based on the Experian 'central/medium' term outlook, assuming that an effective medical treatment (the vaccine) is in place by around mid-2021, enabling the recovery to regain momentum as confidence recovers. Research by Savills, GfK and Bank of England (below) currently supports this central trend based on the UK's swift vaccine roll-out.



3.6 At the time of writing, the vaccine roll-out is progressing swiftly and smoothly as expected under the 'central/medium' term scenario. As social distancing measures unwind, social consumption is expected to recover; and alongside this, some correction in the share of online spending is assumed, but it will nevertheless remain elevated compared to pre-Covid-19 projections.

3.7 Moving forwards, Experian explain that recovery over the coming years will be shaped by the course of the pandemic, the success of measures to contain it and the extent of potential scarring to the UK's longer term economic potential. The unprecedented nature of these issues means all forecasts will be subject to greater than usual uncertainty, with the following key variables:

- How long social-distancing is in place;
- How successful government measures are in mitigating the economic impact on households and businesses;
- The rebound of household and business confidence levels;
- Global backdrop including trade and supply chain impacts on industry.

3.8 Government finances have deteriorated markedly following exceptional measures taken to support the economy. Over the medium term, fiscal policy will likely be a constraint on growth as corrective measures such as spending cuts or tax rises may be required. It is expected that monetary policy will remain supportive over the medium term, with interest rates expected to remain at exceptionally low levels for the foreseeable future.

Online and Multi-Channel Retailing

3.9 Online spending 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 every day, 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.

3.10 Recent data from the ONS confirms the extent to which online platforms now form part of the population's shopping habits. ONS data in respect of online usage has recently identified that:

- In January to February 2020, 96% of households in Great Britain had internet access, up from 93% in 2019 and 57% in 2006 when comparable records began.
- Over 85% of adults use the Internet every day. Daily internet usage has more than doubled since 2008.
- In January to February 2020, 76% of adults in Great Britain used internet banking, increasing from 30% in 2007 and 73% in 2019.
- 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%.
- In January to February 2020, 87% of all adults shopped online within the last 12 months, up from 53% in 2008; those aged 65 years and over had the highest growth, rising from 16% to 65% over this period.
- In August 2020, 100% of adults in the 16-24 and 25-34 old age group shopped online; and over 96% of 35-54 age group shopped online. By contrast, only 67% of those over 65 years shop online - however this age group has shown the largest increase in online shopping uptake, increasing from 48% in 2018, and 16% in 2008.

3.11 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 identified 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.

3.12 The most popular online 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.

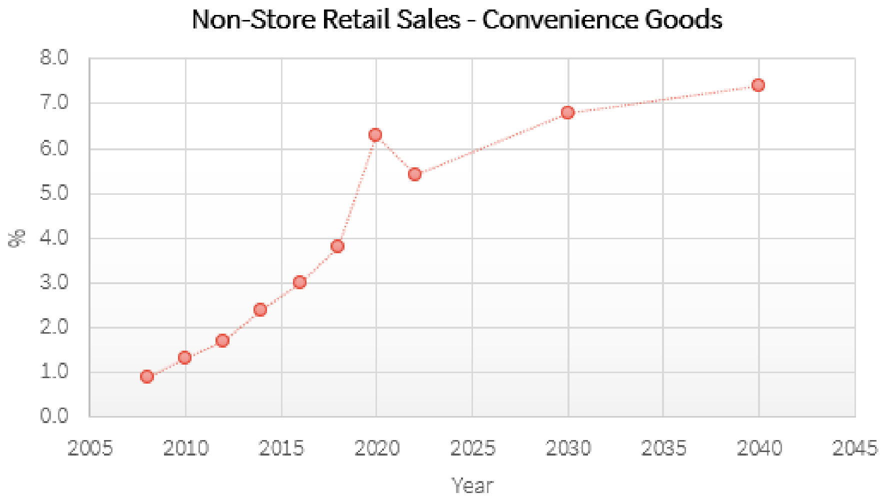
3.13 Importantly for town centres, it has been evidenced that only 15% of online shoppers buy all of their fashion items online, with the remaining 85% using both online and physical stores. This highlights the importance of having a ‘joined-up’ town centre ‘experience’ to lure shoppers away from the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

Covid-19 and Online Spending

3.14 Experian report that there has been a marked increase in online shopping since the Covid-19 crisis broke, which has further accelerated the already strong growth trend seen over the past decade. The rising share of internet sales in total retail transactions is the key trend for SFT. Internet sales share of total retail surpassed 19% in 2019 before lurching up to over 30% in the second quarter of 2020, against less than 5% in 2008.

3.15 With lockdown measures related to Covid-19 relaxing since the second quarter of 2020, the share of internet sales in total retail transactions has eased from its peak (fig.3.1 and 3.2 below). We expect this unwinding to continue in the coming months, however it is anticipated that some of the increase in the internet sales share seen during the pandemic will remain throughout the forecast period. Figure 3.1 and 3.2 below illustrates the small drop from the high peak of growth, but not to pre-Covid-19 levels, and will be followed by continued steady forecast growth.

Figure 3.1: Convenience Goods Internet Sales Growth Trends and Forecasts



2008 – 0.9%
2019 – 4.2%
2020 – 6.3%
2021 – 5.4%
2040 – 7.4%

Figure 3.2: Comparison Goods Internet Sales Growth Trends and Forecasts

2008 – 7.1%
2019 – 17.5%
2020 – 22.9%
2021 – 21.8%
2040 – 28.7%

3.16 The ease of online purchasing has also continued to improve rapidly, with technological advances, particularly around smartphones and connectivity. Faster delivery ties, including same day delivery, and easier returns processes have also encouraged the trend. Beyond 2021, Experian expect the SFT market share to continue to growth strongly in the mid-term, hitting around 30% in 2027; with the pace of growth anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040. This represents an upgrade from that underpinning The 2020 Study ("Table 2" below), which forecast SFT of 21.1% by 2027; compared to the revised uplift of 30%, this is significant.

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).

Source of Table 2: Extract from Appendix 3, The 2020 Study

3.17 The fast expansion in SFT presents a major challenge to store performance. Experian report that the upgraded outlook for on-line sales has resulted in a reduction in the outlook for floorspace demand. That said, there are a number of factors that temper this trend:

- Stores sell online but source goods and products from regular stores, rather than warehouses;
- Even if non-store retailing outpaces store-based shopping as assumed over the next 20 years, store-based shopping is still expected to continue to expand – albeit at a lower rate;
- Click and collect remains an increasingly popular choice with consumers, requiring a bricks and mortar presence in easily accessibly locations;
- A significant development is multi-channelling, where internet shopping actually drives demand for traditional outlets; i.e. customers today expect to be served by a business across a wide range of channels including physical stores. Customers who shop online and in store were found to be worth more to a business; translating to 10% more per visits online and 4% instore, compared to single-channel shoppers.

Grimsey Review

3.18 As detailed in the 2020 Study, the retail and town centre sector was already faced with multi-dimensional challenges. The Covid-19 'Build Back Better' Grimsey Review (June 2020) references statistics published in the months just prior to the pandemic by CBRE, highlighting the stark downturn in the retail property market. The report quotes a 42% fall in retail property investment between 2014 and 2018; a 78% drop in shopping centre investment over the same period; and a 47% drop in the value of retail property assets changing hands between 2017 and 2018. The report adds that there were no new shopping centre openings in 2019, although some were extended, whilst a third of London shopping centres were subject to planning applications for at least some element of conversion to residential use.

3.19 It is predicted that the Covid-19 pandemic will drive a substantial amount of retail property into the hands of insolvency practitioners over the next few months. Nevertheless, the report adds that 'out of the ashes and pandemic rubble will eventually emerge signs of recovery in every town up and down the country'.

4. Health Check Updates

4.1 The 2020 Study sets out detailed health checks of Epsom, Stoneleigh Broadway and Ewell Village, providing comparisons with the previous 2009 evidence base to identify trends and areas of change in respect of composition and mix of uses. We set out below the findings from new town centre audits undertaken in July 2021, providing a monitoring baseline in the context of the new Use Classes Order, and also to understand any short term impacts of the Covid-19 pandemic and wider town centre trends.

Epsom Town Centre: The 2020 Study, Key Findings

4.2 The evidence demonstrated good levels of vitality and viability across the Primary Shopping Area and highlighted specific areas for policy intervention to ensure a continued sound performance moving forwards. The 2020 Study concluded:

> *"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.*

Diversity of Uses/Composition

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

4.4 At the time of the 2020 Study, Epsom had 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 had succeeded in retaining the major key attractors which were considered critical in underpinning Epsom as a town centre of choice; with evidence highlighting that the percentage of national multiples within this category has actually increased by 2% in the last 5 years. It was recommended that policy should aim to halt or reverse the decline of comparison goods operators. It was 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.

4.5 The evidence demonstrated 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 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 had invested in a 'Luxe' upgrade, and Picture House had received planning permission for a new six screen cinema in Epsom Square. These uses will 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.

4.6 Financial and business services were 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 identified a growth in ground floor Use Class B1 and Use Class D2 across each town centre, and it was recommended that the Development Plan should be pro-active in preventing this trend from emerging within the Epsom Town Centre Primary Shopping Area.

4.7 The Use Class A1 threshold of 66% within the Primary Shopping Frontage had 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.

4.8 The analysis concluded 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. It was recommended that 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: Need - 2020

4.9 It was found that Epsom Town Centre had 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.

4.10 The improved level of trade retention was 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.

4.11 When forecasting need, the assessment 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 translated 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. The updated retail need assessment is set out later in this report, in Section 5.

Epsom Town Centre: 2021 Health Check Update

4.12 This study provides an up-to-date analysis of the health of Epsom town centre, drawing on desk based research, detailed on-site surveys (July and September 2021), and data obtained from the Council.

Table 4.1 and 4.2 below compares the town centre composition by number of units since the previous audit undertaken in 2019 and presented in the 2020 Study.

4.13 The up-to-date analysis demonstrates very little change in the composition of Epsom town centre, with a very small reduction in the number of convenience, comparison and financial & business services, and a very small increase in leisure and retail services and vacant units. The largest change has been the increase in leisure services from 68 businesses to 75, closely followed by the increase in retail services from 49 to 52. The number of vacant units remains below the national average, and the composition of the town centre is generally well balanced reflecting wider national trends.

Table 4.1: Epsom Town Centre Composition of Uses (Units) – November 2018 (The 2020 Study)

	No. of units	% of Total	UK Average (%)	Variance
Convenience	21	7%	9%	-2%
Comparison	85	29%	30%	-1%
Leisure Service	68	23%	24%	-1%
Retail Service	49	17%	15%	+2%
Financial & Business Service	39	13%	10%	+3%
Vacant	33	11%	12%	-1%
Total	295	100	100	-

Source: Experian Goad, November 2018

Table 4.2: Epsom Town Centre Composition of Uses (Units) - Update

	No. of units	% of Total	UK Average (%)	Variance
Convenience	20	7%	9%	-2%
Comparison	81	27%	27%	-
Leisure Service	75	25%	25%	-
Retail Service	52	17%	16%	+1%
Financial & Business Service	38	13%	9%	+4%
Vacant	34	11%	14%	-3%
Total	300	100	100	-

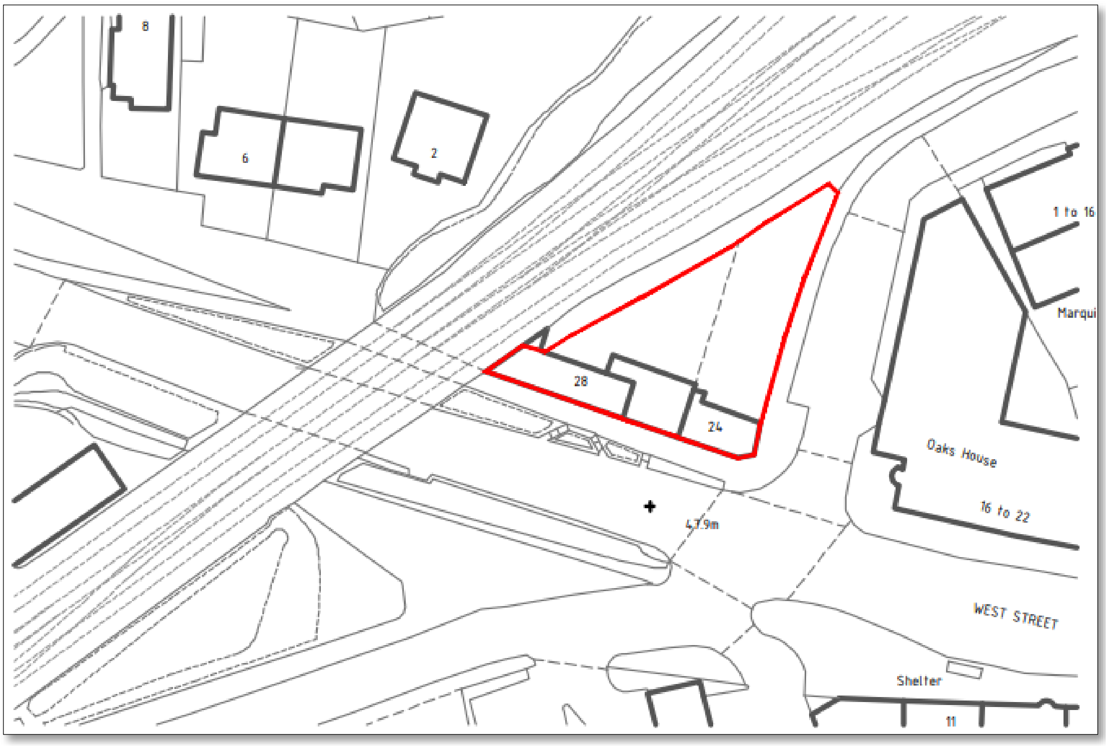
Source: Experian Goad, August 2020

4.14 The number of convenience units have fallen by just one, albeit all main foodstores remain open for trading. These include 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. Following planning permission in March 2018, the new Lidl foodstore on Upper High Street opened in September 2021. Full details are set out in the 2020 Study, but the scheme comprises a 1,427 sq m net foodstore and 30 residential units.

4.15 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, 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. A new butcher – Prestige Butchers – has opened on The High Street, but Gillespie's bakery on West Street is shortly closing, with the site forming part of the wider proposed development block on the junction of West Street and Station Approach. Planning permission (Ref: 19/01021) is sought for:

> *"Demolition of existing building and construction of a new part 7 and part 8 storey building containing ground floor commercial/retail (E use class) and 25 residential units (C3 Use) on upper levels and associated development"*

Figure 4.1: 24-28 West Street, Epsom



4.16 The development site, 24-28 West Street, comprises three units which are now all vacant including Gillespies Bakery (closing down), Leaders Estate Agent and Surrey Cars taxi services (both vacant). Any reoccupation of these units will be dependent on the outcome of the planning application decision.

4.17 Since the last audit in 2019, a small number of key multiple retailers have closed down, including H&M Kids clothing, H&M ladies fashion, Lakeland, Smiggle and make-up shop Kiko – all located within and adjoining the Ashley Shopping Centre. H&M occupied large floorplate units in the Ashley Shopping Centre, with the ladies fashion shop occupying a 2-storey floorplate. The loss of H&M from Epsom town centre weakens the clothing offer and leaves two of the largest floorplate units empty. This should be monitored moving forwards.

4.18 Key anchor multiple retailers still trading include M&S, TK Maxx, Next, Monsoon/Accessories, New Look, House of Fraser, White Stuff, Fat Face, Wilko's, Clarks, Boots, Superdrug, and Jones the Bootmakers. In the Ashley Centre, 'The Fragrance Shop' and 'Therapie Clinic' offering skin treatments, have opened. Experian Goad highlight that the proportion of comparison goods operators in Epsom town centre (27%) is reflective of the national average (27%).

4.19 The 2020 Study highlighted that the representation of national multiple comparison goods retailers had remained strong. It was recorded that in a previous study (2009), multiple retailers in Epsom made up 70% of the comparison shopping offer, and in 2013 this figure was 65% - a small drop. Experian Goad recorded this figure to have increased to 67% by November 2018, and again to 68% in 2020 (See Table 4.3 below). This is a particularly positive vitality and viability indicator in today's national market context.

4.20 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 4.3: Epsom Town Centre % of Comparison Goods Operators within 'National Multiple' Category

2009	2013	2018	2020
70%	65%	67%	68%

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

4.22 Nevertheless, the trend has been one of decline, and the proportion of comparison goods operators has now fallen marginally below the UK national average, with the most recent loss of H&M, Lakeland and Smiggle. It was recommended – in 2020 – that policy intervention was key to ensuring the protection of Use Class A1 comparison goods operators over the forthcoming Local Plan period.

4.23 In the leisure sector, the 2020 Study reported that planning permission (Ref: 18/01556/FUL) had recently been granted for a new six screen Picture House cinema in Epsom Square, offering bar, restaurant and kiosk area and party room. Construction is now nearing completion, with opening expected during 2022.

4.24 Consistent with the 2020 Study, an up-to-date finer-grained analysis continues to suggest a positive and healthy mix with an above average proportion of cafés, cinemas and theatres, nightclubs, sport/leisure facilities and restaurants, and a below average proportion of betting offices, fast food outlets, and public houses. Fever & boutique and the Boogie Lounge continue to operate popular nightclub venues.

4.25 A further vacant unit audit was undertaken on 20th September 2021, which reflected a healthy, vital and viable town centre. Only 25 vacant units were recorded on the main frontages within each defined character area (Table 4.4 below). Aside from 24-28 West Street there are no particular problem areas identified, with vacant units often being let within reasonable periods of time.

Table 4.4: Vacant Unit Audit, Epsom Town Centre – September 2021

Character Area	Number of Vacant Units
Upper High Street/Upper Town	1
The High Street	4
Spread Eagle	2
The Old Town and Market Place	5
Ashley Centre and Ashley Avenue	4
Waterloo Road	1
South Street	3
Epsom Square	1
West Street	4
TOTAL	25

Source: 20th September 2021

4.26 On Upper High Street there is just one vacant unit which has been empty and boarded up for a number of years. On 'High Street' (eastern end) Chicken and Banter, The Business Exchange Centre and a Textile/bedding shop have all closed and remain vacant. The previously vacant Maplin unit has been sub-divided and occupied by Camile a good quality Thai restaurant open from 12pm-10pm, and Papa Johns Pizza Takeaway. Within Epsom Square the former Jimmy Spice unit (3,500 sq ft) remains vacant, albeit leisure/restaurant lettings may be encouraged over the next few months as a consequence of the new Picture House in this location.

4.27 On South Street, three units remain vacant, including the Rocket pub/bar venue. One of the vacant units is signalling the opening of a new artisan bakery with a poster in the shop window, but there is no opening date. In and around the Market Place the previous large café rouge restaurant is being refurbished with a new licensing application awaiting a planning decision; Lakeland and the Casino/Amusements have closed down, whilst a barbers, Asian takeaway Kokoro and MooBoo milkshake bar have opened.

4.28 The four vacant units in the Ashley Centre comprise the two large floorplate H&M stores, the former Smiggle store and a former mobile phone shop. The H&M stores have only become vacant in mid-September 2021, and their reoccupation should be monitored. The Smiggle and mobile phone stores have been vacant for a longer period of time. In the Spread Eagle shopping precinct, the former Argos store and former shoe shop were recorded as vacant in the 2020 Study and remain vacant.

4.29 Consistent with the 2020 study the proportion of financial and business services remains marginally above national average. It is positive that the town centre has retained all banks including Natwest, HSBC, Lloyds, Barclays, Halifax and Metro bank. This category comprises banks, building societies, estate agents, financial and legal services and employment and career centres, all of which previously fell within the Use Class A2 category. An Article 4 Direction introduced in October 2015, removing permitted development rights from Use Class A1 to Use Class A2 across much of the town centre is now obsolete in the context of the new Use Class E.

4.30 The 2020 Study concluded that development management policies appear to have been successful in preventing the proliferation of fast food outlets and betting offices. This remains the case in 2021, with the Use Classes Order continuing to enable local authorities to control these uses which fall within the Sui Generis category.

4.31 As recorded in the 2020 Study, Epsom has benefitted substantially from continued investment in and around the market place, culminating in the recent unveiling of the Emily Davison statue in Market Place. A number of markets continue to trade successfully throughout the week, and footfall in particularly strong.

Epsom Market Place, September 2021

Stoneleigh Broadway: The 2020 Study, Key Findings

4.32 The 2020 Study concluded that 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 was particularly low.

4.33 The composition and mix of retailing in the Use Class A category (in % terms) had 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 had 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.

4.34 Many of the 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 was the strong rise in Use Class B1 office space at ground floor. These introduce 'dead' frontages and it was concluded that any further growth will dilute retail frontages in what is currently a strong and healthy town centre.

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

4.36 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 were trading substantially above expected company average levels, a trend often emerging from small format foodstore operators trading from small floorplates. It also reflects the strength of catchment in the absence of competing foodstores in close proximity.

4.37 In the context of wider recommendations, it was concluded that Stoneleigh District Centre was not required to accommodate substantial additional comparison or convenience goods floorspace. The 2020 Study confirmed that it was not required in policy to grow in scale, but that the district centre must aim to consolidate and enhance its performance, and resist any further growth in non-retail frontages. It was noted that 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.

Stoneleigh Broadway: 2021 Health Check Update

4.38 Table 4.5 and 4.6 below compares the town centre composition by number of units since the previous audit undertaken in 2019 and presented in the 2020 Study.

Table 4.5: 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

Table 4.6: Diversity of Uses in Stoneleigh District Centre, 2021

	Number of Units	% of Total	UK Average %	Different to UK Average %
Convenience Retail	8	13%	9%	+4%
Comparison Retail	10	16%	27%	-11%
Retail Services	15	25%	16%	+9%
Leisure Services	15	25%	25%	0%
Financial & Business Services	6	10%	9%	+1%
Vacant units	7	11%	14%	-3%
Sub-Total	**61**	**100%**	**100%**	**-**
Other	15	-	-	-
Total units	**76**	**-**	**-**	**-**

Source: Urban Shape site visits, July 2021

4.39 The updated analysis demonstrates that the number of convenience good operators remains the same, and the convenience goods tenant line-up has not changed. The comparison goods sector has not shown the same level of resilience, losing five key comparison goods operators including Maggie's Pet Shop, M R Bradbury Electronic Appliances, The Blooms Boutique Florist, Hangzou Silks (Station Approach), and Antiques Restorers (Station Approach). Operators offering a strong mix of comparison goods – including a pet shop, electrical/household items and a florist – have been lost from the main frontage on The Broadway. The loss of Hangzou Silks and the antiques restorers has further weakened the frontage on the western side of the station; separated from the main Broadway by the railway line.

4.40 The number of vacant units across the centre has increased from 1 to 7, but the overall figure remains comfortably below the national average. Six businesses have closed since 2019 and their premises have not yet been re-occupied, leaving each respective unit vacant:

- Melinda's Café
- Shoe Repairs and Laundrette
- PLH Building Services [off pitch]
- Maggie's Pet Shop
- Hangzou Silks
- Antique Restorers

4.41 As noted above, two of the newly vacant units are on Station Approach, to the west of the railway station, separated from the main high street by the railway line. There are now three vacant units in this location, out of a total of seven. The remaining units include a dry cleaners and a take-way which has recently been refurbished. The other two units comprise an office and a windows showroom.

4.42 It is positive to note that 7 units have remained in the same business/use category, but have undergone investment and refurbishment under new ownership. Continued investment as this level is a strong indicator of the continued health and vitality of Stoneleigh Broadway. New businesses include:

- Epsom Explore Travel Agent
- VTFS Office
- Yaadein Indian Restaurant
- Morley's Take-Away Chicken
- Phillomena Dance School
- Premier Convenience Store and Wines
- Royal Spice Take-Away

4.43 A concern raised in the 2020 Study was the increase in non-retail activity on the frontage, including the introduction of B1 offices thereby creating 'dead' or 'inactive' frontages. Aside from a small increase in vacant units, the up-to-date analysis has identified no further change, with the number of different retail and business uses remaining relatively static. The overall health of Stoneleigh Broadway has declined marginally through the increase in vacant units and the loss of three key comparison goods anchors in the main frontage, but there are clear signs of continued vibrancy and new investment.

4.44 For the purposes of future monitoring, Table 4.7 identifies the number of units within each of the new Use Class planning categories. Given the number of operators now falling within Use Class E, it is not a useful indicator of overall health, but does provide a baseline with which to monitor overall commercial activity on the high street.

Table 4.7: Use Class Composition, July 2021, Stoneleigh Broadway

Use Class	Number	% of Total
E	55	72%
F	4	5%
Sui Generis	10	13%
Vacant	7	9%
TOTAL	76	100%

Ewell Village: The 2020 Study, Key Findings

4.45 The 2020 Study identified that Ewell Village had 66 retail/leisure business operators offering a good mix of key services and retail categories required for people's day-to-day needs. These included 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 had a selection of clothing and specialist comparison goods operators including a millinery hat designers and dance/ballet/gymnastics clothing and accessories.

4.46 A comparison between the 2011 and 2019 land use surveys identified, however, a number of changes suggesting an overall decline in the centre's health. It was recommended that these were responded to in the new Local Plan. In particular, the number of retail/leisure businesses had 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.

4.47 Whilst the proportion of Use Class A1 had fallen significantly, the proportion of Use Class A2 and A3 businesses had grown. The increase in beauty salons in the A2 category was identified as a strong trend, whilst there were no longer any banks or financial services present. The number of vacant units and take-aways across the centre remained particularly low at that point in time.

4.48 A key change in the centre had 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 were identified to be the Post Office and Ewell Spring Pharmacy, whilst the southern part of High Street remained the prime retail frontage. Observations of pedestrian footfall indicate that few people visit north and south during the same shopping trip/visit.

4.49 The quantitative analysis identified that – like Stoneleigh Broadway – Ewell Village had 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 was concluded to be good for a centre the size of Ewell Village, which performs the role of a District Centre.

4.50 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 compared to Stoneleigh Broadway, but overall existing foodstore provision was considered important to the long term vitality and viability of Ewell Village.

4.51 The 2020 Study recommended no additional comparison or convenience goods floorspace in Ewell Village over the plan period. The 2020 Study concluded that the centre is not required to grow in scale, but – like Stoneleigh Broadway – the district centre must aim to consolidate and enhance its performance. It was concluded that 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.

Ewell Village: 2021 Health Check Update

4.52 Table 4.8 and 4.9 below compares the town centre composition by number of units since the previous audit undertaken in 2019 and presented in the 2020 Study.

4.53 The analysis identifies that the overall health of Ewell Village has declined over a 2 year period, since the previous survey in September 2019. The number of vacant units has increased from 5 to 11, equating to jump from 8% to 16%, now standing above the national average. Seven newly vacant units have not yet been re-occupied following the closure of the following businesses:

- Rafayel restaurant;
- Bluebell Boutique Childrenswear;
- Riche Ladieswear;

- Palermo Pizza restaurant;
- The Ironing Service;
- Rossa Café;
- General clothing shop, name unknown.

4.54 Re-occupation of newly vacant units should be monitored in light of new PD rights and Use Classes Order enabling a greater degree of flexibility and the ability for 'non-retail' uses to occupy units, including offices. There was little sign of internal refurbishments within the vacant units observed, and the longer they stand empty the greater the risk of change of use away from retail and leisure within the Use Class E.

Table 4.8: 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 Services	24	36%	15%	21%
Leisure Services	18	27%	24%	3%
Financial & Business	0	0%	10%	-10%
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

Table 4.9: Diversity of Uses in Ewell Village District Centre, 2021

	Number of Units	% of Total	UK Average %	Different to UK Average %
Convenience Retail	3	5%	9%	+4%
Comparison Retail	12	18%	27%	-9%
Retail Services	25	38%	16%	22%
Leisure Services	15	23%	25%	-2%
Financial & Business Services	0	0%	9%	-9%
Vacant units	11	16%	14%	2%
Sub-Total	**66**	**100%**	**100%**	**-**
Other	8	-	-	-
Total units	**74**	**-**	**-**	**-**

Source: Urban Shape site visits, July 2021

4.55 The number of comparison goods operators has fallen from 16 to 12, with the loss of the following businesses since the 2020 Study:

- Bluebell boutique childrenswear;
- Wildwood Gallery and Picture Framers;
- Riche Ladieswear;
- General clothing shop, name unknown.

4.56 The 2020 Study recognised the 'good representation (6 units) of ladieswear and children's clothing shops', including handmade hats and specialist dancewear. The 2021 audit has identified that three of these have now closed – as listed above – and only three remain including the millinery, dance shop and handbags. A number of other useful day to day businesses continue to trade, including the chemist, pet supplies, florist, computer repairs and a charity shop.

4.57 Overall, the total number of trading convenience, comparison, financial/business, and retail and leisure service businesses has fallen from 61 to 55. There are just three new businesses in Ewell Village, including Sixteen Hair Dressers, Beaux Beauty and Robert Dean Estate Agents. The area around the High Street/Cheam Road junction had already experienced a dilution of retail and leisure uses, and there has been no change to this in more recent months. 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.

4.58 Ewell Village has retained all three convenience stores, with the tenant line-up remaining unchanged (Sainsbury's Local, Co-Op, and Safegate News), and the high street has retained the Post Office. There remain no banks or building societies, and there are no independent convenience stores such as bakers, butchers or fishmongers. As identified in the 2020 Study, retail services remain the dominant business in Ewell Village, comprising predominantly hairdressers, barbers and beauty salons.

4.59 The number of leisure services has fallen from 18 to 15, with the loss of Rossa café, Rafayel restaurant, and Palermo Pizza restaurant. The 2020 Study identified the large vacant unit on the prime retail pitch, previously occupied by a furniture shop and then 'The Lounge' Cocktail Bar; this unit remains vacant demonstrating the absence of demand for larger units in Ewell Village.

4.60 For the purposes of future monitoring, Table 4.10 identifies the number of units within each of the new Use Class planning categories. Given the number of operators now falling within Use Class E, it is not a useful indicator of overall health, but does provide a baseline with which to monitor overall commercial activity on the high street.

Table 4.10: Use Class Composition, July 2021, Ewell Village

Use Class	Number	% of Total
E	55	74%
F	0	0%
Sui Generis	8	11%
Vacant	11	15%
TOTAL	**74**	**100%**

5. Quantitative Need

5.1 The 2020 Study sets out the quantitative performance of existing town centre retail floorspace, identifies known planning commitments, and forecasts the need for additional convenience and comparison goods floorspace over the plan period to 2032. Urban Share are instructed to update those forecasts in the context of the Covid-19 pandemic, subsequent economic uncertainty and fluctuations and accelerated trends identified in earlier sections.

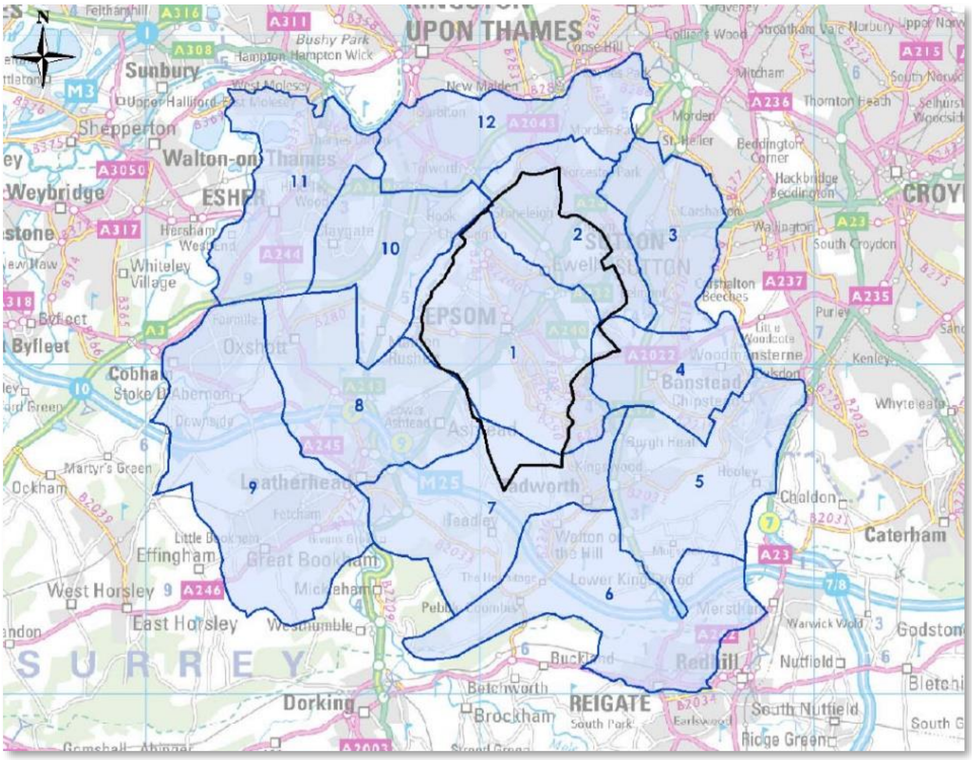
5.2 In this section, we set out our assessment of the need for additional convenience and comparison goods retail floorspace across the borough. The quantitative tabulations accompanying this assessment are set out in Appendix 1 (convenience) and 2 (comparison).

Data Inputs

Survey Area and Household Telephone Survey

5.3 The 2020 Survey Area remains the same, and this update utilises the same 2019 household telephone survey data and associated baseline shopping patterns for convenience and comparison goods.

Figure 5.1: Epsom & Ewell Household Telephone Survey Area (2019)



5.4 The updated analysis draws on the same population estimates and forecasts for each of the survey zones, as derived using the Experian E-Marketer in-house system in 2020. 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.

Special Forms of Trading (SFT)

5.5 As section 3 of this report set out, online shopping (SFT) is accounting for an increasingly significant share of total available expenditure, particularly in respect of comparison goods shopping, and Experian forecast that the 'claim' which online shopping makes on total available comparison and convenience goods spend will increase considerably in future years. Retail capacity forecasts are only concerned with identifying the need for new physical 'bricks and mortar' retail floorspace, and it is necessary to deduct spending via Special Forms of Trading (SFT) from baseline expenditure forecasts.

5.6 The 2019 household survey established the level of internet shopping across the survey area for both convenience and comparison goods shopping. The survey results identified that, for convenience and comparison goods, rates of online shopping across the survey area are significantly higher than the current UK averages identified in Experian's Retail Planner Briefing Note (October 2020).

5.7 On average, in 2019, 11.6% of convenience goods shopping across the survey area is undertaken online, compared to a national average of 4.2%, whilst for comparison goods the figure is substantially higher at 32.8% compared to a national average of 17.5%. We have therefore deducted 11.6% and 32.8% from the convenience and comparison goods per capita available spend in the 2019 baseline.

5.8 At the national level, Experian forecast that the proportion of convenience goods spend which is spent online will increase by 1.2 percentage points to the period 2022, and 1.1 percentage points between 2022 and 2027, and again by 0.4 percentage points between 2027 and 2032. On the assumption that the survey area will continue to follow national trends, we have applied the same percentage point increases to the base year SFT claim of 11.6%, meaning that by 2032, online shopping will account for 14.3% of total available convenience goods spend in the survey area (Table 6.1 below).

Table 5.1: Convenience goods SFT deductions

	2022	2027	2032
Experian UK average convenience SFT (%)	5.4%	6.5%	6.9%
Survey area average convenience SFT (%)	12.9%	13.9%	14.3%

Source: Table 3, Appendix 1 (for survey area figures) / Experian RPBN (for UK averages)

5.9 At the national level, Experian forecast that the proportion of comparison goods spend which is spent online will increase from 17.5% in 2019 to 22.5% in 2022 (+5.0 percentage points), 25.8% by 2027 (+3.3% percentage points), and 27.4% by 2032 (+1.6% percentage points). On the assumption that the survey area will continue to follow national trends, we have applied the same percentage point increases to the base year SFT claim of 32.8%, meaning that by 2041, online shopping will account for 42.7% of total available comparison goods spend in the survey area (Table 6.2 below).

Table 5.2: Comparison goods SFT deductions

	2022	2027	2032
Experian UK average comparison SFT (%)	22.5%	25.8%	27.4%
Survey area average comparison SFT (%)	37.8%	41.1%	42.7%

Source: Table 3, Appendix 2 (for survey area figures) / Experian RPBN (for UK averages)

Per Capita Expenditure Forecasts

5.10 Forecasts of per capita expenditure for convenience and comparison goods expenditure utilise the 2020 Study baseline year (2019) and apply growth rates based on economic forecasts published by Experian Business Strategies. The up-to-date forecasts presented by Experian (Retail Planner 18, October 2020) ensure due consideration to the consequences and impact of Covid-19 on the retail sector. These trends are discussed earlier, in Section 3 of this report.

5.11 In respect of convenience goods, there was a food shopping boom during 2020 as people went through a period of lockdown 'panic-buying' amid fears of food shortages, and restaurants and pubs closed removing the option to 'eat out'. This is forecast to substantially decline during 2021, almost cancelling out this fluctuation, with growth per head returning to pre-Covid levels. For convenience goods we have applied growth rates of 8.4% per annum in 2020, -6.4% in 2021, 0.2% in 2022, 0% between 2023 and 2027, and 0.1% between 2028 and 2032.

5.12 Comparison goods floorspace is expected to benefit as an improvement in confidence and incomes help stimulate discretionary spending throughout 2021. We have already seen retail spending bounce back swiftly following the easing of lockdown during summer 2020, and again after lockdown in January/February/March 2021. Volumes are expected to reach pre-Covid levels in 2022, and whilst the growth outlook remains similar to before, spending is likely to average 9% below levels expected before the pandemic. For comparison goods, we have applied growth rates of -8.5% 2020; 6.5% 2021; 3.8% 2022; 3.0% 2023-2027; 2.9% 2028-2040.

5.13 After deducting SFT, spend per capita on convenience and comparison goods is expected to grow conservatively, with comparison goods experiencing a decline in the period 2019-2022:

- Convenience Goods: £2,197 per head in 2019; £2,208 per head in 2022; £2,180 spend per head in 2027; and £2,181 spend per head in 2032.
- Comparison Goods: £3,311 per head in 2019; £3,100 per head in 2022; £3,429 per head in 2027; and £3,849 per head in 2032.

Total Available Expenditure

5.14 Using the growth rates above and applying relevant deductions for SFT, total available expenditure across the survey area has been grown to the periods 2022, 2027 and 2032. Total expenditure is forecast as follows:

- Appendix 1, Table 3 applies per capita expenditure to the population forecasts, which indicates that total available **convenience** goods expenditure within the survey area was £1,116m in 2019. This is forecast to grow to £1,157m by 2022, £1,196m by 2027, and again to £1,243m by 2032. This equates to an overall increase of £126m between 2019 and 2032 (Appendix 1, Table 3).
- **Comparison** goods expenditure within the survey area in 2019 was £1,683m. This is forecast to fall to £1,625m by 2022; and then to grow to £1,881m by 2027; and again to £2,194m by 2032. This equates to an overall growth for comparison goods expenditure in the survey area of £510m between 2019 and 2032 (30.3% growth) (Appendix 2, Table 3).

5.15 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. The projections are subject to greater than usual uncertainty due to the unprecedented nature of the Covid-19 pandemic.

Sales Efficiency, Existing Floorspace

5.16 In forecasting quantitative need for future retail floorspace, we have drawn on economic commentary published by Experian in February 2020 and October 2020. In particular, our analysis and need assessment has regard to the implications of Covid-19 on floorspace efficiency; i.e. the rate in which existing floorspace will absorb any growth in expenditure over the plan period. This has a direct impact on the levels of floorspace need arising.

5.17 Consistent with growth in expenditure per head on convenience goods, the short term outlook in respect of the sales efficiency of existing floorspace has been upgraded to reflect the boost to spending on food during the Covid-19 pandemic. This is a consequence of social distancing measures such as working from home and spending more time at home, and being unable to eat out in restaurants and cafes.

5.18 Experian assume a substantial increase in sales efficiency rate for existing convenience goods floorspace of 5.4% in 2020, followed by a sizeable drop of -4.8% in 2021; and a subsequent return to 'more normal' levels of 0.7% 2022, and 0.3% 2023-40 (source: Experian Retail Planner 18, October 2020.

5.19 To the period February 2020 (pre-Covid-19), Experian confirmed that sales densities for comparison goods floorspace had risen at a strong pace, and were expected to continue to do so – remaining between 3.2% and 3.6% to the period 2026. Budgetary challenges, rising costs and tight margins were driving retailers to either close down or seek floor space efficiencies.

5.20 Experian explained that lacklustre demand for retail property, stubborn levels of vacant units and a lull in retail construction point to limited prospects for expansion in retail floorspace over the next few years. In this context, it was expected that existing comparison goods floorspace would continue to absorb a greater proportion of any growth in retail expenditure as businesses sought to improve the quality and interest of their shops for visitors.

5.21 In current commercial markets, Experian concluded that there would not therefore be a strong demand for additional comparison goods retail space, with a growing proportion of expenditure growth being directed to the internet and the consolidation and improvement of existing floorspace – particularly in stronger city centres. These trends explain the considerable improvement in the performance of comparison goods floorspace in Epsom Town Centre (per sq m) in recent years as recorded in the 2020 Study (paragraph 8.43).

5.22 Subsequent to the publication of these trends in February 2020, the Covid-19 pandemic had far reaching consequences for our high streets and town centres as all but essential shops and services closed for long periods of time.

5.23 The Experian Retail Planner October 2020 revised sales efficiency forecasts in the context of Covid-19, stating that sharp swings in retail spending due to the temporary closure of businesses as well as ongoing social distancing restrictions have led to volatile sales densities in 2020. Whilst this is expected to correct once the spending recovery becomes more established, the medium-term forecast for sales densities has – following a period of instability – been revised lower in line with the downgrade in the outlook for retail spending.

5.24 For comparison goods, Experian estimate that existing retail floorspace experienced a fall in retail sales density by -14.1% as a consequence of store closures during lockdowns and short periods of being 'open for trading'. Experian forecast some correction to this, with an improved sales density of 8.6% in 2021, 3.4% in 2022, 2.6% between 2023-2027, and 2.9% between 2028 and 2032. From 2023 onwards the rates are not dissimilar to the 2020 Study.

5.25 Covid-19 has had a positive impact on the performance of existing foodstores and other convenience goods floorspace in the short term and being retained in the medium to long term; but a negative impact on existing comparison goods floorspace over the short to medium term.

Floorspace Need – Convenience Goods

Table 5.3: Convenience Goods Floorspace Need (sq m net) – The 2020 Study

2022	2027	2032
6,900 sq m net	7,700 sq m net	8,400 sq m net

5.26 2021 Scenario 1 (Table 5.4 below) is based on Epsom & Ewell retaining current market share and the level of inflow from the beyond the borough boundary currently benefitting convenience goods foodstores in the borough.

Table 5.4: Convenience Goods Floorspace Need (sq m net) – 2021 Update, Scenario 1

2022	2027	2032
6,300	6,700	7,200

5.27 Scenario 1 in informed by the premise that boroughs are not closed systems and there are inflows and outflows of expenditure. Nevertheless, and particularly in built up urban areas such as Epsom & Ewell it is also relevant to consider the need for additional foodstores based on the market share of borough residents only; i.e. those living in Zones 1 and 2. Current high levels of inflow of shoppers from beyond the borough drives the strong performance of foodstores in the borough, which in turn drives a higher 'need' figure for additional foodstores. Scenario 2 is underpinned by more sustainable travel patterns and reflects the needs of borough residents only. Scenario 2 (Table 5.5 below).

5.28 Scenario 2 focuses on geographical locational need, rather than the requirement to meet the needs of those living in neighbouring boroughs who are currently travelling into the borough to access foodstores – in the case of Epsom & Ewell, the out-of-centre Sainsbury's at Kiln Lane and Aldi, Kingston Road in particular. Scenario 2 forecasts need based on the expenditure of borough residents only – in this scenario, the model demonstrates that convenience goods foodstores are still performing at strong levels, above the combined company average performances. As such, there is a small level of forecast need for additional space.

Table 5.5: Convenience Goods Floorspace Need (sq m net) – 2021 Update, Scenario 2

2022	2027	2032
2,000	2,300	2,700

5.29 In terms of meeting need identified, the 2020 Study concluded that the Sainsbury's Kiln Lane could absorb a proportion of identified need; whilst the Aldi, Kingston Road is at full capacity with no physical room for expansion of the store or car park. The 2020 Study also concluded that 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". This conclusion remains relevant and up-to-date.

Floorspace Need – Comparison Goods

5.30 Floorspace need for comparison is much subdued in the updated 2021 forecasts (Table 5.6 and 5.7 below.

Table 5.6: Comparison Goods Floorspace Need (sq m net) – The 2020 Study

2022	2027	2032
800 sq m net	2,900 sq m net	5,700 sq m net

Table 5.7: Comparison Goods Floorspace Need (sq m net) – 2021 Update

	2022	2027	2032
Epsom Town Centre	-100 sq m net	400 sq m net	700 sq m net
Stoneleigh Broadway	-300 sq m net	-200 sq m net	-100 sq m net
Ewell Village	-200 sq m net	-200 sq m net	-100 sq m net

5.31 The figures demonstrate that there is currently no need for additional comparison goods floorspace in the short term period, with only a small surplus over the plan period. The reasons for this are consistent with identified national trends. Expenditure growth has been hit in the short to medium term as a consequence of Covid-19, SFT is substantially greater through accelerated trends and strong localised rates in the borough, and the rate that existing floorspace is absorbing expenditure continues to remain strong (claiming a high proportion of expenditure growth).

5.32 The rate of expenditure growth is not sufficient to substantially override the rate that existing floorspace is absorbing spend over time. Combined with such a strong growth in SFT leads to the current status quo, and only a small level of additional need over the plan period. The over-supply is not currently substantial, so that doesn't raise a huge concern that you need to lose space. You have to instead protect what you have to consolidate and support healthy town centres over the plan period.

6. Conclusions and Recommendations

Policy

6.1 The NPPF continues to advocate 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 at the heart of their communities and to pursue policies which protect their health and vitality.

6.2 Introduced from 1st September 2020, new planning regulations revoked parts A and D of the existing use classes order and introduced a new 'commercial, business and service' Use Class E, incorporating former A1, A2 and A3 retail uses. Former A4 (drinking establishments, public houses/wine bars) and A5 (hot food takeaway) uses and D2 cinemas, concert halls/live music venues, bingo halls and dance halls are now defined as Sui Generis. Isolated rural shops and other community uses are now protected under new Use Class F.

6.3 A new permitted development (PD) right to allow the change of use from any use, or mix of uses, from the Commercial, Business and Service use class (Class E) to residential use (Class C3) took effect on 1 August 2021. This applies to 'unused' buildings that have been vacant for 3 months, are no larger than 1,500 sq m, and were previously used for at least 2 years continuously for commercial, business or service use.

National Trends and Covid-19

6.4 In parallel with recent legislative change, consumer and economic trends in the retail and leisure sector 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.

6.5 The Covid-19 pandemic had an immediate impact on town centres, and whilst the longer term implications remain uncertain, it is widely accepted that town centres will bounce back to varying degrees. On-line sales have continued to rise and demand for retail floorspace has dropped, but trends demonstrate that there is still a strong case for bricks-and-mortar shopping – particularly when combined with internet shopping.

6.6 Legislative change was extended in remit and accelerated in pace as a consequence of the pandemic and longer term consumer trends with the stated intention to help revitalise towns. Within this new planning context, town centre development plan policies and wider strategies must be revised accordingly to protect and also to encourage the right growth in the right places where possible.

Town Centre Change

6.7 The up-to-date analysis demonstrates very little change in the composition of Epsom town centre with small fluctuations in category reflective of national trends. The number of convenience, comparison and financial and business services have seen a very small decrease, whilst retail and leisure services have grown in number. Overall, the composition of the town centre is generally well balanced reflecting wider national trends.

6.8 Since the 2020 Study, the new Lidl foodstore has opened on Upper High Street and the Picture House cinema in Epsom Square is nearing completion. The analysis has identified a positive and healthy mix of leisure services with a below average representation of fast food takeaways, betting offices and public houses. Development management policies have been successful in preventing the proliferation of takeaways and betting offices, and the new Use Classes Order enables local authorities to continue with this policy position.

6.9 Aside from the development site at 24-28 West Street, there are no areas subject to vacancy clustering, and the proportion of vacant units remains below the national average. Investment in the public realm and highways have continued, with the market place public realm enhancements being completed, the unveiling of the Emily Davison statue, and the resurfacing of the road and pavements on East Street – a key gateway route into the town centre.

6.10 There are areas of concern, however. In mid-September, H&M closed two large floorplate units in the Ashley Shopping Centre, and since the 2020 Study a small number of other key retailers have closed, including Lakeland on the Market Place, and Smiggle and Kiko make-up in the Ashley Shopping Centre. The former Jimmy Spice unit in Epsom Square remains vacant, but the opening of the Picture House cinema may stimulate leisure representation in this general area. The Article 4 Direction removing permitted development rights from Use Class A1 to Use Class A2 in order to retain active shop frontages is now obsolete following recent planning reform.

6.11 As concluded in the 2020 Study, Stoneleigh Broadway remains and healthy and vibrant town centre, but there are signs of a small decline in vitality indicators. Whilst the representation of a strong convenience sector remains unchanged, there has been an increase in vacant units from 1 to 7, and the loss of three key comparison goods operators. Station Approach has declined with three of the seven units now vacant; and elsewhere on the main high street there are clear signs of new investment and the introduction of new businesses in newly refurbished units. The 2020 Study raised concerns in respect of the introduction of B1 office uses, but the up-to-date analysis reports no further change of use to non-retail activity.

6.12 The up-to-date analysis concludes that the overall health of Ewell Village has declined since the 2020 Study, with the number of vacant units increasing from 5 to 11. It is recommended that the reoccupation of vacant units should be closely monitored regularly in light of new PD rights and Use Classes Order enabling a greater degree of flexibility and the ability for 'non-retail' uses to occupy units.

6.13 Whilst the convenience goods line-up in Ewell Village remains unchanged, the total number of trading retail and service businesses has fallen from 61 to 55, with little sign of investment and refurbishment in those vacant units identified. The centre has a Post Office, but there are no banks, and the number of restaurants have also fallen from 18 to 15. The large vacant unit on the prime pitch, previously occupied by The Lounge Cocktail Bar, remains vacant.

Quantitative Need

6.14 Floorspace need forecasts have been impacted directly by Covid-19 since the 2020 Study by accelerated trends in the growth of on-line shopping, and strong fluctuations in the efficiency of existing floorspace and its ability to absorb expenditure. The analysis concludes that there is no need to forecast for additional comparison goods floorspace in Epsom town centre, Stoneleigh Broadway or Ewell Village town centres.

6.15 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 foodstores. When considering the needs of borough residents and more sustainable shopping and travel patterns, the need for additional floorspace is substantially reduced. It is concluded that this expenditure could – in part – be absorbed by the Sainsbury's at Kiln Lane.

Recommendations

6.16 The 2020 Study set out a series of clear and robust policy recommendations, a number of which are now out-of-date in the context of more recent planning reform and wider national and economic influences. Previous recommendations, for example, included retaining the level of Use Class A1 within the primary shopping frontages, restricting change of use from Use Class A1 to Use Class A2, and restricting change of use to B1 offices and D2 leisure including gyms/health and fitness centres. It is now not possible for policy to be so prescriptive within the new planning framework, which aims to drive flexibility and 'bounce back' post Covid-19.

Epsom Town Centre

6.17 We have reviewed the previous recommendations and refined accordingly within the new planning framework, as follows:

EP1: Retain the Primary Shopping Area, Primary Shopping Frontage and Secondary Shopping Frontage as existing.

EP2: Policy to prevent non Use Class E within the Primary Shopping Frontage. Prevent any change of use to alternative uses, including those in sui generis use. Use Class E includes:

- Use Class E Shops (former A1)
- Provision of financial and professional services (former A2)
- Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
- Indoor sport, recreation, fitness (gyms) (former D2)
- Provision of medical or health services (former D1)
- Creche, day nursery or day centre (former D1)
- Offices, research and development, light industrial (former B1a, b and c)

EP3: Policy to prevent non Use Class E within the Secondary Shopping Frontage aside from the introduction of former Use Class A4 (public houses, wine bars or drinking establishments). Former Use Class A4 (drinking establishments) should be considered on a case by case basis and on the merits of each respective planning application. An over proliferation should be avoided and other issues considered, such as noise.

EP4: Introduce an Article 4 Direction to prevent permitted change of use from Use Class E to Use Class C3 (dwellinghouse), to protect the thriving core of the high street.

EP5: Epsom Square should be the focus of the daytime and evening leisure economy in terms of eating and drinking. Policy to incorporate Epsom Square into the Secondary Shopping Frontage to enable former Use Class A4 as considered on a case by case basis. Non-Use Class E should be considered on a case by case to help retain the restaurant offer as a policy priority, as opposed to the proliferation of wine bars/bars and clubs.

EP6: Continue to monitor the health of the town centre moving forwards, by retail and leisure category. This will enable any change in the mix and composition of uses to be understood and analysed, and allow comparisons with wider national trends to be made. Use Class E covers a multitude of uses, and alone will not enable a full understanding of mix, composition, key footfall drivers and overall health. Categories should be as follows:

- Comparison
- Convenience
- Retail Service
- Leisure Service
- Financial and Business Services
- Vacant Units
- Other non-retail, including offices

EP7: 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.

EP8: Encourage the retention of town centre foodstore operators and monitor the implementation of the newly opened Lidl foodstore on Upper High Street. 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.

EP9: 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.

EP10: Clearly set out a policy framework and strategy for each of the key vision/character areas, setting out the uses permitted in each location. A strong strategy for each area will assist in investment decisions and locational choices for operators as they understand more about the vision and future opportunity and change.

EP11: The forecast need conclusions do not require any further sites for comparison or convenience goods floorspace to be identified in Epsom 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:

- 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 units, 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.

EP12: Reinforce the presence of good quality clothing and footwear and other comparison goods operators. This should include 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. There is substantial opportunity to simplify and improve the pedestrian crossing area at the junction of High Street, Upper High Street, Church Street and East 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 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. Add robust policy guidelines to development plan site allocations, setting out specific floorspace/land uses that would be deemed acceptable on each respective site including – for example – non-food comparison goods and cafes. Uses on site can be further controlled by applying conditions to planning permissions.

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: Ensure the development plan requires compliance with retail policy tests for development proposals as set out in the NPPF and PPG, including the impact test and sequential site assessment.

EP20: Continue to monitor recent planning reform, outcomes for town centres and any further proposals moving forwards.

EP21: Continue to monitor competing centre development proposals and aspirations to improve their town centre offer.

Stoneleigh Broadway District Centre

ST1: 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.

ST2: Retain Primary Shopping Area Boundary, including Station Approach to the west of the railway line/train station. The high rate of vacancies on Station Approach should be closely monitored in the context of new planning legislation encouraging a greater level of flexibility.

ST3: Policy to prevent non Use Class E within the Primary Shopping Frontage. Prevent any change of use to alternative uses, including those in sui generis use. Use Class E includes:

- Use Class E Shops (former A1)
- Provision of financial and professional services (former A2)
- Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
- Indoor sport, recreation, fitness (gyms) (former D2)
- Provision of medical or health services (former D1)
- Creche, day nursery or day centre (former D1)
- Offices, research and development, light industrial (former B1a, b and c)

ST4: Introduce an Article 4 Direction to prevent permitted change of use from Use Class E to Use Class C3 (dwellinghouse), to protect the thriving core of the high street.

ST5: Continue to monitor the health of the town centre moving forwards, by retail and leisure category. This will enable any change in the mix and composition of uses to be understood and analysed, and allow comparisons with wider national trends to be made. Use Class E covers a multitude of uses, and alone will not enable a full understanding of mix, composition, key footfall drivers and overall health. Categories should be as follows:

- Comparison
- Convenience
- Retail Service
- Leisure Service
- Financial and Business Services
- Vacant Units
- Other non-retail, including offices

ST6: Support town centre Community Library where possible.

ST7: Retain free on-street car parking. Encourage environmental improvements and seek allocated funding, particularly targeted around the station area.

ST8: 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.

Ewell Village District Centre

EW1: 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.

EW2: Retail Primary Shopping Area Boundary.

EW3: Policy to prevent non Use Class E within the Primary Shopping Frontage. Prevent any change of use to alternative uses, including those in sui generis use. Use Class E includes:

- Use Class E Shops (former A1)
- Provision of financial and professional services (former A2)
- Sale of food and drink consumption on premises, 'cafes and restaurants' (former A3)
- Indoor sport, recreation, fitness (gyms) (former D2)
- Provision of medical or health services (former D1)
- Creche, day nursery or day centre (former D1)
- Offices, research and development, light industrial (former B1a, b and c)

EW4: Introduce an Article 4 Direction to prevent permitted change of use from Use Class E to Use Class C3 (dwellinghouse), to protect the thriving core of the high street.

EW5: 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.

EW6: Retain free short-stay on-street car parking to support the local top up shopping role of the Village Centre.

Appendix 1

Convenience Goods Floorspace Need

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

urban shape
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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	2,532	12.8%	324	2,208
2027	2,532	13.9%	352	2,180
2032	2,544	14.3%	364	2,181

Expenditure growth rates: 2020: 8.4%; 2021: -6.2%; 2022: 0.2%; 2023-2027: 0.0%; 2028-2040: 0.1%

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

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

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	143.66	145.72	184.50	44.48	36.67	40.28	42.54	56.95	72.36	76.19	76.42	237.86	**1,157.65**
2027	150.07	151.11	191.20	45.95	38.05	41.81	43.76	57.96	73.22	78.78	78.01	246.20	**1,196.12**
2032	157.22	157.56	199.11	47.92	39.76	43.33	45.41	59.61	75.14	81.80	80.31	256.08	**1,243.25**
Change 2019-32	***19.49***	***17.45***	***21.95***	***4.90***	***4.44***	***4.49***	***4.28***	***3.97***	***4.18***	***8.21***	***5.95***	***26.97***	***126.27***

Source: Tables 1 & 2

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	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 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	**143.7**	**145.7**	**184.5**	**44.5**	**36.7**	**40.3**	**42.5**	**57.0**	**72.4**	**76.2**	**76.4**	**237.9**	**1,157.6**	**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	**12.7**	**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*	*1.4*	*1.1*	*0.3*	*0.6*	*0.3*	*1.5*	***28.5***	***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	*2.6*	*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	**10.1**	**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*	***15.9***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	9.7	11.3	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.0	0.6	13.6	**39.1**	**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*	*13.6*	***42.4***	***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	**3.2**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	50.8	15.5	0.0	4.6	0.9	0.7	2.5	2.3	0.3	4.8	1.3	0.8	**84.6**	**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	**5.2**	**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	**3.1**	**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)	*61.5*	*17.5*	*0.3*	*4.6*	*0.9*	*0.7*	*2.5*	*2.3*	*0.3*	*4.9*	*1.3*	*1.2*	***98.2***	***8.5%***
Total for Epsom & Ewell Borough (A)	**96.1**	**51.1**	**5.1**	**6.7**	**1.7**	**1.4**	**5.0**	**3.6**	**0.6**	**7.3**	**2.5**	**18.6**	**199.7**	**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	**143.7**	**145.7**	**184.5**	**44.5**	**36.7**	**40.3**	**42.5**	**57.0**	**72.4**	**76.2**	**76.4**	**237.9**	**1,157.6**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	9.8	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	19.5	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**21.6**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.2	28.4	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.7**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.6	31.3	20.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.3	**63.7**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.7	6.5	27.6	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	**40.2**	**3.5%**
Waitrose, Banstead (zone 4)	3.9	3.3	1.9	12.6	4.8	1.7	2.6	0.0	0.0	0.0	0.0	0.0	**30.9**	**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	**57.8**	**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	9.9	0.3	0.0	0.0	**22.0**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.8	0.0	0.0	0.0	0.0	0.2	0.4	6.2	6.4	0.0	0.0	0.0	**16.0**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	1.9	0.0	0.0	0.0	0.0	0.4	2.8	19.8	13.4	4.3	0.5	0.0	**43.1**	**3.7%**
M&S Foodhall, Ashtead (zone 8)	1.5	0.0	0.0	0.0	0.0	0.0	0.2	5.2	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	23.6	**28.0**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	7.4	17.4	**30.7**	**2.7%**
Other main stores in survey area (outside E&E Borough)	6.5	18.4	36.8	5.8	4.8	6.6	7.2	3.2	19.5	20.3	15.4	41.1	**185.6**	**16.0%**
Sub-total, other stores in survey area (B)	*31.8*	*82.7*	*151.6*	*34.8*	*19.3*	*11.4*	*33.2*	*48.2*	*51.0*	*41.3*	*35.1*	*98.7*	***639.2***	***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	16.0	0.0	0.0	0.7	0.0	0.0	0.0	**17.3**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.5	1.8	6.5	1.6	**17.6**	**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	33.1	**49.8**	**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	10.5	0.8	**11.5**	**1.0%**
Other main stores outside survey area	11.0	5.6	23.8	1.9	14.5	5.6	3.0	3.4	9.9	17.7	15.9	81.3	**193.6**	**16.7%**
Sub-total, stores outside survey area (C)	*13.9*	*9.5*	*24.1*	*2.0*	*15.3*	*26.6*	*3.1*	*3.7*	*18.1*	*26.6*	*35.7*	*116.7*	***295.3***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**45.8**	**92.2**	**175.7**	**36.8**	**34.6**	**38.0**	**36.2**	**51.9**	**69.2**	**67.9**	**70.8**	**215.4**	**934.5**	***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	**2.4**	**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	1.5	2.6	1.0	3.2	3.8	**20.7**	**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**	**23.5**	**2.0%**
Total (A+B+C+D)	**143.7**	**145.7**	**184.5**	**44.5**	**36.7**	**40.3**	**42.5**	**57.0**	**72.4**	**76.2**	**76.4**	**237.9**	**1,157.6**	**100.0%**

Source: Table 3, Table 4

Table 7 - Convenience goods spend (£m) 2027

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 - 2027	**150.1**	**151.1**	**191.2**	**45.9**	**38.0**	**41.8**	**43.8**	**58.0**	**73.2**	**78.8**	**78.0**	**246.2**	**1,196.1**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	9.9	0.3	0.5	0.8	0.1	0.3	0.5	0.7	0.1	0.0	0.1	0.0	**13.2**	**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	**6.9**	**0.6%**
Tesco Express, Epsom Station	0.9	0.6	3.6	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	**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	**2.6**	**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	*15.5*	*2.5*	*4.1*	*0.8*	*0.7*	*0.7*	*1.5*	*1.1*	*0.3*	*0.7*	*0.3*	*1.5*	***29.6***	***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	**3.6**	**0.3%**
Co-Op, High Street	1.4	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*	*2.2*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***5.7***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	9.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**10.5**	**0.9%**
Co-Op, Broadway	0.0	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.0**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*15.3*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.9*	***16.5***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	10.2	11.7	0.9	0.7	0.0	0.0	1.0	0.2	0.0	1.1	0.6	14.1	**40.6**	**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	**3.4**	**0.3%**
Sub-total, Kingston Road local centre stores	*11.3*	*13.7*	*0.9*	*0.9*	*0.0*	*0.0*	*1.0*	*0.2*	*0.0*	*1.1*	*0.9*	*14.1*	***44.0***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	3.9	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.0	**6.1**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.6	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	53.0	16.0	0.0	4.8	1.0	0.7	2.6	2.4	0.3	5.0	1.4	0.8	**88.0**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	4.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	**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	3.6	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**5.5**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*64.3*	*18.1*	*0.3*	*4.8*	*1.0*	*0.7*	*2.6*	*2.4*	*0.3*	*5.1*	*1.4*	*1.3*	***102.1***	***8.5%***
Total for Epsom & Ewell Borough (A)	**100.4**	**53.0**	**5.3**	**7.0**	**1.7**	**1.5**	**5.1**	**3.7**	**0.6**	**7.5**	**2.5**	**19.3**	**207.5**	**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	**150.1**	**151.1**	**191.2**	**45.9**	**38.0**	**41.8**	**43.8**	**58.0**	**73.2**	**78.8**	**78.0**	**246.2**	**1,196.1**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	10.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	**12.7**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.4	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**7.9**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.6	2.7	13.9	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**18.4**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.3	20.2	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**22.4**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.2	29.4	0.7	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**32.9**	**2.7%**
Sainsbury's, London Road, North Cheam (zone 3)	1.7	32.4	21.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.6	**66.0**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.8	6.8	28.6	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.0	**41.6**	**3.5%**
Waitrose, Banstead (zone 4)	4.1	3.5	2.0	13.0	5.0	1.8	2.6	0.0	0.0	0.0	0.0	0.0	**32.0**	**2.7%**
Asda, Burgh Heath (zone 7)	11.7	0.0	3.4	13.9	9.2	2.5	15.4	0.7	1.0	1.7	0.4	0.0	**59.8**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	5.1	6.7	10.0	0.3	0.0	0.0	**22.4**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	2.9	0.0	0.0	0.0	0.0	0.2	0.4	6.3	6.5	0.0	0.0	0.0	**16.3**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	2.0	0.0	0.0	0.0	0.0	0.5	2.9	20.2	13.5	4.4	0.5	0.0	**43.9**	**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	**7.5**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.4	0.0	0.0	0.0	0.0	0.0	0.1	6.5	0.0	0.0	0.2	0.0	**7.3**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.0	10.1	0.0	**16.1**	**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	3.1	1.4	24.4	**28.9**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	7.5	18.1	**31.7**	**2.6%**
Other main stores in survey area (outside E&E Borough)	6.8	19.1	38.1	6.0	5.0	6.8	7.4	3.3	19.7	21.0	15.8	42.6	**191.5**	**16.0%**
Sub-total, other stores in survey area (B)	*33.2*	*85.8*	*157.1*	*35.9*	*20.0*	*11.9*	*34.1*	*49.0*	*51.7*	*42.7*	*35.8*	*102.2*	***659.4***	***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	16.6	0.0	0.0	0.7	0.0	0.0	0.0	**18.0**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.6	1.8	6.6	1.6	**17.9**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	5.2	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**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	7.2	2.9	34.2	**51.5**	**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	10.7	0.8	**11.8**	**1.0%**
Other main stores outside survey area	11.5	5.8	24.6	2.0	15.0	5.8	3.1	3.5	10.0	18.4	16.3	84.1	**200.0**	**16.7%**
Sub-total, stores outside survey area (C)	*14.6*	*9.8*	*24.9*	*2.1*	*15.9*	*27.6*	*3.2*	*3.8*	*18.4*	*27.5*	*36.5*	*120.8*	***304.9***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**47.8**	**95.6**	**182.1**	**38.0**	**35.9**	**39.4**	**37.3**	**52.8**	**70.0**	**70.2**	**72.3**	**223.0**	**964.4**	***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	**2.5**	**0.2%**
Local shops, elsewhere in survey area (outside E&E Borough)	0.0	2.0	3.6	1.0	0.4	0.9	1.0	1.5	2.6	1.0	3.2	3.9	**21.3**	**1.8%**
Total for local shops (D)	**1.8**	**2.6**	**3.8**	**1.0**	**0.4**	**0.9**	**1.4**	**1.5**	**2.6**	**1.0**	**3.2**	**3.9**	**24.2**	**2.0%**
Total (A+B+C+D)	**150.1**	**151.1**	**191.2**	**45.9**	**38.0**	**41.8**	**43.8**	**58.0**	**73.2**	**78.8**	**78.0**	**246.2**	**1,196.1**	**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	**157.2**	**157.6**	**199.1**	**47.9**	**39.8**	**43.3**	**45.4**	**59.6**	**75.1**	**81.8**	**80.3**	**256.1**	**1,243.2**	**100.0**
Convenience goods floorspace in Epsom & Ewell (main stores)														
Epsom town centre														
Waitrose, Ashley Centre	10.4	0.3	0.5	0.8	0.1	0.3	0.5	0.8	0.1	0.0	0.1	0.0	**13.8**	**1.1%**
Marks & Spencer, Ashley Centre	3.6	0.0	0.0	0.0	0.2	0.4	1.0	0.3	0.2	0.7	0.2	0.5	**7.2**	**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	**5.4**	**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	1.1	**1.8**	**0.1%**
Sub-total, Epsom town centre stores	*16.3*	*2.6*	*4.2*	*0.8*	*0.8*	*0.7*	*1.5*	*1.1*	*0.3*	*0.7*	*0.3*	*1.6*	***30.9***	***2.5%***
Ewell district centre														
Sainsbury's Local, Cheam Road	1.4	1.6	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*	*2.3*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.5*	***6.0***	***0.5%***
Stoneleigh district centre														
Sainsbury's Local, Broadway	0.0	9.7	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**11.0**	**0.9%**
Co-Op, Broadway	0.0	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.3**	**0.5%**
Sub-total, Stoneleigh district centre stores	*0.0*	*16.0*	*0.0*	*0.4*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*0.9*	***17.2***	***1.4%***
Kingston Road local centre														
Aldi, Kingston Road	10.7	12.2	1.0	0.7	0.0	0.0	1.1	0.2	0.0	1.1	0.6	14.6	**42.3**	**3.4%**
Co-op, Kingston Road	1.1	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	*11.8*	*14.2*	*1.0*	*0.9*	*0.0*	*0.0*	*1.1*	*0.2*	*0.0*	*1.1*	*0.9*	*14.6*	***45.9***	***3.7%***
Chessington Road (Green Lanes) local centre														
Co-Op, Chessington Road	4.1	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	1.1	**6.3**	**0.5%**
Ruxley Lane (Gatley Avenue) local centre														
Tesco Express, Ruxley Lane	2.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	**3.5**	**0.3%**
Other stores (not within a defined centre)														
Sainsbury's, Kiln Lane, Epsom	55.6	16.7	0.0	5.0	1.0	0.8	2.7	2.4	0.3	5.2	1.4	0.9	**91.9**	**7.4%**
Co-Op, Ruxley Lane, West Ewell	5.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**0.5%**
Tesco Express, Esso PFS, Reigate Road, Epsom	3.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**3.4**	**0.3%**
Tesco Express, Horton Retail Centre, Epsom	3.8	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**5.7**	**0.5%**
Sub-total, other stores in Epsom & Ewell (excluding local shops)	*67.4*	*18.9*	*0.3*	*5.0*	*1.0*	*0.8*	*2.7*	*2.4*	*0.3*	*5.3*	*1.4*	*1.3*	***106.7***	***8.6%***
Total for Epsom & Ewell Borough (A)	**105.2**	**55.2**	**5.5**	**7.3**	**1.8**	**1.5**	**5.3**	**3.8**	**0.6**	**7.8**	**2.6**	**20.1**	**216.7**	**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	**157.2**	**157.6**	**199.1**	**47.9**	**39.8**	**43.3**	**45.4**	**59.6**	**75.1**	**81.8**	**80.3**	**256.1**	**1,243.2**	**100.0**
Convenience goods floorspace outside Epsom & Ewell Borough														
Other main stores in survey area														
Waitrose, Worcester Park (zone 2)	0.6	10.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	**13.3**	**1.1%**
Sainsbury's Local, Worcester Park (zone 2)	0.0	7.7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	**8.2**	**0.7%**
Asda, St Nicholas Way, Sutton (zone 3)	0.7	2.9	14.5	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	**19.2**	**1.5%**
Morrisons, High Street, Sutton (zone 3)	0.0	1.4	21.1	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**23.3**	**1.9%**
Sainsbury's, High Street, Sutton (zone 3)	0.2	2.3	30.7	0.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**34.2**	**2.8%**
Sainsbury's, London Road, North Cheam (zone 3)	1.7	33.8	22.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.0	**68.8**	**5.5%**
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.8	7.1	29.8	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	**43.4**	**3.5%**
Waitrose, Banstead (zone 4)	4.3	3.6	2.1	13.5	5.2	1.9	2.7	0.0	0.0	0.0	0.0	0.0	**33.4**	**2.7%**
Asda, Burgh Heath (zone 7)	12.2	0.0	3.5	14.5	9.7	2.6	16.0	0.8	1.0	1.7	0.4	0.0	**62.3**	**5.0%**
Sainsbury's, Swan Centre, Leatherhead (zone 7)	0.0	0.0	0.0	0.0	0.2	0.1	5.3	6.9	10.3	0.3	0.0	0.0	**23.1**	**1.9%**
Lidl, North Street, Leatherhead (zone 8)	3.0	0.0	0.0	0.0	0.0	0.2	0.4	6.5	6.7	0.0	0.0	0.0	**16.8**	**1.4%**
Tesco, Oxshott Road, Leatherhead (zone 8)	2.1	0.0	0.0	0.0	0.0	0.5	3.0	20.8	13.9	4.6	0.5	0.0	**45.3**	**3.6%**
M&S Foodhall, Ashtead (zone 8)	1.6	0.0	0.0	0.0	0.0	0.0	0.2	5.5	0.5	0.0	0.0	0.0	**7.8**	**0.6%**
Tesco Express, Ashtead (zone 8)	0.5	0.0	0.0	0.0	0.0	0.0	0.1	6.7	0.0	0.0	0.2	0.0	**7.5**	**0.6%**
Waitrose, Esher (zone 11)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	10.4	0.0	**16.6**	**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	25.4	**30.1**	**2.4%**
Waitrose, Surbiton (zone 12)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	7.7	18.8	**32.9**	**2.6%**
Other main stores in survey area (outside E&E Borough)	7.1	19.9	39.7	6.3	5.2	7.1	7.7	3.4	20.2	21.8	16.2	44.3	**198.8**	**16.0%**
Sub-total, other stores in survey area (B)	*34.8*	*89.4*	*163.6*	*37.5*	*20.9*	*12.3*	*35.4*	*50.4*	*53.0*	*44.3*	*36.9*	*106.3*	***684.9***	***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	17.2	0.0	0.0	0.7	0.0	0.0	0.0	**18.6**	**1.5%**
Sainsbury's, Bridge Way, Cobham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.8	1.9	6.8	1.7	**18.5**	**1.5%**
Sainsbury's, London Road, Redhill	0.0	0.0	0.0	0.0	0.5	5.4	0.0	0.0	0.0	0.0	0.0	0.0	**5.9**	**0.5%**
Tesco Extra, Beverley Way, New Malden	3.2	3.9	0.3	0.0	0.0	0.0	0.1	0.0	0.0	7.5	3.0	35.6	**53.6**	**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	11.1	0.9	**12.1**	**1.0%**
Other main stores outside survey area	12.0	6.1	25.7	2.1	15.7	6.0	3.2	3.6	10.3	19.1	16.7	87.5	**207.8**	**16.7%**
Sub-total, stores outside survey area (C)	*15.3*	*10.2*	*26.0*	*2.2*	*16.6*	*28.6*	*3.3*	*3.9*	*18.8*	*28.6*	*37.5*	*125.7*	***316.6***	***25.5%***
Total for stores outside Borough & survey area (B+C)	**50.1**	**99.7**	**189.6**	**39.7**	**37.5**	**40.9**	**38.7**	**54.3**	**71.8**	**72.9**	**74.4**	**231.9**	**1,001.5**	***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	3.8	1.0	0.4	0.9	1.1	1.5	2.7	1.1	3.3	4.1	**22.1**	**1.8%**
Total for local shops (D)	**1.9**	**2.7**	**4.0**	**1.0**	**0.4**	**0.9**	**1.4**	**1.5**	**2.7**	**1.1**	**3.3**	**4.1**	**25.1**	**2.0%**
Total (A+B+C+D)	**157.2**	**157.6**	**199.1**	**47.9**	**39.8**	**43.3**	**45.4**	**59.6**	**75.1**	**81.8**	**80.3**	**256.1**	**1,243.2**	**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)	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**

*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
Lidl, Upper High Street, Epsom	17/00001/FUL	-	1,427	80%	1,142	12,000	13.7	13.8	14.1	14.3

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; 0.3% 2023-40 (source: Experian Retail Planner 18, October 2020, 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

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

	2019	2022	2027	2032
Residents Spending in Epsom & Ewell Borough (£m)	191.9	199.7	207.5	216.7
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	11,730	11,907
Sales from existing floorspace (£m)	191.9	109.2	110.9	112.5
Sales from committed floorspace (£m)	0.0	13.8	14.1	14.3
Residual spending to support new convenience goods floorspace (£m)	0.0	76.6	82.6	89.9
Sales per sq.m net in new shops (£)	12,000	12,125	12,308	12,494
Capacity for new floorspace (sq.m net)	**0**	**6,317**	**6,712**	**7,193**
Capacity for new floorspace (sq.m net, rounded)	**0**	**6,300**	**6,700**	**7,200**

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; 0.3% 2023-40 (source: Experian Retail Planner 18, October 2020, Figure 3a)

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	147.2	153.4	160.4
Existing convenience shop floorspace within Epsom & Ewell Borough (sq.m net)	9,451	9,451	9,451	9,451
Sales per sq.m net £	14,948	11,556	11,730	11,907
Sales from existing floorspace (£m)	141.3	109.2	110.9	112.5
Sales from committed floorspace (£m)	0.0	13.8	14.1	14.3
Residual spending to support new convenience goods floorspace (£m)	0.0	24.2	28.5	33.6
Sales per sq.m net in new shops (£)	12,000	12,125	12,308	12,494
Capacity for new floorspace (sq.m net)	**0**	**1,992**	**2,314**	**2,692**
Capacity for new floorspace (sq.m net, rounded)	**0**	**2,000**	**2,300**	**2,700**

Sales density of -2.0% 2019; 5.4% 2020; -4.8% 2021; 0.7% 2022; 0.3% 2023-40 (source: Experian Retail Planner 18, October 2020, Figure 3a)

Appendix 2

Comparison Goods Floorspace Need

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021 | Comparison Floorspace Need

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	32.8%	1,616	3,311
2022	4,984	37.8%	1,884	3,100
2027	5,822	41.1%	2,393	3,429
2032	6,717	42.7%	2,868	3,849

Expenditure growth rates: 2020: -8.5%; 2021: 6.5%; 2022: 3.8%; 2023-2027: 3.0%; 2028-2040: 2.9%

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

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	201.72	204.60	259.05	62.46	51.49	56.56	59.73	79.97	101.61	106.99	107.30	333.98	**1,625.45**
2027	236.10	237.73	300.79	72.29	59.85	65.78	68.85	91.18	115.19	123.94	122.72	387.31	**1,881.73**
2032	277.50	278.09	351.44	84.57	70.18	76.47	80.14	105.21	132.62	144.38	141.76	451.99	**2,194.37**
Change 2019-32	*69.91*	*66.92*	*84.42*	*19.74*	*16.94*	*17.93*	*18.15*	*21.34*	*25.67*	*33.47*	*29.67*	*106.67*	***510.84***

Source: Tables 1 & 2

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	**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%
Sub-total	*2.2*	*7.4*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*10.0*	*0.6%*
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%
Sub-total	*28.8*	*9.8*	*0.1*	*1.5*	*1.7*	*0.8*	*1.7*	*0.9*	*0.4*	*2.8*	*0.1*	*1.0*	*49.6*	*2.9%*
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%
Ashtead 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

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	**201.7**	**204.6**	**259.1**	**62.5**	**51.5**	**56.6**	**59.7**	**80.0**	**101.6**	**107.0**	**107.3**	**334.0**	**1,625.5**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	75.2	28.8	2.7	8.7	2.9	4.0	16.5	17.1	5.0	4.9	2.1	3.8	171.7	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%
Sub-total	*2.2*	*7.2*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*9.7*	*0.6%*
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%
Sub-total	*28.0*	*9.5*	*0.1*	*1.5*	*1.6*	*0.7*	*1.6*	*0.9*	*0.4*	*2.7*	*0.1*	*0.9*	*48.1*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**107.4**	**47.2**	**2.9**	**10.2**	**5.3**	**4.7**	**18.5**	**18.0**	**5.4**	**7.6**	**2.2**	**4.7**	**234.1**	**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	36.0	117.0	11.1	5.8	0.3	1.1	3.1	1.0	0.8	0.0	23.2	203.4	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	10.2	11.3	0.0	0.0	0.0	29.1	1.8%
Ashtead 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	5.8	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 E&E 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**	**63.6**	**143.0**	**27.9**	**15.8**	**20.8**	**17.8**	**31.8**	**35.3**	**15.1**	**16.4**	**54.3**	**456.4**	**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	55.6	58.7	135.2	412.2	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	106.5	6.6%
New Malden retail warehousing	14.9	16.4	10.9	1.1	0.4	0.1	0.6	2.3	0.9	18.9	8.3	61.0	135.8	8.4%
Other	5.9	12.1	31.8	3.0	9.0	8.7	3.5	6.1	13.6	4.8	13.8	57.4	169.7	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**78.8**	**91.3**	**112.7**	**24.1**	**29.7**	**30.5**	**23.5**	**30.2**	**60.6**	**83.1**	**88.6**	**274.2**	**927.3**	**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)	**201.7**	**204.6**	**259.1**	**62.5**	**51.5**	**56.6**	**59.7**	**80.0**	**101.6**	**107.0**	**107.3**	**334.0**	**1,625.5**	**100.0%**

Source: Table 3, Table 4

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	**236.1**	**237.7**	**300.8**	**72.3**	**59.9**	**65.8**	**68.8**	**91.2**	**115.2**	**123.9**	**122.7**	**387.3**	**1,881.7**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	88.0	33.4	3.1	10.0	3.4	4.6	19.1	19.5	5.7	5.7	2.5	4.4	199.3	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	5.7	0.3%
Stoneleigh (Broadway) (zone 2)	0.5	5.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	0.3%
Sub-total	*2.6*	*8.4*	*0.1*	*0.0*	*0.0*	*0.0*	*0.2*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*11.3*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.4	2.0	0.0	0.1	0.8	0.0	0.2	0.0	0.1	0.0	0.0	0.0	5.5	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	5.9	2.5	0.0	0.5	0.3	0.6	0.5	0.5	0.4	0.1	0.0	0.0	11.3	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	20.1	4.0	0.0	0.6	0.0	0.1	0.5	0.5	0.0	2.6	0.0	1.1	29.5	1.6%
Homebase, Reigate Road, Ewell	6.8	4.5	0.1	0.6	1.6	0.1	0.9	0.0	0.1	0.5	0.1	0.0	15.3	0.8%
Sub-total	*32.8*	*11.0*	*0.1*	*1.7*	*1.9*	*0.9*	*1.9*	*1.0*	*0.4*	*3.1*	*0.1*	*1.1*	*56.0*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**125.7**	**54.8**	**3.3**	**11.8**	**6.1**	**5.5**	**21.3**	**20.5**	**6.1**	**8.9**	**2.5**	**5.4**	**272.1**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	9.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	10.5	0.6%
Cheam district centre (zone 2)	0.4	6.5	3.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.3	0.5%
Sutton town centre (zone 3)	4.6	41.9	135.8	12.8	6.7	0.3	1.3	3.6	1.1	1.0	0.0	26.9	236.1	12.5%
Banstead town centre (zone 4)	1.2	1.0	0.0	12.9	4.1	0.4	1.4	0.1	0.0	0.0	0.0	0.4	21.4	1.1%
Reigate town centre (zone 5)	0.5	0.1	0.4	1.0	1.2	19.2	1.2	0.2	1.8	0.0	0.0	0.4	26.0	1.4%
Leatherhead town centre (zone 7)	0.8	0.0	0.0	0.4	0.0	0.1	7.4	11.7	12.8	0.0	0.0	0.0	33.3	1.8%
Ashtead village centre (zone 8)	0.5	0.0	0.0	0.1	0.0	0.0	0.8	11.8	1.3	0.0	0.0	0.0	14.5	0.8%
Bookham district centre (zone 9)	0.0	0.0	0.9	0.0	0.2	0.0	0.0	0.0	6.4	0.0	0.0	0.0	7.5	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.5	1.5	6.8	0.0	1.8	1.9	12.4	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	2.5	4.5	0.0	7.1	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	5.0	5.6	24.0	35.2	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.1	1.9	0.0	0.5	1.2	1.5	1.8	1.7	2.8	6.0	6.4	3.2	30.0	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.1	3.6	10.1	2.4	0.9	0.1	0.7	0.0	0.0	0.0	0.0	1.2	20.2	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	6.8	3.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	14.2	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	2.7	8.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.8	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	3.5	0.0	0.5	2.0	3.7	0.6	4.0	0.3	0.6	0.4	0.0	0.0	15.7	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.4	0.0	2.8	0.1	0.2	2.0	1.2	5.3	6.3	2.6	0.4	0.2	22.6	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**17.1**	**73.9**	**166.0**	**32.3**	**18.4**	**24.2**	**20.5**	**36.3**	**40.1**	**17.4**	**18.7**	**63.0**	**527.9**	**28.1%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	48.1	57.2	28.7	7.9	4.3	2.5	9.2	15.2	15.7	64.4	67.1	156.8	477.0	25.3%
Guildford town centre	2.5	0.4	0.0	1.4	0.2	2.2	3.7	4.8	32.6	1.4	1.4	2.1	52.7	2.8%
Central London / City of London	4.3	2.9	1.2	1.4	1.9	1.0	2.3	1.9	0.1	1.4	5.2	4.7	28.2	1.5%
Croydon town centre	0.8	1.5	2.7	3.0	4.5	0.5	0.7	0.6	0.0	0.0	0.0	1.4	15.8	0.8%
Redhill town centre	0.6	0.0	0.0	0.4	1.5	12.5	0.6	0.0	0.2	0.0	0.0	0.0	15.9	0.8%
Crawley town centre	0.1	0.0	0.0	0.0	0.5	3.4	0.9	0.0	0.2	0.0	0.8	0.0	5.9	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	11.6	11.0	48.7	9.0	10.6	3.1	4.7	2.5	3.5	1.7	1.5	15.8	123.6	6.6%
New Malden retail warehousing	17.4	19.1	12.6	1.3	0.5	0.1	0.7	2.6	1.0	21.9	9.5	70.7	157.5	8.4%
Other	6.9	14.0	36.9	3.5	10.5	10.1	4.0	6.9	15.4	5.5	15.8	66.6	196.3	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**92.3**	**106.1**	**130.8**	**27.8**	**34.5**	**35.5**	**27.0**	**34.4**	**68.7**	**96.3**	**101.3**	**318.0**	**1,072.8**	**57.0%**
Local / other shops in survey area (D)	1.1	2.8	0.6	0.3	0.9	0.6	0.0	0.0	0.3	1.4	0.1	0.8	8.9	0.5%
Overall total (A+B+C+D)	**236.1**	**237.7**	**300.8**	**72.3**	**59.9**	**65.8**	**68.8**	**91.2**	**115.2**	**123.9**	**122.7**	**387.3**	**1,881.7**	**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	**277.5**	**278.1**	**351.4**	**84.6**	**70.2**	**76.5**	**80.1**	**105.2**	**132.6**	**144.4**	**141.8**	**452.0**	**2,194.4**	***100.0***
Comparison goods floorspace in Epsom & Ewell Borough														
Town centres														
Epsom town centre (zone 1)	103.5	39.1	3.6	11.7	3.9	5.4	22.2	22.5	6.5	6.7	2.8	5.1	233.0	10.6%
District centres														
Ewell Village (zone 1)	2.4	3.9	0.1	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	6.7	0.3%
Stoneleigh (Broadway) (zone 2)	0.6	5.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.3%
Sub-total	*3.0*	*9.8*	*0.1*	*0.0*	*0.0*	*0.0*	*0.3*	*0.0*	*0.0*	*0.0*	*0.0*	*0.0*	*13.2*	*0.6%*
Local centres														
All local centres in Epsom & Ewell Borough (zones 1/2)	2.8	2.3	0.0	0.1	1.0	0.0	0.2	0.0	0.1	0.0	0.0	0.0	6.4	0.3%
Out-of-centre														
Kiln Lane retail warehousing, Epsom	6.9	3.0	0.0	0.6	0.3	0.7	0.6	0.6	0.4	0.1	0.0	0.0	13.2	0.6%
Sainsbury's, Kiln Lane, Epsom (includes in-store Argos & Habitat)	23.6	4.7	0.0	0.7	0.0	0.2	0.6	0.5	0.0	3.1	0.0	1.3	34.6	1.6%
Homebase, Reigate Road, Ewell	8.0	5.3	0.2	0.7	1.9	0.1	1.0	0.1	0.1	0.5	0.1	0.0	17.9	0.8%
Sub-total	*38.5*	*12.9*	*0.2*	*2.0*	*2.2*	*1.0*	*2.2*	*1.2*	*0.5*	*3.7*	*0.1*	*1.3*	*65.7*	*3.0%*
Sub-total, comparison goods floorspace in Epsom & Ewell Borough (A)	**147.8**	**64.1**	**3.9**	**13.9**	**7.2**	**6.4**	**24.8**	**23.6**	**7.1**	**10.3**	**2.9**	**6.3**	**318.3**	**14.5%**
Comparison goods floorspace elsewhere in survey area (outside Epsom & Ewell Borough)														
Town centres														
Worcester Park district centre (zone 2)	0.0	11.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	12.3	0.6%
Cheam district centre (zone 2)	0.4	7.7	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.1	0.6%
Sutton town centre (zone 3)	5.4	49.0	158.7	15.0	7.9	0.4	1.5	4.1	1.3	1.1	0.0	31.3	275.8	12.6%
Banstead town centre (zone 4)	1.4	1.1	0.0	15.1	4.8	0.5	1.7	0.1	0.0	0.0	0.0	0.5	25.1	1.1%
Reigate town centre (zone 5)	0.6	0.2	0.5	1.2	1.4	22.3	1.4	0.2	2.0	0.0	0.0	0.5	30.3	1.4%
Leatherhead town centre (zone 7)	0.9	0.0	0.0	0.5	0.0	0.1	8.7	13.5	14.8	0.0	0.0	0.0	38.4	1.8%
Ashtead village centre (zone 8)	0.6	0.0	0.0	0.1	0.0	0.0	1.0	13.6	1.5	0.0	0.0	0.0	16.7	0.8%
Bookham district centre (zone 9)	0.0	0.0	1.1	0.0	0.2	0.0	0.0	0.0	7.4	0.0	0.0	0.0	8.7	0.4%
Cobham town centre (zone 9)	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.7	7.8	0.0	2.1	2.2	14.4	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	2.9	5.2	0.0	8.2	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	5.8	6.5	28.0	41.0	1.9%
Other town centres within survey area (outside Epsom & Ewell Borough)	3.6	2.2	0.0	0.5	1.4	1.8	2.1	2.0	3.2	7.0	7.4	3.7	34.9	1.6%
Out-of-centre / retail warehousing														
B&Q, Sutton Court Road, Sutton (zone 3)	1.3	4.2	11.8	2.8	1.1	0.1	0.8	0.1	0.0	0.0	0.0	1.4	23.6	1.1%
Sainsbury's, London Road, North Cheam (zone 3)	0.0	7.9	4.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4	16.6	0.8%
Tesco Extra, Oldfields Road, Sutton (zone 3)	0.0	3.2	9.4	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.6	0.6%
Asda, Reigate Road, Burgh Heath (zone 7)	4.1	0.0	0.6	2.3	4.4	0.7	4.7	0.4	0.7	0.5	0.0	0.0	18.4	0.8%
Other out-of-centre / retail warehousing within survey area (outside E&E Borough)	1.7	0.0	3.3	0.1	0.3	2.3	1.4	6.1	7.3	3.0	0.4	0.2	26.2	1.2%
Sub-total, other comparison goods floorspace in survey area (B)	**20.0**	**86.5**	**194.0**	**37.7**	**21.6**	**28.1**	**23.8**	**41.8**	**46.1**	**20.3**	**21.6**	**73.5**	**615.2**	**28.0%**
Comparison goods floorspace outside survey area														
Town centres														
Kingston-upon-Thames town centre	56.5	66.9	33.5	9.2	5.0	2.9	10.8	17.5	18.0	75.1	77.5	183.0	555.9	25.3%
Guildford town centre	2.9	0.5	0.0	1.6	0.2	2.6	4.3	5.5	37.6	1.6	1.6	2.5	60.9	2.8%
Central London / City of London	5.0	3.4	1.3	1.6	2.3	1.1	2.7	2.2	0.1	1.6	6.0	5.5	32.9	1.5%
Croydon town centre	1.0	1.8	3.2	3.5	5.3	0.6	0.9	0.7	0.0	0.0	0.0	1.6	18.4	0.8%
Redhill town centre	0.7	0.0	0.0	0.5	1.8	14.6	0.8	0.0	0.2	0.0	0.0	0.0	18.5	0.8%
Crawley town centre	0.2	0.0	0.0	0.0	0.5	4.0	1.0	0.0	0.3	0.0	0.9	0.0	6.9	0.3%
Out-of-centre / retail warehousing														
Purley Way retail warehousing, Croydon	13.6	12.8	56.9	10.5	12.4	3.6	5.4	2.9	4.0	1.9	1.7	18.4	144.4	6.6%
New Malden retail warehousing	20.5	22.3	14.7	1.5	0.6	0.2	0.8	3.0	1.2	25.6	11.0	82.5	183.8	8.4%
Other	8.1	16.4	43.2	4.1	12.3	11.8	4.7	8.0	17.7	6.4	18.3	77.7	228.7	10.4%
Sub-total, comparison goods floorspace outside survey area (C)	**108.4**	**124.2**	**152.8**	**32.6**	**40.4**	**41.2**	**31.5**	**39.7**	**79.1**	**112.1**	**117.1**	**371.2**	**1,250.3**	**57.0%**
Local / other shops in survey area (D)	1.2	3.3	0.7	0.4	1.0	0.7	0.0	0.0	0.3	1.6	0.1	1.0	10.4	0.5%
Overall total (A+B+C+D)	**277.5**	**278.1**	**351.4**	**84.6**	**70.2**	**76.5**	**80.1**	**105.2**	**132.6**	**144.4**	**141.8**	**452.0**	**2,194.4**	**100.0%**

Source: Table 3, Table 4. 2017 prices.

Epsom & Ewell Retail & Commercial Leisure Needs Assessment Update 2021
Comparison Floorspace Need

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 / Previous Evidence Base

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	0.8	0.9	1.0
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 need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,625.5	1,881.7	2,194.4
Market Share from Survey Area (%)	11	11	11	11
Comparison goods spending in Epsom town centre (£m)	177.5	171.7	199.3	233.0
Total comparison goods spending (£m)	**177.5**	**171.7**	**199.3**	**233.0**
Existing Retail Floorspace (sq.m net)	26,854	26,854	26,854	26,854
Sales per sqm net (£)	6,611	6,377	7,251	8,365
Sales from Existing Floorspace (£m)	177.5	171.3	194.7	224.6
Sales from Committed Floorspace (£m)	0.0	0.8	0.9	1.0
Residual Spending to support new floorspace (£000)	0.0	-0.4	3.7	7.4
Sales per sq m net in new shops (£)*	8,000	7,717	8,773	10,122
Capacity for new floorspace (sqm net)	0	-50	425	732
Capacity for new floorspace (sq.m net, rounded)	**0**	**-100**	**400**	**700**

Table 8b - Ewell Village district centre floorspace need

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,625.5	1,881.7	2,194.4
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	5.7	6.7
Total comparison goods spending (£m)	**5.0**	**4.7**	**5.7**	**6.7**
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	-0.5	-0.2
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-262	-155	-70
Capacity for new floorspace (sq.m net, rounded)	**0**	**-300**	**-200**	**-100**

Table 8c - Stoneleigh district centre floorspace capacity

	2019	2022	2027	2032
Total Available Expenditure (£m)	1,683.5	1,625.5	1,881.7	2,194.4
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	5.6	6.5
Total comparison goods spending (£m)	**4.9**	**4.8**	**5.6**	**6.5**
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	-0.5	-0.3
Sales per sq m net in new shops (£)*	2,500	2,690	3,058	3,426
Capacity for new floorspace (sqm net)	0	-196	-156	-75
Capacity for new floorspace (sq.m net, rounded)	**0**	**-200**	**-200**	**-100**