Elmbridge Retail and Leisure Needs Assessment

Final Report 2025

Elmbridge Borough Council

11 March 2025

LICHFIELDS

LICHFIELDS

Lichfields is the pre-eminent planning and development consultancy in the UK

We've been helping create great places for over 60 years.

lichfields.uk

68729/01/PW/PW
33183825v2

Contents

Appendices

Glossary

Average sales density/turnover density

The annual average level of trade or turnover achieved per square metre of sales floorspace, which is used to measure the relative trading performance of retail outlets.

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses, but now part of the new Class E.

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies, but now part of the new Class E.

Class A3

Commercial units/premises previously classed as restaurants and cafés, but now part of the new Class E.

Class A4

Commercial units/premises previously classed as public houses and bars, but now classed as Sui Generis.

Class A5

Commercial units/premises previously classed as hot food takeaway outlets but now classed as Sui Generis.

Class D2

Commercial units/premises previously classed as leisure, sport and recreation uses but now classed as Class E, Class F.1 or Sui Generis.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

Overview

1.1 Lichfields has been commissioned by the Elmbridge Borough Council ("the Council") to prepare a Retail and Leisure Needs Assessment. The Council's previous retail study was prepared in 2016.

1.2 The analysis in this report will inform the preparation of the Council's new Local Plan covering the period up to 2040. The study has been prepared to meet the requirements set out in the National Planning Policy Framework (NPPF), the Planning Practice Guidance (PPG).

1.3 The key aims of the Retail and Leisure Need Assessment are to provide an up-to-date and comprehensive understanding of the current health and performance of the retail and leisure offer within the Borough's network of centres and an assessment of current and future need for additional retail and leisure floorspace over the new plan period.

1.4 The scope of work includes the key tasks listed below.

1. A comprehensive assessment of the existing vitality and viability of each of the Borough's centres, including an assessment of the level of competition and choice within centres in line with the requirements of the NPPF.
2. A qualitative and quantitative assessment of the extent to which the current retail and leisure provision in the Borough satisfies the level and nature of consumer demand.
3. An assessment of the impact of large centres outside of the Borough and changes in consumer behaviour on the demand for retail and leisure space in the Borough's centres.
4. A qualitative and quantitative assessment of scale and nature the future of the need for additional retail and leisure floorspace across the Borough over the period to 2040, taking into account changes to population and forecast retail expenditure.
5. An assessment of the capacity of the Borough's existing retail centres to accommodate any projected need or additional floorspace.
6. Assessment of the most appropriate approach to each centre to maintain / improve its vitality and viability.

1.5 The study is expected to provide a robust and up-to-date evidence base to support policies in the new Local Plan. It reflects recent changes to permitted development rights and the use class order. The evidence will inform new policy and the potential need to allocate sites in the new Local Plan, as well as the implications of Brexit and the Covid-19 pandemic.

1.6 The Study seeks to define the approach to planning for main town centre uses in Walton-on-Thames, Cobham, East Molesey, Esher, Hersham and Weybridge.

1.7 At the time of writing, the Council has confirmed[1] that it is minded to withdraw the Regulation 19 Draft Local Plan 2037, which is referenced as the 'former Draft Local Plan'.

[1] https://www.elmbridge.gov.uk/news/2024/draft-local-plan-questions-and-answers

Report structure

1.8 Section 2 of this report provides a summary of current national planning policies and changes to the Use Classes Order introduced in September 2020.

1.9 Section 3 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Elmbridge should reflect these underlying trends.

1.10 Section 4 examines the existing hierarchy of centres within the Borough and the surrounding area. Appendix 2 provides more detailed centre health checks and audits for the six main designated centres in the Borough, as follows:

1 Walton-on-Thames

2 Cobham

3 East Molesey

4 Esher

5 Hersham

6 Weybridge.

1.11 Section 5 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 3, 4 and 5.

1.12 Section 6 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.

1.13 Section 7 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).

1.14 Section 8 summarises the main conclusions and recommendations.

2.0 Policy and Legislation

National Planning Policy Framework

2.1 The latest version (December 2024) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates planning policies should:

- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.3 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost-of-living crisis has elevated this debate. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a broader mix of uses within town centre will become increasingly important i.e. leisure and services as well as retail. It is widely recognised that a broader mix of uses can extend activity throughout the daytime and into the evenings.

Changes to the Use Classes Order

2.4 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

2.5 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

2.6 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

2.7 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

2.8 Other potential non-retail town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling uses such as pub/bars and takeaways that may have an impact on nearby residential amenity, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

2.9 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.

2.10 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies. However, to date there is limited evidence either nationally or locally that there has been an upturn in out-of-centre retail uses occupying employment or leisure buildings.

2.11 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government published an amendment to the General Permitted Development Order in March 2024.

2.12 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development (PD) rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.13 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units have been falling over the past decade.

2.14 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.15 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class MA PD right falls away.

2.16 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA is amended to remove the floorspace upper limit for buildings changing use under the right.

2.17 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.18 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

2.19 Many Local Authorities have introduced Article 4 Directions as a mechanism to protect town centres, but removing some of the PD rights. These Article 4 Directions are usually focused on a specific area rather than across the entire town centre.

Local Strategies

2.20 The Council adopted the Elmbridge Vision 2030[2] in 2023. Created alongside residents, businesses, and councillors, the Vision sets priorities and targets for vibrant towns and villages at the heart of plans for a thriving Borough.

2.21 The Enterprise Elmbridge Economic Strategy 2023-2026[3] draws together the priorities from Vision 2030 and Elmbridge Cabinet's Future High Streets Working Group4.

2.22 The Council's Future High Streets Working Group was set up in March 2019, comprising the Council, businesses, landlords, agents, and business groups with input from the Institute of Place Management. The working group was tasked with reviewing the changing nature of high streets and how the Council as a community leader, landlord and planning authority could work with town and village centre stakeholders, partners and businesses to help high streets evolve and adapt to the changing nature of the economy, consumers and businesses.

2.23 The Future High Streets report delivered in March 2020 set out a vision for town and village centres to continue to evolve and adapt into community hubs where retail is no longer the dominant use but part of a wider range of balanced uses including social, economic, leisure, arts, services and housing to create spaces that encourage and support a vibrant community.

2.24 The recommendations and themes from the Enterprise Elmbridge Strategy and Future High Streets Working Group have resulted in the establishment of Business Improvement Districts in Cobham and Walton, with BIDS being explored in Weybridge and Esher. Long-term visions are also underway in Esher, Claygate and Hersham. The Enterprise Elmbridge Action Plan provides grant funding for shopfront improvements, e-commerce and greening of businesses along with initiatives to drive footfall and promote local independents.

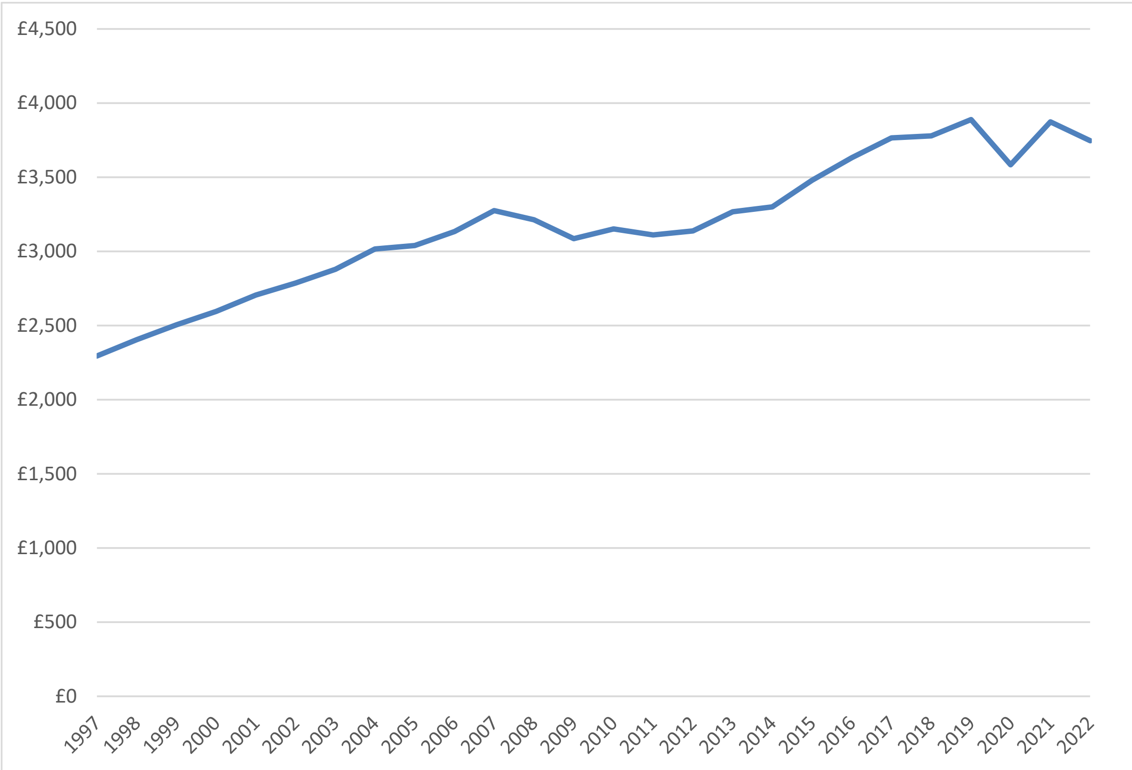
[2] Elmbridge Vision 2030
[3] Enterprise Elmbridge Strategy 2023-2026
[4] Future High Streets Working Group

3.0 # Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

3.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2022 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 comparison goods expenditure growth has been much slower and occupier demand for retail floorspace has reduced significantly, demonstrated by the general reduction in the number of comparison goods shops in town centres (see later in this Section).

Figure 3.1 Comparison goods expenditure average per head in the UK (constant 2019 prices)



Source: Experian Retail Planner Briefing Note 21 (February 2024)

3.2 Experian's latest forecasts suggest slower expenditure growth for both comparison and convenience goods and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2023, 2024 and 2025) for retail and leisure now reflect the expected longer-term effects of Brexit and the Covid-19 pandemic. The current cost-of-living crisis will also suppress expenditure growth in the short term.

3.3 The main implications of Brexit, Covid-19 and the cost-of-living crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short-term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

3.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost-of-living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost-of-living crisis may suppress this recovery.

3.5 In the short-term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.

3.6 Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.

3.7 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels before 2031. The population projections in 2031, and certainly 2036, should not be significantly affected by the Covid-19 and cost-of-living crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer-term projections to alter previous trends to any greater extent. This study has adopted Experian's latest 2022 population estimates, which reflect these trends.

The Impact of Covid-19 lockdowns

3.8 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.

3.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.

3.10 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

3.11 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.

Experian’s latest retail expenditure information

3.12 Experian's Retail Planner Briefing Note 21 (February 2024) suggests non-store retailing's market share increased from 20.4% in 2019 to 30.5% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 25% to 37.9% and convenience good sales increased from 12.9% to 19.2%. However, Experian indicates comparison goods non-store sales figure fell during 2022 down to 31.5%. Convenience goods non-store sales also fell to 16.4%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 3.2.

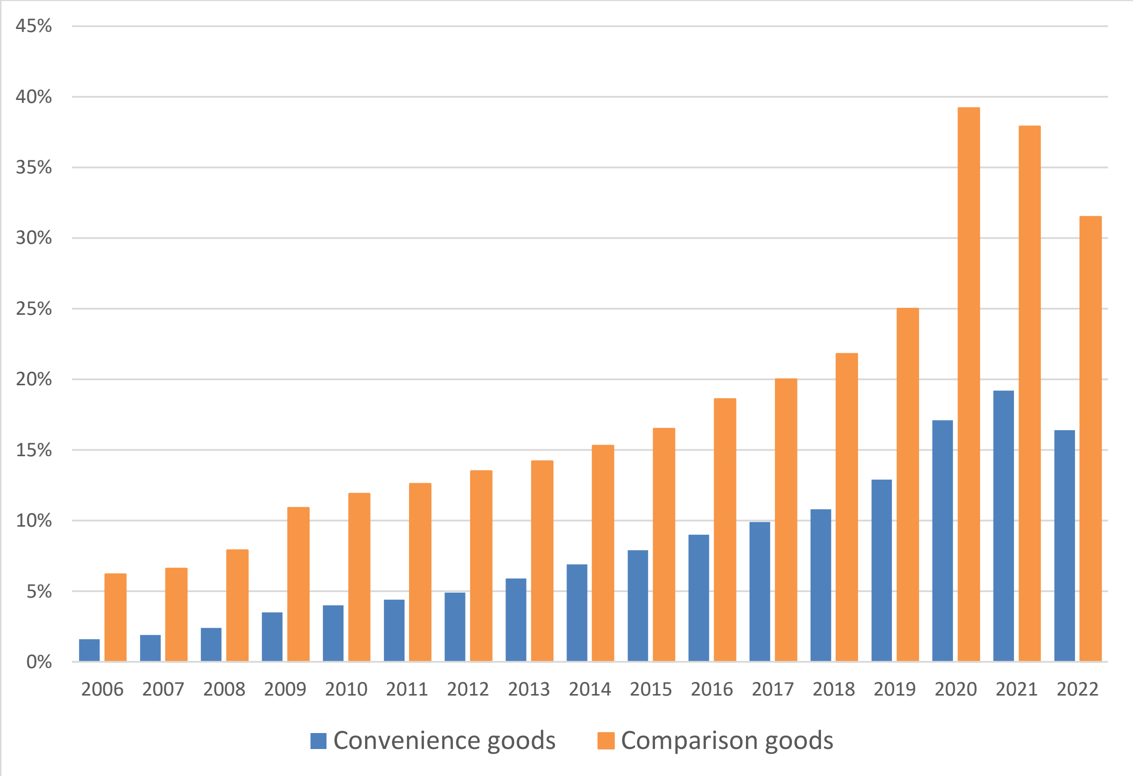
3.13 Between 2006 and 2022 the proportion of comparison goods non-store sales increased by 25.3 percentage points from 6.2% to 31.5%, and the proportion increased by over five times. The proportion of convenience goods non-store sales increased by 14.8 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.6%. The 2024 household survey results in Elmbridge indicate this national trend has been mirrored locally.

3.14 Experian data shows a sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022. Experian’s forecasts suggest a continued reduction during 2023 but steady growth thereafter. Experian’s 2023 forecast figures remain significantly higher than the pre-Covid market shares in 2019.

3.15 ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased fee delivery thresholds may benefit traditional retailing.

3.16 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. It is not appropriate to assume a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 21 (February 2024) – Appendix 3

National expenditure trends

3.17 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 21 – February 2024). The study sets out expenditure projections during five-year intervals up to 2040.

3.18 The current cost-of-living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian forecast a continued decline during 2023 and 2024. Low growth is predicted during 2025 and 2026 but higher growth is expected in the longer-term.

3.19 Planning based on long term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

3.20 For convenience goods, Experian's latest forecasts (February 2024) suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020 and 2021. No expenditure growth is envisaged between 2026 to 2030. In the longer-term limited growth is forecast at 0.1% per annum thereafter. Experian suggests convenience goods sales will settle after 2025, following the post-Covid readjustment. Experian expects most growth in the future will relate to non-store sales. Any need for new convenience goods retail floorspace in the Borough is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

3.21 Comparison goods expenditure per head is predicted to fall by 1.2% during 2024 and increase by 2.7% during 2025. Modest growth is expected in the longer term (between 2.8% to 3.1% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.22 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.

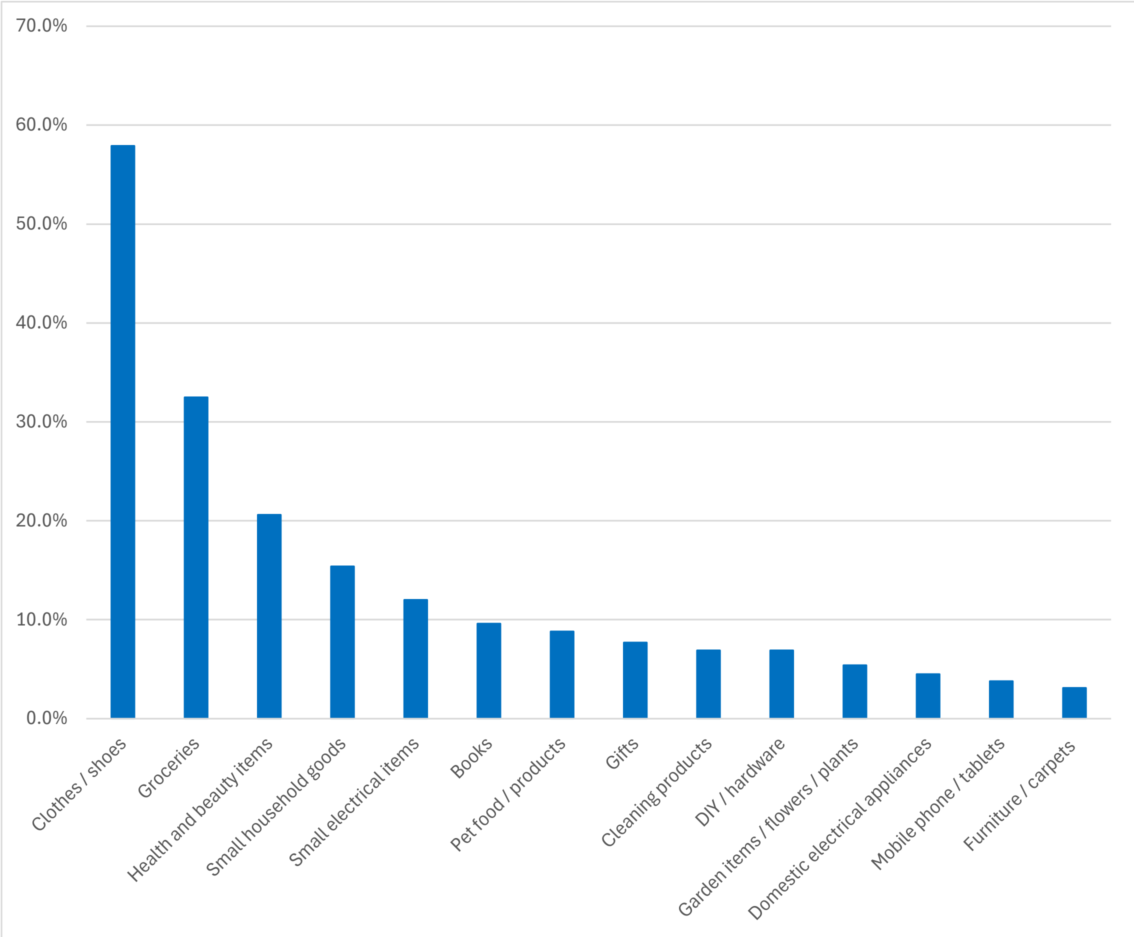
3.23 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Shopping behaviour in Elmbridge

3.24 The household survey results for 1,003 completed interviews during August 2024 across the Elmbridge study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey results suggest 34.8% of respondents do most of their household's non-food shopping on-line and 15.9% of households did their last main food and grocery shop via the internet/delivery.

3.25 The products most regularly purchased by households online are shown in Figure 3.3. Food and grocery items are the second most often purchased on-line. The survey results indicate that a broad range of non-food goods are purchased online, with clothing /footwear and health and beauty items are most often purchased online.

Figure 3.3 Items most (top three) regularly purchased via the internet (% of all households)



Source: Elmbridge NEMS household shopper survey August 2024 (weighted results)

Mode of travel and frequency of trips

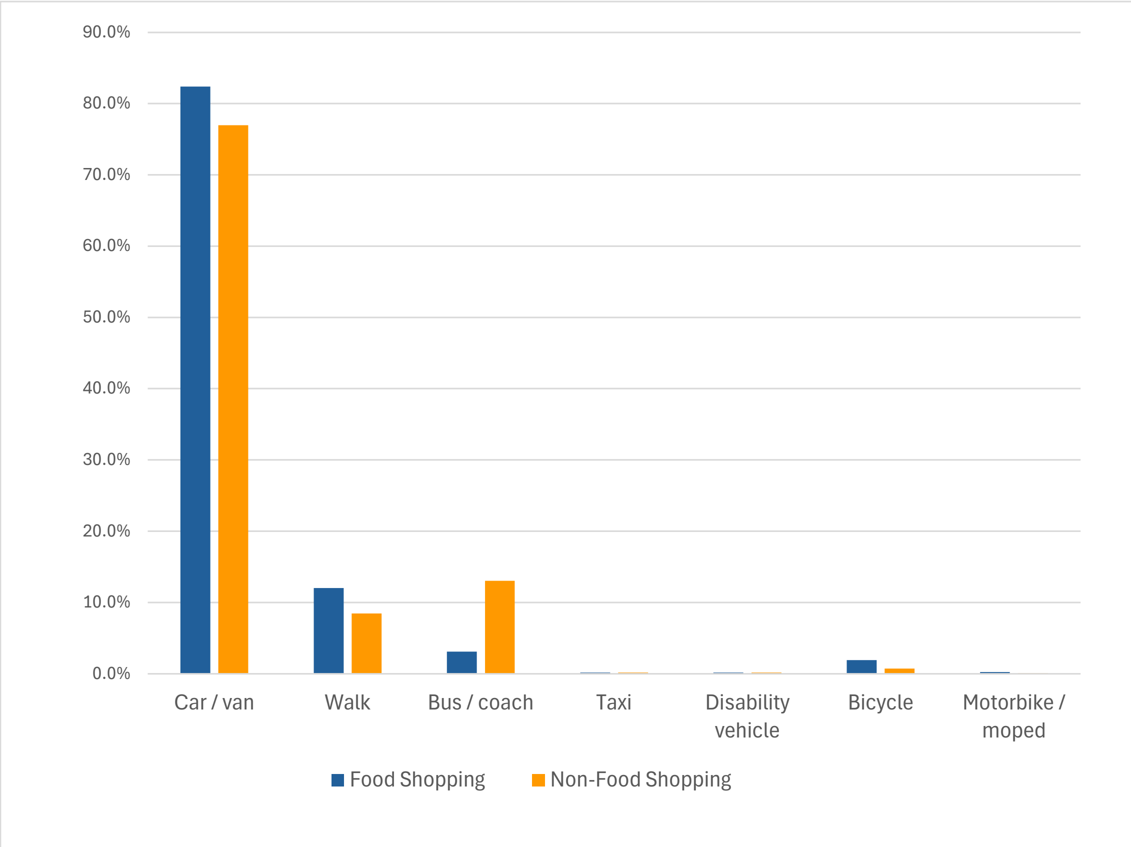
3.26 As indicated above, 34.8% of respondents reported doing most of their non-food shopping online and 15.9% of respondents did their last main food shop online, with Sainsbury's, Tesco and Ocado being the most used operators for home shopping. Experian suggests 24.7% of retail sales was via non-store activity in 2023. The figures suggest many households do not need to travel to undertake food and non-food shopping.

3.27 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.

3.28 Shopping by car as the driver is the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.

3.29 Car usage is generally higher for the main food shopping trip than for non-food shopping trips because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus travel is higher for non-food shopping.

Figure 3.4 Mode of travel for non-food and food shopping (% of travelling household respondents)



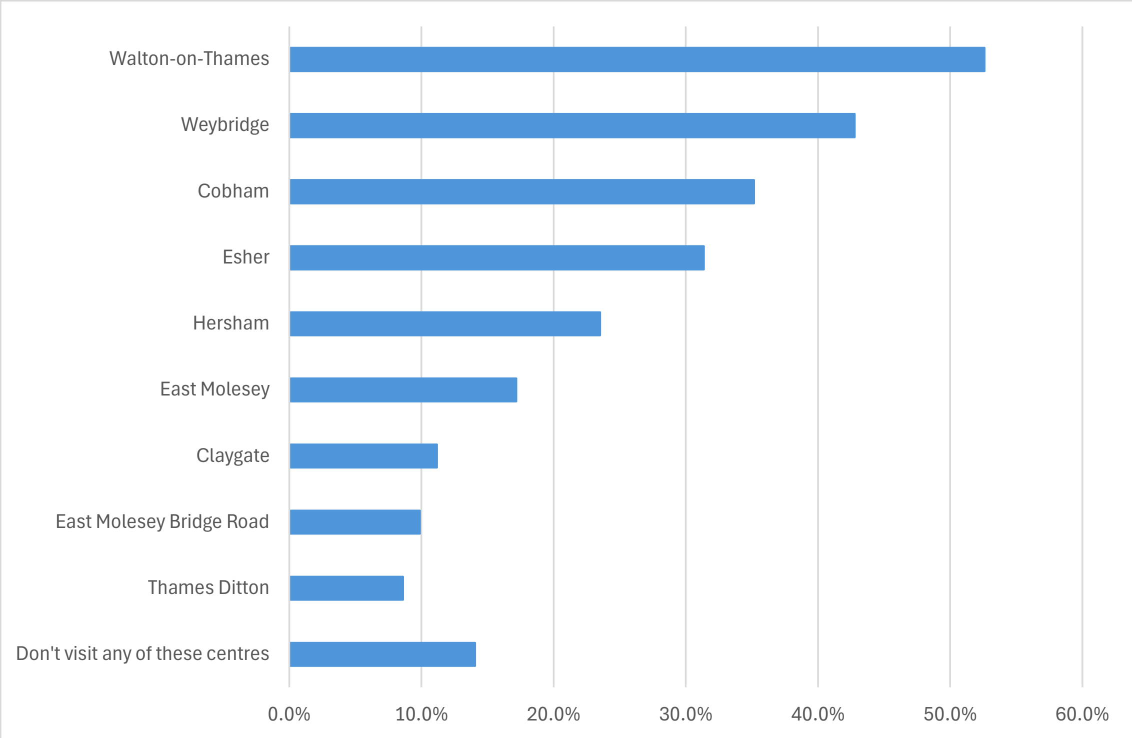
Source: Elmbridge NEMS household shopper survey August 2024 (weighted results).

3.30 Car travel for food and non-food shopping was relatively high across all zones, except for Zone 2 – Walton-on-Thames, where levels of access to shopping facilities are higher on foot and by bus. Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly shopping in urban areas and over 85% in rural areas. Car usage for the main food and grocery shopping trip is generally lower (64%) in Zone 2 – Walton-on-Thames and higher than 80% in most other zones.

Activities undertaken by visitors to Elmbridge's centres

3.31 Respondents to the household survey were asked if they had visited the main centres in the Borough during the daytime or evenings to use the shops, services or leisure facilities in the last year. Walton-on-Thames and Weybridge were the main destinations visited by households in the study area, as shown in Figure 3.5, followed by Cobham. Only 14% of households had not visited any of the main centres in Elmbridge during the last year, mostly households in the three zones outside the Elmbridge i.e. Shepperton, Runnymede and Byfleet. The results indicate many households had visited more than one centre in Elmbridge.

Figure 3.5 Elmbridge's main centres visited by households durnng the last year (% of all study area households)



Source: Elmbridge NEMS household shopper survey August 2024 (weighted results).

3.32 The variety of activities carried out by visitors to the four main centres is shown in Table 3.1.

3.33 The results indicate that most households undertake multiple activities in Elmbridge's four largest centres. Non-food shopping is the most popular activity in the two largest centres in Walton-on-Thames and Weybridge. Esher has a much more limited role for non-food shopping.

3.34 Visiting cafés, pubs and restaurants is significant in all four main centres and is the most popular activity in Cobham and Esher. Food shopping is a key activity in all four main centres, but to a lesser extent in Esher, where leisure activities appear to be more prevalent.

3.35 Shopping remains important to all four centre's overall vitality and viability, but a good range of leisure and non-retail services is important to the role of their overall attraction.

Table 3.1 Actvities carried out by visitors to each centre (% of all visitors to each centre)

Activity	Walton	Cobham	Esher	Weybridge	Average all Centres
Shopping					
Non-food shopping	52.3	37.4	22.6	52.1	**41.1**
Food shopping	48.7	38.1	24.4	39.4	**37.6**
Window shop/ browse	12.6	9.2	5.0	10.0	**9.2**
Visting the market	3.7	0.7	0.0	1.9	**1.6**
Leisure					
Go for a walk	5.6	5.8	1.7	9.2	**5.6**
Café /pub/ restaurant	24.6	48.3	40.7	34.7	**37.0**
Leisure activity	10.5	3.6	36.6	5.4	**14.0**
Other services					
Banks / financial	11.8	1.2	1.5	5.1	**4.9**
Health facilities	6.7	6.9	3.2	9.6	**6.6**
Library	2.7	1.8	2.2	3.9	**2.6**
Post office	3.6	3.4	3.4	2.4	**3.2**
Other service uses	5.5	8.3	6.1	3.6	**5.9**
Other activities					
Travelling to / from work	1.3	1.3	7.4	3.2	**3.3**
Education / school run	0.6	0.0	1.7	0.0	**0.6**
Visting family / friends	4.4	10.8	3.0	5.3	**5.9**

Source: Elmbridge NEMS household shopper survey August 2024 (weighted results).

Demand for town centre uses

3.36 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data for retail, food/beverage and service units) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased back to over 14% in 2023. The current UK vacancy rate is 13.9%. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, the cost-of-living crisis and the growth in on-line shopping. The more recent impact of higher inflation and the cost-of-living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

3.37 Land use information and site visits by Lichfields in September 2024 indicate that there were 98 vacant units in the six assessed main centres – Walton, Weybridge, Cobham, Esher, Hersham and East Molesey. The overall vacancy rate in these centres in the Borough was 13.9% of all shop units. This vacancy rate is similar to the UK average. However, Esher has a relatively high vacancy rate of 19.6%, with other centres below the UK average. This higher figure for Esher appears to be a consequence of the timing of the survey, with a number of units undergoing renovations at the time (and so marked as vacant in accordance with standard practice) or have since been reoccupied. As of January 2025, Esher has an updated vacancy rate of 13.6%.

3.38 The Council's 2023 survey indicated there were 35 vacant units in other centres across the Borough, a lower vacancy rate of 8.4%. The distribution of vacant units and vacancy rates are set out in Table 3.2.

Table 3.2 Vacant shop units in Elmbridge Borough's centres

Centre	Number of vacant units	% of all units
Esher*	22	19.6
Walton-on-Thames	27	13.8
Weybridge	23	14.6
Cobham	14	12.4
East Molesey	7	8.0
Hersham	5	12.2
Main centres sub-total	**105**	**14.8**
Other centres in the Borough	35	8.5
Grand Total	**140**	**12.4**

Source: Elmbridge Borough Council land use surveys 2023 and 2024.
*As set out at paragraph 3.37, an updated count for Esher shows a reduction in vacancies (to 15) and units (110), January 2025

3.39 The underlying increase in vacant units across the UK described earlier is primarily due to the reduction of comparison goods retail outlets. Elmbridge's six main centres have comparable levels of comparison provision to the UK average, indicating consistency with this trend. In some centres, non-retail services have helped to replace some of the vacated comparison goods retail outlets. Elmbridge has above-average provision of non-retail services, which may have prevented a further increased in shop vacancy rate. A more detailed analysis of the mix of uses in the Borough's six main centres compared with the national picture is set out in Appendix 2.

3.40 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost-of-living crisis and will continue in the short-term.

3.41 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf and other sports activities.

Food store operators

3.42 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express / Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

3.43 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased. This trend is less evident in Elmbridge Borough, with most centres served by large supermarkets located in centres. There is small convenience store representation only in some of its centres: Cobham has a Sainsbury's Local, Walton Halfway has a Tesco Express, and Esher has a Tesco Express and Morrisons Daily. There are additional local convenience stores within the Borough's suburbs, generally in the form of newsagents / independent stores, with significant representation of this type of store in East Molesey and East Molesey Bridge Road.

3.44 Several proposed larger food superstores have not been implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller grocery shopping trips rather than bulk food shopping. This trend appears to have increased with homeworking during the pandemic lockdowns and may not return to pre-Covid levels in the future.

3.45 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. This trend is now evident in Elmbridge with an Aldi store in Walton, and Lidl stores in Hersham and Brooklands Retail Park. Home Bargains and B&M have also expanded rapidly in recent years but are not currently represented in Elmbridge.

3.46 The number of small independent food and grocery shops in town centres declined over many years, as the number of large food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers. There is reasonable representation of these specialists in the Borough, particularly in Weybridge and Cobham.

Comparison retailers

3.47 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

3.48 The demand for premises from the bulky goods sector, i.e. furniture, carpets, electrical and DIY, has been particularly weak in recent years. The difficulties recently experienced by Homebase is an example of this trend. This trend has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This downward trend in bulky goods stores has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. There is some representation of the retail warehouse sector in the Borough at Brooklands Retail Park, but other bulky goods stores are located on business parks such as Weybridge Business Park and Hersham Trading Estate. Most of the Borough's retail offer is located in centres rather than retail parks.

3.49 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in the area southwest of London, where the focus of comparison goods national multiples is in Kingston-upon-Thames, Woking and Staines. Walton-upon-Thames does however have a reasonably good range of national multiples.

3.50 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in larger sub-regional and regional centres e.g. Kingston-upon-Thames. Weybridge follows Walton in the hierarchy within Elmbridge Borough, with other centres at the lower levels in the hierarchy where multiple operator demand will continue to be limited in the future. Polarisation of investment in the larger centres is likely to continue, with many retailers reducing their overall number of outlets. Walton has the best prospects for attracting multiple retailers but could lose existing operators if consolidation into the largest regional centres continues.

3.51 The continuation of these trends will influence future operator space requirements in the Borough with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.52 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.53 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in the Borough, with charity and second-hand shops making up 12.3% of units on average, higher than the UK average of around 10%. Walton has the highest proportion at 16.1%, with Weybridge (12.2%), Esher (11.1%) and East Molesey (12.0%) close to the Borough average. Cobham (9.8%) and Hersham (7.7%) have slightly below-average proportions of charity shops.

3.54 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.55 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

3.56 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2023. Many smaller town centres now have no remaining banks/building societies. The 2024 land use surveys indicate there are only seven banks in the six main centres. Across the UK banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is evident in Elmbridge, where Walton has six banks/building societies and Weybridge has the other one bank.

3.57 Banking hubs have emerged and enable major banks to maintain a high street presence whilst reducing costs, with different banks sharing the same unit and operating on different days. This trend has not emerged in the Borough, but this could change in the future. Continued rationalisation of bank and financial services could lead to an increase in town centre vacancies.

3.58 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres. However, these growth trends are not particularly evident in Elmbridge.

3.59 There were only five betting shops in the six main centres surveyed in 2024, accounting for 0.7% of all units, below the UK average of about 1%. There are no obvious over-concentrations of betting shops in the Borough's centres.

3.60 There were 22 hot food takeaways in the six assessed centres, 3.1% of all units, which is below the UK national average of 6.4%. East Molesey had the highest concentration of hot food takeaways, with six outlets (6.9% of all units). Walton has seven outlets, only 3.6% of all units. All other centres had between two and three outlets and were proportionally below the UK average.

3.61 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been supressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular centre land uses surveys. The cost-of-living crisis may increase demand for change from retail to other uses.

The evening economy

3.62 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

3.63 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This hospitality sector in town centres was the most adversely affected by the Covid-19 crisis.

3.64 Restaurants, cafés, sandwich bars and coffee shops are now in the new Use Class E, whilst pubs/bars and hot-food takeaways. In terms of how customers use food and beverage outlets the key categories are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

3.65 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the Borough, and this sector appears to have to some extent recovered following the Covid crisis.

3.66 There were 142 food/beverage outlets in the six assessed main centres in the Borough, 20% of all units, which is slightly below the UK average of 22.2%. However, Elmbridge's main centres have a higher-than-average provision of restaurants/cafés, with 108 units accounting for 15.2% of all units, compared with the UK average of 10.7%. All of the six main centres have above-average provision. Walton and Weybridge having the highest representation (17.9% and 16.6%), and East Molesey has the lowest proportion at 11.5%. The provision of hot food takeaways (22 outlets – 3.1%) is below the UK average (6.4%), with above-average provision only in East Molesey.

3.67 There were 12 pubs/bars (1.7% of all units), which is significantly below the UK average (5.1%). The number of pubs/bars is relatively low in all Elmbridge's main centres. Overall, the evening economy of Elmbridge's centres is focused on restaurants/cafés, with strong representation in this sector.

Pop-up spaces

3.68 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis, but this is not particularly evident in Elmbridge.

Summary

3.69 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. The high proportion of cafés/restaurants in the Borough coupled with a below average vacancy rate suggests that this trend has been successful in Elmbridge, except for Esher which had a higher vacancy rate (19.6%) at the time of the assessment, although this has since fallen to 13.6%. The expansion of the evening economy to increase the provision of restaurants, pubs, bars and other leisure uses may be a good opportunity to reduce vacancies across the Borough.

3.70 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, centres recovered during periods of stronger growth. Many commentators believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

3.71 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

3.72 These national trends have been evident in Borough's centres but the health check assessments in Appendix 2 suggest resilience in most of Elmbridge's centres. One positive sign is the low shop vacancy rates in the Borough, which are generally below the UK average, as well as the rapid change in Esher's vacancy rate from 19.6% in September 2024 to 13.6% by January 2025. An analysis of the mix of uses and the role of centres in Elmbridge is set out in Section 4.0.

3.73 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".

4.0 Hierarchy of centres

National policy

4.1 The NPPF (paragraph 90) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated centres in Elmbridge

4.2 Elmbridge's Core Strategy (2011-2026) identifies three categories of retail centres in policy CS1, 'Spatial Strategy'. This is reinforced by Policy CS18 'Town Centre Uses' which also designates primary and secondary shopping frontage as defined on the proposals map. The current retail hierarchy of centres is as follows:

Town Centre
- Walton-on-Thames

District Centres
- Weybridge
- Cobham
- Esher
- East Molesey
- Hersham

Local Centres
- Claygate
- East Molesey Bridge Road
- Hinchley Wood
- Oxshott
- Oatlands
- Thames Ditton
- Walton Terrace Road
- Walton Halfway
- Weybridge Queens Road

4.3 The Local Plan identifies a range of retail and service centres, from medium sized towns to district and local centres, with additional identification of retail policy to protect the role of each centre to meet the needs of its catchment population as part of a network of centres within the Borough, as described below.

- **Town centres** are usually the principal centre within a Local Authority, functioning as important service centres for extensive rural catchment areas. In Elmbridge, development is encouraged where it adds to the vitality and viability of the centre.
- **District centres** are usually comprised of groups of shops, often with one superstore/ supermarket and a range of non-retail services such as banks, building societies, restaurants, and public facilities such as libraries. The safeguarding and consolidation of their role and function is a key objective in Elmbridge's hierarchy.

- **Local centres** contain a range of local, small shops, serving a small catchment. They typically include a small supermarket, newsagent, sub-post office and a pharmacy amongst other shops. The retail role of these centres is safeguarded and opportunities to consolidate this are promoted, with recognition of their value for day-to-day needs providing accessible services and community facilities.
- Small parades and local shops are also to be protected where they serve a local need, especially for those with limited access to larger centres in the Borough.

4.4 This hierarchy directs growth commensurate with each centre's size, with large scale developments not suitable in local centres. This policy promotes measures to preserve the existing hierarchy, recognising the value of smaller centres for everyday needs whilst directing development to larger centres.

4.5 The improvement and protection of these centres is seen as essential for reducing the need for unnecessary travel to alternative facilities and ensure that the proportion of expenditure going outside the Borough does not increase.

4.6 Areas of Elmbridge lie within the shopping catchment areas of the larger centres for example Kingston, Surbiton, and Woking, influencing shopping patterns across the Borough. Connections to Central London also impact the Borough's spending retention, but to a lesser degree than the nearest destinations. Within the Borough, Walton is the largest centre, followed by Weybridge and Esher. These settlements are concentrated in the northwest and central part of the Borough.

4.7 The former Regulation 19 Draft Elmbridge Local Plan 2037 includes proposed amendments to the current centre hierarchy in Policy ECO3, 'Supporting our town, district, and local centres'. The proposed hierarchy is as follows:

Town Centre
- Walton-on-Thames - no change
- Cobham - upgraded
- Esher - upgraded
- Weybridge - upgraded

District Centres
- East Molesey - no change
- Hersham - no change
- Claygate - upgraded
- East Molesey Bridge Road - upgraded
- Thames Ditton - upgraded

Local Centres
- Hinchley Wood - no change
- Oxshott - no change
- Oatlands - no change
- Walton Terrace Road - no change
- Walton Halfway - no change
- Weybridge Queens Road - no change

4.8 The number of retail, food/beverage and non-retail service outlets in each of the six main centres and other centres is shown in Table 4.1. Walton-on-Thames is the largest centre with a good choice of retail outlets, food/ beverage and service uses. Weybridge is the next largest centre followed by Esher and Cobham. Hersham is the smallest of the six main centres.

Table 4.1 Designated centres in Elmbridge Borough – number of outlets by use

Main centres	Total units	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant units
Walton-on-Thames	**195**	56	8	46	58	27
Weybridge	**157**	49	13	32	40	23
Esher	**118**	27	3	21	38	29
Cobham	**113**	41	11	17	30	14
East Molesey	**87**	25	6	17	32	7
Hersham	**41**	13	1	9	13	5
Sub-Total	**711**	**211**	**42**	**142**	**211**	**105**
% all units	100.0	29.7	5.9	20.0	29.7	14.8
Other centres	Total units	Class E uses				Vacant units
East Molesey Bridge Road	86	79				10
Weybridge Queens Road	74	69				5
Claygate	52	50				3
Thames Ditton	45	24				2
Walton Halfway	45	33				3
Hinchley Wood	30	15				1
Walton Terrace Road	31	27				4
Oatlands	28	26				3
Oxshott	23	9				4
Sub-Total	414	**332**				**35**
Grand-Total	**1,125**	n/a				**140**
% all units	**100.0**	n/a				**12.4**

Source: Elmbridge Borough Council land use surveys 2023 and 2024.
* excluding Class B, office, Class D1/D2 and residential uses.

4.9 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household's non-food shopping. Respondents were also asked which of the main centres in the Borough they had visited to use shops, services and leisure facilities in the last year, and the results are shown in Table 4.2.

4.10 Walton-on-Thames is the main non-food shopping destination in the Borough, followed by Weybridge and Cobham. Brooklands Shopping Centre is also a non-food shopping major destination. The proportion of all respondents in the study area who do most of their non-food shopping at other centres in the Borough is very low (ranging from 0.1% to 0.9%), which reflects their size, limited number of comparison goods shops and limited importance in the wider hierarchy. A high proportion (34.8%) of respondents do most of their non-food shopping via the internet/delivery. Many non-food destinations located outside Elmbridge were mentioned by respondents, including Kingston upon Thames (14.3%), Staines (5.3%), Woking (1.5%), Guildford (1.1%) and Chertsey (1%).

Table 4.2 Destinations used by households (% of all respondents in the study area)

Centre / destination	Visited during the last year	Main non-food shopping destination
Walton-on-Thames	52.6	4.3
Weybridge	42.8	2.6
Cobham	35.2	3.2
Esther	31.4	0.7
Hersham	23.5	0.7
East Molesey	17.2	0.1
Claygate	11.2	0.9
East Molesey Bridge Road	9.9	0.0
Thames Ditton	8.6	0.1
Brooklands Shopping Centre	n/a	5.1

Source: Elmbridge NEMS household shopper survey August 2024 (weighted results)

4.11 The retail and food/beverage capacity assessment set out in Section 4 and in Appendix 2, 3 and 4 estimates the turnover of each centre in 2024, as summarised in Table 4.3.

Table 4.3 Combined turnover of the main centres in Elmbridge Borough – £million 2024

	Total turnover	Comparison goods retail	Convenience goods retail	Food/ beverage
Walton-on-Thames	**180.5**	65.6	59.5	55.3
Cobham	**141.0**	39.9	40.1	61.0
Weybridge	**133.6**	43.5	35.9	54.2
Esher	**88.9**	5.9	32.9	50.1
Hersham	**42.6**	6.2	31.1	5.3
East Molesey	**26.5**	8.1	11.2	7.2
Claygate	**24.9**	2.8	12.1	10.0
Thames Ditton	**18.7**	3.0	2.2	13.5
East Molesey Bridge Road	**12.1**	0.4	n/a	11.7
Oxshott	**7.7**	1.4	1.2	5.1
Hinchley Wood	**3.7**	0.8	1.4	1.5

Source: Table 5 in Appendix 2, 3 and 4.

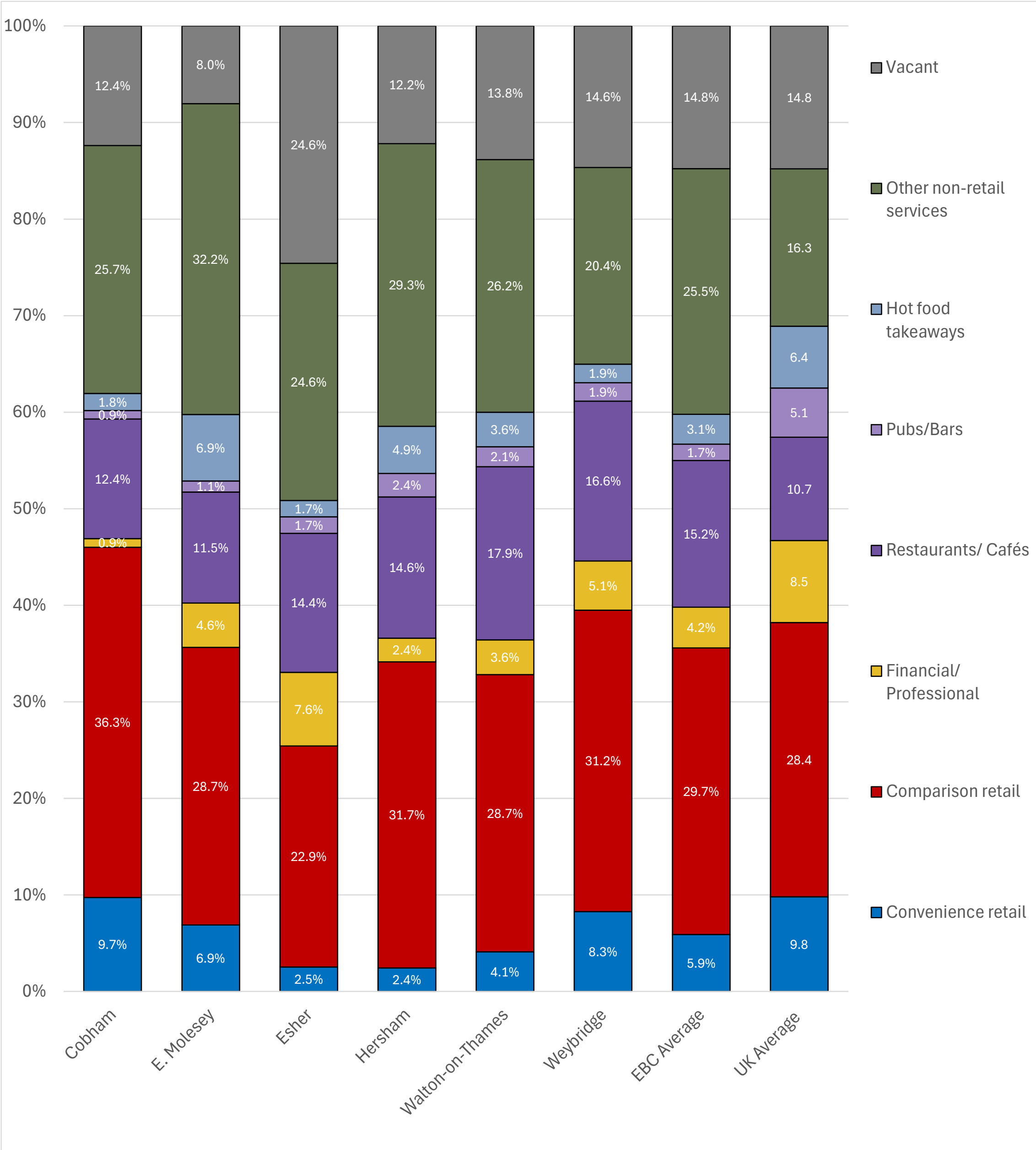
4.12 The proposed upgrading of Weybridge, Cobham and Esher to Town Centres is consistent with their size in terms of number of units (over 100 in total) and their combined retail and food/beverage turnover (over £88 million), when compared with Walton-on-Thames.

4.13 East Molesey and Hersham have a much lower number of units and combined turnover and should remain as 'District Centres'. Claygate, East Molesey Bridge Road and Thames Ditton have a similar number of units as East Molesey and Hersham have a higher turnover than the other Local Centre. These centres should be upgraded to 'District Centre' status due to their scale and turnover, when compared with existing district and local centres.

Diversity of main town centre uses

4.14 Figure 4.1 below shows the composition of the six main centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the average for the six centres and the Goad Plan average for centres across the UK. More detail is provided in the health check analysis in Appendix 2.

Figure 4.1 Mix of retail and service uses - % of all units



Source: Elmbridge Borough Council land use survey 2024 and Experian Goad Plan UK averages.

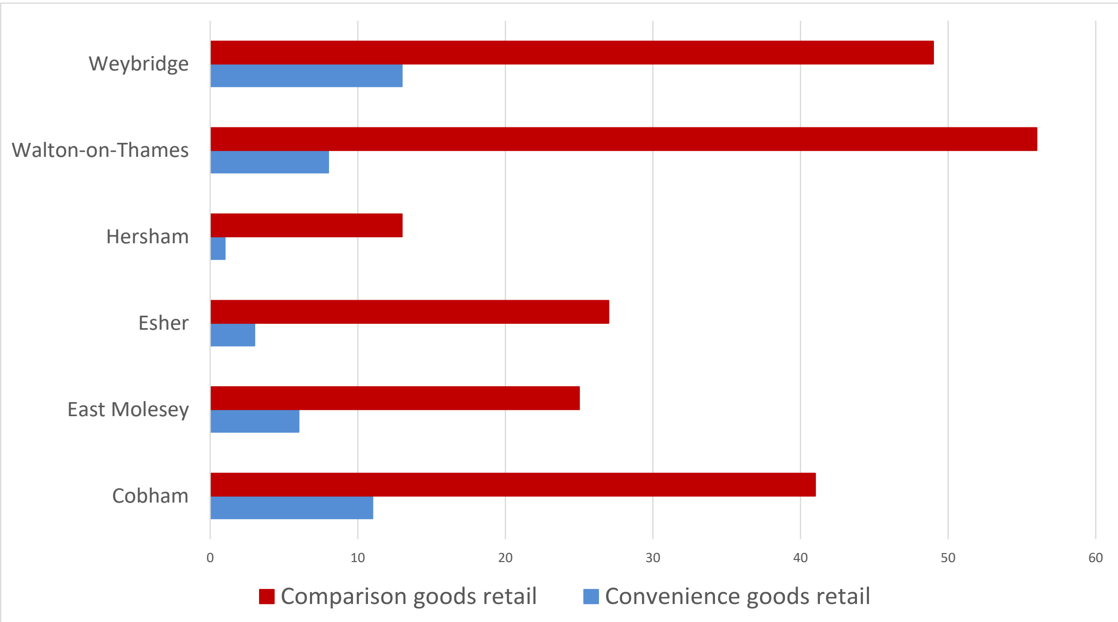
4.15 All centres have a reasonable mix of retail and service uses. The overall mix of use in the Borough's main centres is broadly in line with the UK average, but there are some significant variations. The shop vacancy rate is similar to the national average except a low vacancy rate in East Molesey and a higher rate in Esher.

4.16 All centres have a relatively high proportion of café/restaurants and other non-retail services when compared with the national average, but the provision of pubs/bars and hot-food takeaways is below average. Esher has relatively low proportions of convenience and comparison goods retail. Comparison goods retail provision is above or around average in all other centres. Convenience goods retail provision, in terms of the proportion of all units, is below the UK average in all centres, but particularly low in Hersham and Esher.

Retailer representation

4.17 Figure 4.2 compares the proportion of convenience and comparison retail units within centres. Most of the Borough's comparison and convenience goods retail outlets are focused in Walton-on-Thames, Weybridge and Cobham. These larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. The other smaller centres tend to have a higher proportion of non-retail services, catering for the day-to-day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs. A more detailed analysis of the mix of retail uses in each centre is shown in the centre health checks in the Appendices.

Figure 4.2 Comparison and convenience goods retail outlets (number of units)



Source: Elmbridge Borough Council land use survey 2024.

Service Uses

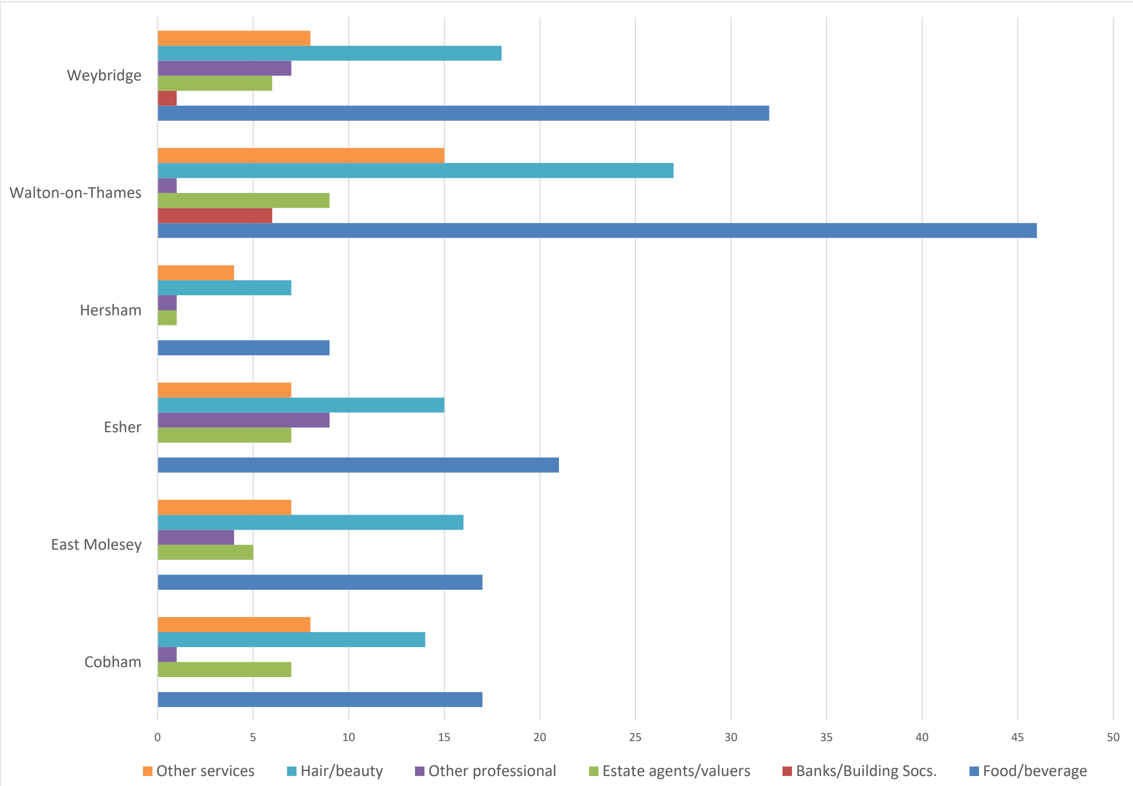
4.18 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 4.3 below summarises the number of outlets in different service categories in the main centres. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways; and

- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.19 Walton-on-Thames and Weybridge have the highest number of food/beverage outlets, particularly restaurants/cafés. The other centres have a relatively strong provision of hairdressers/beauty salons and estate agents. The provision of banks/building societies is concentrated in Walton-on-Thames and Weybridge, consistent with the national trend where banks/building societies tend to concentrate their outlets in the largest centres in local areas. A more detailed analysis of the mix of services uses in each centre is shown in the centre health checks in the Appendices.

Figure 4.3 Distribution of non-retail service uses (number of outlets)



Source: Elmbridge Borough Council land use survey 2024.

Summary

4.20 The analysis of the hierarchy of centres in this section indicates the Borough has a well-established network of centres that serve their respective areas. Walton-on-Thames, Cobham and Weybridge are the main comparison goods shopping destinations. Shop vacancy rates are generally in-line with the national average, but Esher has the highest shop vacancy rate, above the UK average. Identifying the hierarchy of centres in future development plans will be important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and

- identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

4.21 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns. The implications of these factors for future policy and strategy are addressed in later sections of this report.

5.0 Retail and food/beverage capacity

Introduction

5.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses in Elmbridge Borough. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

5.2 All monetary values expressed in this study are at 2022 prices, consistent with Experian's base year expenditure figures for 2022, which are based on actual recorded expenditure levels rather than projections.

Study area zones

5.3 A household telephone survey was undertaken during August 2024. The primary catchment areas of some of the main centres extend beyond the Borough boundary, particularly to the northwest and west. The study area is shown in Appendix 1. This study area has been sub-divided into nine zones based on ward areas to reflect the primary catchment areas of the main centres in the Borough. The Elmbridge Borough area is divided into six zones and the area to the northwest and west of the Borough is divided into three zones.

5.4 The projected population within each zone between 2024 to 2040 is set out in Table 1 in Appendix 3, sourced from Experian. The base year 2024 population within the study area is 224,708. This population is projected to decrease to 223,928 by 2035, a decrease of +0.35%. Population is then projected to increase to 224,099 by 2040.

Retail expenditure

5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2022 have been obtained.

5.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 21 – February 2024) has been used to forecast expenditure within the study area. Experian's short-term growth forecast rates during 2023, 2024 and 2025 reflect current economic circumstances, including Covid-19 and the cost-of-living crisis. The forecast changes during this period are as follows:

- convenience goods: -3.6%
- comparison goods: -1.9%
- leisure: -1.0%

5.7 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022 and 2023. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2023, 2024 and 2025. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector recovered during 2022, but a small decline in forecast during 2023 and 2024. The comparison goods retail sector is expected to decline during 2023 and 2024.

5.8 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted. These longer-term forecast reflect Experian's views on the post Covid and cost-of-living crisis recovery. The growth forecasts are as follows:

- convenience goods: no growth during 2026 to 2030 and +0.1% growth per annum beyond 2030;
- comparison goods: +3.1% per annum growth for 2026 to 2030 and +2.8% per annum beyond 2030; and
- leisure: +1.1% per annum growth for 2026 to 2030 and +0.8% per annum after 2030.

5.9 These growth figures relate to real growth and exclude inflation.

5.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2024 are:

- 5.2% of convenience goods expenditure; and
- 24.3% of comparison goods expenditure.

5.11 Experian's projections suggest that these percentages will increase to 7.2% and 29.3% by 2036, respectively.

5.12 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2036, excluding SFT/on-line sales through non-retail businesses. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.

5.13 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to decrease by 1.9% from £624.2 million in 2024 to £612.36 million in 2040, as shown in Table 3 (Appendix 3).

5.14 Comparison goods spending is forecast to increase by +45.8% between 2024 and 2040, increasing from £775.8 million in 2024 to £1,131.48 million in 2040, as shown in Table 3 (Appendix 4).

5.15 Food and beverage spending is forecast to increase by +14.7% between 2024 and 2040, increasing from £511.82 million in 2024 to £586.8 million in 2040, as shown in Table 3 (Appendix 5).

Growth in Turnover densities

5.16 Experian's Retail Planner Briefing Note 21 - February 2024 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -1.1% during 2024 and 2025 but will grow in the medium term (+2.6% per annum during 2026 to 2030), and longer term (+2.6% per annum beyond 2030). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses.

5.17 For convenience goods retail, Experian indicates a -0.1% decline in sales densities during 2024 and 2025 but will grow in the medium term (+0.2% per annum during 2026 to 2030) and +0.1% per annum thereafter.

5.18 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.8% decline in sales densities during 2024 and 2025; a small average increase of 0.5% per annum during 2026 to 2030; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

5.19 The turnover of facilities within Elmbridge Borough is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in August 2024. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.

5.20 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. The split between last main trip and other main trip is 50:20. These splits are based on Lichfields' experience and are widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Elmbridge Borough (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Weybridge	87.7	99.0	99.0	**93.3**
2 – Walton-on-Thames	89.2	89.6	97.3	**91.7**
3 – Molesey / Thames Ditton	76.5	82.5	89.9	**81.7**
4 – Claygate	74.4	74.5	85.5	**77.7**
5 – Esher / Hersham	94.4	93.8	99.1	**95.7**
6 – Cobham / Oxshott	75.2	80.5	94.4	**82.0**

Source: NEMS household survey results August 2024

5.21 Elmbridge retains a high share of convenience goods shopping trips across all six zones within the authority area, particularly high in the central and northwest parts of the Borough. Expenditure retention is lower (77.7%) in Zone 4 – Claygate, where some convenience goods expenditure primarily leaks to large food stores in Surbiton, and in Zone 6 – Cobham/Oxshott (82%) where expenditure primarily leaks to Leatherhead.

5.22 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there may be limited potential for Elmbridge Borough to increase its market share of convenience goods expenditure in the future.

5.23 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within the Elmbridge Borough zones, as shown in Table 5.2. The market shares are also higher in the central and northwest parts of the Borough and much lower in the east of the Borough.

Table 5.2 Non-food comparison trip retention (% of all trips in each zone – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	**Combined weighted**
1. Weybridge	54.6	49.9	59.0	44.3	70.4	93.2	95.6	69.0	28.2	**57.1**
2. Walton-on-Thames	43.5	69.1	73.1	35.2	50.1	93.8	93.9	70.2	46.9	**58.4**
3. Molesey/Thames Ditton	18.6	58.2	17.0	20.4	42.3	55.5	47.2	43.6	2.6	**26.1**
4. Claygate	8.8	18.5	4.9	10.1	36.0	40.0	28.4	22.2	7.0	**14.6**
5. Esher/Hersham	42.6	46.5	37.7	36.1	68.9	79.9	84.0	53.3	30.8	**46.6**
6. Cobham/Oxshott	42.4	30.1	51.1	30.2	40.7	90.7	87.1	68.5	31.3	**48.7**

Source: NEMS household survey results August 2024

5.24 The retention of comparison goods expenditure is generally lower for higher order goods e.g. clothing, domestic electrical goods and furniture but higher for day-to-day goods e.g. health/ beauty, DIY/hardware and books/stationery.

5.25 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.3.

5.26 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping, but significantly higher than for comparison goods shopping. The Borough's market shares are lower in the eastern parts of the Borough.

Table 5.3 Food and beverage trip retention in Elmbridge Borough (% of all trips in each zone)

	Eating out	Drinking away from home	Combined market weighted share
1. Weybridge	71.7	72.3	**71.8**
2. Walton-on-Thames	75.9	91.9	**79.1**
3. Molesey/Thames Ditton	50.7	62.2	**53.0**
4. Claygate	61.0	73.3	**63.5**
5. Esher/Hersham	82.3	80.3	**81.9**
6. Cobham/Oxshott	77.5	93.6	**80.7**

Source: NEMS household survey results Augst 2024.

Capacity for convenience goods retail floorspace

5.27 Based on the market shares calculated from the August 2024 household survey results, available convenience goods expenditure attracted to facilities in the Borough in 2024 is shown in Table 5 in Appendix 3. This expenditure has been projected forward to 2027, 2030, 2035 and 2040, and is summarised in Table 11 Appendix 3. Convenience goods expenditure available to facilities in the Borough is expected to decrease from £425.98 million in 2024 to £417.33 million in 2040. This decrease is due to population decline and increases in special forms of trading (SFT deduced from available expenditure). A breakdown for facilities in the Borough is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2024 (household survey based turnover)

	Turnover £M
Zone 1 - Weybridge/Brooklands	126.45
Zone 2 - Walton-on-Thames	62.88
Zone 3 - East Molesey/Thames Ditton	61.39
Zone 4 - Claygate/Hinchley Wood	17.53
Zone 5 - Esher/Hersham	93.60
Zone 6 - Cobham/Oxshott	64.14
Total	**425.98**

Source: Table 11 in Appendix 3.

5.28 The benchmark turnover of the main food stores in the Borough is calculated in Table 10 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

5.29 The combined benchmark turnover of identified food stores in the Borough is estimated to be £395.57 million. This benchmark turnover excludes small convenience good shops in the Borough. Nevertheless, these estimates suggest food stores in the Borough are trading satisfactorily.

5.30 Table 11 in Appendix 3 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. Due to the expected decrease in population and the increase in SFT, the expenditure projections are negative i.e. there is an expenditure deficit in the future. The expenditure deficit projections have been converted into floorspace estimates in Table 12 in Appendix 3 based on a combined approximate company average sales density of £12,000 per sq.m net of the main food store operators, as summarised in Table 5.5.

Table 5.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

	2027	2030	2035	2040
Zone 1 - Weybridge/Brooklands	-159	-422	-563	-639
Zone 2 - Walton-on-Thames	-108	-189	-229	-220
Zone 3 - East Molesey/Thames Ditton	-107	-195	-239	-233
Zone 4 - Claygate/Hinchley Wood	-32	-67	-94	-88
Zone 5 - Esher/Hersham	-164	-320	-427	-424
Zone 6 - Cobham/Oxshott	-117	-252	-364	-409
Total	**-688**	**-1,445**	**-1,915**	**-2,013**

Source: Table 12 in Appendix 3.

Qualitative need

5.31 Food store provision in the Borough is set out in Table 10 in Appendix 3. Convenience goods sales floorspace in these main stores totals over 35,000 sq.m net. Collectively the six main centres in Elmbridge have 42 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. There is further provision in all of the nine other designated centres in the Borough.

5.32 Main shopping trips traditionally are generally made once a week or less often, although recently households have increasing undertaken top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large food stores are the usual destination for these types of bulk food shopping trips.

5.33 There are four superstores of over 2,500 sq.m net in the Borough i.e. Sainsbury's in Cobham and Walton, Morrisons in Weybridge and Tesco Extra at Brooklands. The Borough has four Waitrose supermarkets, two M&S food halls and a Tesco supermarket, which are also suitable for main and bulk food shopping. The discount sector is well represented in the Borough with Lidl stores in Hersham and near Brooklands and an Aldi store in Walton. These large food stores are complemented by small convenience goods stores, including three Co-op stores, three Sainsbury's Locals, four Tesco Express and two Budgens stores ranging from about 60 to 380 sq.m net, which are suitable for top-up food and grocery shopping.

5.34 Residents in the northeast of the Borough also have good access to large food stores in the Kingston and Surbiton area. Residents in the Borough have excellent access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 5.1 in all zones in the Borough.

Capacity for comparison goods floorspace

5.35 Available comparison goods expenditure has been projected to 2027, 2030, 2035 and 2040 and is summarised in Table 10 in Appendix 4. Comparison goods expenditure available to facilities in the Borough is expected to increase from £287.85 million in 2024 to £419.59 million in 2040. A breakdown for facilities in each zone is set out in Table 5.6.

Table 5.6 Comparison goods base year turnover in 2024 (household survey based turnover)

	Turnover £M
Zone 1 - Weybridge/Brooklands	139.33
Zone 2 - Walton-on-Thames	71.30
Zone 3 - East Molesey/Thames Ditton	14.48
Zone 4 - Claygate/Hinchley Wood	5.42
Zone 5 - Esher/Hersham	15.69
Zone 6 - Cobham/Oxshott	41.63
Total	**287.85**

Source: Table 10 in Appendix 4.

5.36 The comparison goods turnover of all retail facilities in the Borough is estimated to be £287.85 million. About 60% of this turnover (£172 million) is estimated to be attracted to the six main centres i.e. Walton-on-Thames, Cobham, Weybridge, East Molesey, Esher and Hersham. There are 211 comparison goods outlets in these six main centres. Their combined comparison goods turnover (£172 million) suggests an average turnover of about £0.8 million per outlet. Comparison outlets in the Borough appear to be trading satisfactorily.

5.37 Table 10 in Appendix 4 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

5.38 In 2026 there is a projected small expenditure deficit of -£2.61 million, increasing to -£9.79 million in 2040. These projections suggest growth in turnover densities will exceed future expenditure growth. The deficit expenditure projections have been converted into floorspace estimates Table 11 in Appendix 4. The results are summarised in Table 5.7.

Table 5.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2027	2030	2035	2040
Zone 1 - Weybridge/Brooklands	-278	-432	-781	-765
Zone 2 - Walton-on-Thames	-131	-189	-330	-260
Zone 3 - East Molesey/Thames Ditton	-28	-42	-69	-51
Zone 4 - Claygate/Hinchley Wood	-12	-22	-40	-32
Zone 5 - Esher/Hersham	-31	-52	-94	-77
Zone 6 - Cobham/Oxshott	-103	-188	-357	-378
Total	**-583**	**-925**	**-1,671**	**-1,563**

Source: Table 11 in Appendix 4.

Qualitative need

5.39 Collectively the six main centres in the Borough have 211 comparison goods outlets. This includes a mix of national multiples and small independent shops. There is further provision in all of the nine other designated centres in the Borough.

5.40 The Borough also has a limited selection of retail warehouses and quasi-retail uses including Paddock Retail Park/Brooklands (Currys, TK Maxx and Marks & Spencer). However, the Borough's residents have good access to retail warehouses in adjacent authority areas for example at Wey Retail Park in Byfleet (Home Bargains, Pets at Home, Harveys and Halfords) and at New Malden (B&Q, Currys, Dreams and Furniture Village).

5.41 As indicated in Section 3, collectively Elmbridge's centres have a reasonable range and choice of comparison goods outlets, but the leakage of higher order comparison goods expenditure to larger shopping destinations is relatively high, particularly Kingston upon Thames and to a lesser extent Guildford, Staines and Central London. Overall, the accessibility for residents in the Borough to a range and choice of comparison goods shopping destinations is reasonable, taking into account the overlapping catchment areas and the proximity of Kingston upon Thames Metropolitan Centre.

Capacity for food/beverage floorspace

5.42 Available food and beverage expenditure has been projected forward to 2027, 2030, 2035 and 2040, and is summarised in Table 10 in Appendix 5. The amount of expenditure attracted to the Borough is expected to increase from £287.42 million in 2024 to £329.1 million in 2040. A breakdown for facilities in each zone is set out in Table 5.8.

5.43 There are 211 food and beverage in the six main centres in the Borough. The combined food and beverage turnover of these destinations is about £233 million. These estimates suggest an average turnover of about £1.1 million per outlet. Food and beverage outlets in the Borough appear to be trading satisfactorily.

Table 5.8 Food and beverage base year turnover in 2024 (household survey based turnover)

	Turnover £M
Zone 1 - Weybridge/Brooklands	55.58
Zone 2 - Walton-on-Thames	56.71

	Turnover £M
Zone 3 - East Molesey/Thames Ditton	33.72
Zone 4 - Claygate/Hinchley Wood	14.23
Zone 5 - Esher/Hersham	56.02
Zone 6 - Cobham/Oxshott	71.15
Total	**287.42**

Source: Table 10 in Appendix 5.

5.44 Table 10 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2027 there is a small expenditure surplus of +£5.06 million. Continued expenditure growth creates an expenditure surplus of +£28.47 million in 2040. Floorspace capacity projections are shown in Table 11 in Appendix 5 and summarised in Table 5.9 below.

Table 5.9 Food and beverage floorspace capacity (sq.m gross) - cumulative

	2027	2030	2035	2040
Zone 1 - Weybridge/Brooklands	172	331	593	884
Zone 2 - Walton-on-Thames	167	346	657	1,007
Zone 3 - East Molesey/Thames Ditton	100	199	381	590
Zone 4 - Claygate/Hinchley Wood	40	69	123	217
Zone 5 - Esher/Hersham	163	304	557	896
Zone 6 - Cobham/Oxshott	193	358	637	985
Total	**835**	**1,607**	**2,948**	**4,578**

Source: Table 10 in Appendix 5.

Qualitative need

5.45 Collectively the six main centres in the Borough have 211 food/beverage outlets, which provide a good range and choice of outlets. There is further provision in all of nine other designated centres in the Borough.

5.46 Walton-on-Thames and Weybridge have the strongest provision of outlets serving the evening economy. As indicated in Sections 3 and 4 the Borough's main centres have a good provision of restaurant/cafés but the provision of pubs/bars and hot food takeaways are below the national averages. Overall, the accessibility for residents in the Borough to a range and choice of food/beverage outlets is reasonable.

Operator space requirements

5.47 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (October 2024) list of operators whose published information suggest they may have space requirements in Elmbridge are shown in Tables 5.10 to 5.12.

5.48 In total, there are 28 retail and food/beverage operators listed as having potential space requirements in Elmbridge with a potential total floorspace requirement of at least 8,670 sq.m gross, as follows:

- Convenience goods retailers 5 (2,560 sq.m gross)
- Comparison goods retailers 13 (4,170 sq.m gross)
- Food/beverage operators 10 (1,940 sq.m gross).

Table 5.10 Convenience goods retail operator space requirements in Elmbridge

Operator	Floorspace in sq.m (min/max)	Location
COOK - frozen meals	90 - 130	Weybridge
Grape Tree - health foods	70 - 190	Cobham
Lidl - supermarket	1,600 - 2,500	Cobham, Esher, Molesey, Walton on Thames, Weybridge
M&S Food - supermarket	560 - 2,300	Esher, Cobham, Hersham, Molesey, Weybridge
Taj The Groce - vegan/organic	240 - 370	Walton on Thames, Weybridge

Source: The Requirements List (October 2024)

Table 5.11 Comparison goods retail operator space requirements in Elmbridge

Operator	Floorspace in sq.m (min/max)	Location
Age UK - charity shop	130 - 490	Weybridge
Between the Lines - gifts	80 - 170	Cobham, Weybridge
Gaucho - restaurant	390 - 590	Cobham
Matalan	1,400 - 2,300	Walton on Thames, Weybridge
Sleep.8 - beds	190 -790	Weybridge
Sofa & Stuff	290 - 490	Cobham, Weybridge
Sussex Beds	190 - 490	Walton on Thames
The White Company - home store	90 - 290	Cobham
The Works - discount retail	140 - 190	Esher
Tapi Carpets	190 - 390	Weybridge
TK Maxx - fashion	900 - 2,900	Walton on Thames
Vinegar Hill - home/fashion	90 - 140	Cobham
Well Kneaded - pizzeria	90	Cobham

Source: The Requirements List (October 2024)

Table 5.12 Food/Beverage operator space requirements in Elmbridge

Operator	Floorspace in sq.m (min/max)	Location
Dim t - Asian food restaurant	290-440	Esher, Weybridge
Innkeeper's Lodge - pub/restaurant/hotel	n/a	Walton on Thames
Köşebaşı - Turkish restaurant	240-490	Cobham, Weybridge
KFC - fast food restaurant/takeaway	110 – 240	Cobham, Esher, Weybridge
McMullen & Sons - pubs	240-490	Esher, Weybridge
Megan's - restaurant	210-490	Cobham
Premium Country Pubs - pub/restaurant	n/a	Walton on Thames

Operator	Floorspace in sq.m (min/max)	Location
The Burger Club - restaurant	110-240	Esher
Vapiano - restaurant	340- 1,100	Cobham, Weybridge
Vintage Inns - pub/restaurant	400	Walton on Thames

Source: The Requirements List (October 2024)

5.49 Some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in Elmbridge, therefore the total number of requirements and amount of floorspace outlined above should be treated with caution.

6.0 Leisure, entertainment and cultural uses

Introduction

6.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

6.2 Residents in the Borough have a reasonable range of commercial leisure and entertainment uses within the authority area and within neighbouring authorities. Public transport access to facilities within Kingston-upon-Thames and Central London also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

6.3 Experian's projections and local expenditure data for the household study area indicates the resident population generates £104.68 million in 2024 (an average of about £466 person) on selected cultural, recreational and sporting services, including:

- cinema admissions £4.07 million;
- live entertainment i.e. theatre/concerts/shows £13.87 million;
- museums, theme parks, houses and gardens £10.50 million;
- admissions to clubs, dances, discos, bingo £6.05 million;
- other miscellaneous entertainment £13.01 million;
- subscriptions to sports and social clubs £25.38 million; and
- leisure class fees £31.80 million.

6.4 Leisure, entertainment and cultural expenditure has been projected to 2040 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 21 – February 2024). Taking population changes into account leisure expenditure is projected to increase by 14.6% from £104.7 million in 2024 to £120 million in 2040.

6.5 Not all leisure/cultural expenditure from study area residents is spent in Elmbridge. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 6.1. Around 9% of households do not participate in any of the nine leisure activities explored by the household survey.

6.6 The participation and retention rates vary significantly for each leisure activity. Many residents travel outside the study area for leisure activities e.g. to Central London, Kingston-upon-Thames, and nearby smaller centres such as Addlestone, Tolworth and Feltham. The retention rate is highest for trips to trampoline parks (59.7%), indoor/soft play (55.7%) and health/fitness facilities (52.3%) but very low for bingo (2.6%), theatres (4.9%) and museums/galleries (6.1%). For bingo and tenpin bowling, low or zero retention rates are accompanied by a low participation rates, suggesting that a lack of local provision may be limiting involvement. The results for theatres and museums/galleries suggest that households are prepared to travel further for these activities. The high retention rates for trampoline parks and indoor/soft play are accompanied by a low participation rates, suggesting that local demand is well-served by local provision.

Table 6.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% study area households participating	% trips attracted to Elmbridge Borough
Cinema	59.4	40.5
Theatre	44.5	4.9
Nightclubs / live music venues	15.6	19.6
Bingo	1.4	2.6
Gyms / health and fitness club	39.8	52.3
Tenpin bowling / gaming	12.2	0.0
Indoor / soft play	6.9	55.7
Trampoline parks	5.8	59.7
Museums / art galleries	38.3	6.1

Source: NEMS household survey results August 2024

6.7 Central London is the main destination for three leisure activities, attracting 73.0% of assessed households to its museums/galleries, 52.8% to its theatres, and 35.6% to its nightclubs/live music venues.

6.8 Feltham was the most popular destination for Bingo, attracting 17.9% of assessed households to its town centre and 26.1% to Buzz Bingo specifically. Feltham also attracted high numbers for bowling (15.1%) but Tolworth, Surbiton was the most popular destination (26.6%) followed by Kingston-upon-Thames (16.3%).

6.9 Destinations within Elmbridge were the most popular choice for the cinema, indoor soft play, trampoline parks and gyms.

6.10 The household survey results and Experian's expenditure figures suggest facilities in Elmbridge Borough attract less than 40% of leisure, entertainment and cultural expenditure within the study area, which is about £41.9 million in 2024. This retained leisure expenditure is projected to increase to £44.4 million in 2030; £46.1 million in 2035 and £48 million in 2040.

6.11 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,540 per sq.m gross in 2030; £2,566 per sq.m in 2035 and then to £2,592 per sq.m in 2040, based on Experian's projected growth in leisure sales densities.

6.12 If leisure/cultural expenditure attracted to the Borough increased by £2.2 million by 2030 and then £4.2 million in 2035 and £6.1 million in 2040, as indicated above, then this additional expenditure could support about 850 sq.m gross of new commercial leisure and cultural floorspace by 2030, increasing to about 1,650 sq.m gross by 2035 and then 2,350 sq.m gross by 2040.

6.13 This analysis provides a broad brush global floorspace capacity analysis and assumes Elmbridge will continue to retain, as a minimum, a low (40%) proportion of leisure expenditure within the study area. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

6.14 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2023 figures indicate 123.6 million cinema trips were made in the UK (about 1.8 trips per person), still 30% below pre-Covid levels (176 million).

6.15 The cinema assessment for Elmbridge Borough assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.8 and 2.6 trips per person per annum.

6.16 The UK Film Distributors' Association identities 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINeSCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.

6.17 The study area population is 224,708 in 2024, which based on the pre and post Covid national averages above, would generate between 404,500 to 584,200 cinema trips. These trips can theoretically support between 10 and 15 cinema screens. However, not all cinema trips will be attracted to facilities in the Borough. Cinemas surrounding the Borough attract a significant number of trips, and the Borough's theoretical cinema capacity will be much lower.

6.18 There are only two cinema facilities in the Borough, at Walton and Esher with six screens and 967 seats. Walton's Everyman has two screens 158 seats, and the Everyman in Esher has four screens with 809 seats. The household survey results suggest Elmbridge retains just over 40% of all trips within the Borough (25.8% to Esher, 13.6% to Walton). This market share equates to between 163,800 to 236,600 cinema trips. There is significant cinema provision in Woking, Kingston and Staines. The Light at Addlestone One is the second most popular destination overall, attracting 22.4% of surveyed households. Cinema destinations attracting significant visits according to the household survey are set out in Table 6.2.

6.19 Based on its current 40% market share, facilities in Elmbridge are meeting demand. Between 163,800 to 236,600 cinema trips are retained within the Borough, equating to capacity to support for between four and six screens.

Table 6.2 Cinema provsion in surrounding authorities

Cinema	Capacity	% study area market share
Everyman, Esher	4 screens (809 seats)	13.6
Everyman, Walton	2 screens (158 seats)	25.8
Nova, Woking	7 screens (986 seats)	3.1
Odeon, Kingston	14 screens (2,921 seats)	6.8
Odeon Luxe, Epsom	8 screens (744 seats)	2.7
The Light, Addlestone One	6 screens (686 seats)	22.4
Vue, Staines	10 screens (2,143 seats)	13.1

Source: Ukcinemas.org; NEMS household survey results August 2024.

6.20 Population within the study area is projected to decrease slightly from 224,708 to 224,099 by 2040. The population estimate at 2040 is projected to generate between 403,400 to 582,700 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum).

6.21 To support an additional screen, Elmbridge would need to increase its market share of cinema trips to 50%. Retaining 50% of trips within the Borough (202,250 to 292,100) delivers a theoretical capacity of five to seven screens. Towards the higher figure of additional trips, only one more screen could be supported. Existing cinema provision within the surrounding area may limit operator demand for a new facility in the study area. Furthermore, the longer-term impact of Covid-19 and growth in home viewing on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the pre-Covid UK average of 2.6 trips per person.

6.22 The current provision of cinema facilities in Elmbridge is aligned with demand and its current market share. There is no immediate need to increase provision.

Theatres, nightclubs, live music and other cultural activities

6.23 The household survey results indicate 44.5% of respondents in the study area visit theatres. Around 38.3% visit museums/art galleries and about 15.6% visit nightclubs/live music venues.

6.24 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.

6.25 Experian's local expenditure data indicates the Elmbridge study area generates £13.87 million on live theatre, concerts and shows in 2024, which is projected to increase to £15.9 million in 2040. Based on the average ticket revenue per venue (£5.7 million) the Elmbridge study area population currently generates theoretical demand for two theatre venues. By 2040, growth (about £2 million additional expenditure) would not equate to demand for an additional venue, but would deliver additional expenditure within existing venues. Furthermore, the household survey results suggest the Borough attracts less than 5% of theatre trips, with limited expenditure retained within Elmbridge. Central London is the most popular destination, attracting almost 53% of trips. Relatively high numbers are also drawn to the New Victoria Theatre at Woking (18.7% of trips).

6.26 Despite the low market share within the study area, the Borough has three theatre venues:

- Cecil Hepworth Playhouse, Walton (attracting 1.1% of trips)
- Riverhouse Barn, Walton (attracting 1.7% of trips)
- Esher Theatre (attracting 1.7% of trips)

6.27 The existing provision is above the theoretical demand generated by the study area, based on the current market share of less than 5%. This low market share suggests a high proportion of theatre trips to the three venues in Elmbridge may come from people living beyond the study area. Nevertheless, projected expenditure growth and the low market share suggest there is limited potential for new theatre facilities in the Borough.

6.28 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs and bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

6.29 The household survey results suggest 15.6% of households visit nightclubs/music venues and of these participating households around 19.6% are attracted to facilities in the Borough.

6.30 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is £6.05 million in 2024 within the Elmbridge study area. This relatively low level of expenditure and good access to nightclub/live music venues in Central London (attracting 35.6% of trips) are likely to limit demand for additional facilities in the Borough. Significant numbers are also attracted to Guildford (8.1%) and Kingston-upon-Thames (8.5%).

6.31 Experian's local expenditure data indicates the Elmbridge study area generates £10.5 million on museums, theme parks, houses and gardens in 2024, which is projected to increase to £12.03 million in 2040, an additional £1.53 million.

6.32 The household survey results suggest around 38% of households visit museums/ art galleries, but only 6.1% visited locations in Elmbridge, including Brooklands Museum (2.0%) and Mercedes-Benz World (1.7%), with lower numbers visiting Wyecliffe Galleries/Weybridge town centre (0.5%/0.1%), Riverhouse Barn (0.5%), and Walton town centre (0.4%). Central London is the most significant out-of-Borough destination, attracting 73% of visitors.

6.33 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision in Elmbridge. However, there may be potential to increase the Borough's market share and attract more demand from tourist visitors if provision is improved.

Health and fitness clubs

6.34 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of clubs reduced by 176. The household survey results indicate 30.2% of households visit health and fitness gyms, which is higher than the national average participation rate of just over 15%.

6.35 The Sport England/Active Places data indicates that there are 23 registered health and fitness facilities in Elmbridge Borough, with 1,088 fitness stations, as shown in Table 6.3.

Table 6.3 Health and fitness facilities in Elmbridge

Facility	Number of fitness stations	Type of access
Nuffield Health (Long Ditton)	80	Registered Membership use
St Georges Hill Lawn Tennis Club	45	Registered Membership use
Colets Health & Fitness Club	67	Registered Membership use
Pavilion Sports & Fitness Club	76	Registered Membership use
Riverside Gymnasium	13	Registered Membership use
Sandown Sports Club & Ski Centre	50	Registered Membership use
Livingwell Fitness (Cobham)	10	Registered Membership use
Acs Cobham International School	25	Private Use
Elmbridge Xcel Leisure Complex	120	Registered Membership use
Esher College	12	Sports Club / Community Association
Brooklands College (Weybridge Campus)	19	Private Use
Bannatyne Health Club (Weybridge)	56	Registered Membership use
Physique Warehouse	80	Registered Membership use
Notre Dame School	12	Private Use
Reeds School	15	Sports Club / Community Association
Hinchley Wood School	25	Sports Club / Community Association
Brooklands Spa	12	Registered Membership use
Imber Court Sports Club	16	Pay and Play
PureGym (Walton-On-Thames)	220	Registered Membership use
Silvermere Strength And Fitness	16	Sports Club / Community Association
Esher Church Of England High School	22	Private Use
Kingston Grammar School (Ditton Field)	12	Sports Club / Community Association
David Lloyd (Weybridge Brooklands)	85	Registered Membership use
Total	**1088**	

Source: Sport England 2024.

6.36 The current population in the Elmbridge study area is 224,708. The household survey results suggest the Borough attracts about 52.3% of gym trips from households in the study area, equating to a catchment population of about 117,500 in 2024. Based on this current estimated catchment population (117,500) there is an average of 9.3 fitness stations per 1,000 people.

6.37 Experian's local expenditure data indicates the Elmbridge study area generates £23.38 million on subscriptions to sports/social clubs and a further £31.8 million on leisure class fees, totalling £57.18 million. This total is projected to increase to £65.53 million in 2040. Facilities in Elmbridge Borough attract about £29.9 million in 2024, based on the 52.3% market share, which equates to about £27,500 per fitness station. Expenditure growth between 2024 to 2040, based on a constant market share of 52.3%, generates an additional £4.37 million, which could support about 159 additional fitness stations (based on one fitness station per £27,500). Based on this approach there could be scope for one large or two medium sized health and fitness facilities in the Borough.

6.38 An alternative approach has been adopted based on the regional average. Within the South East region there are 1,279 Sport England registered health and fitness facilities with 74,128 fitness stations (average of 58 stations per facility). This existing provision equates to about 7.9 registered fitness stations per 1,000 people in the South East region (ONS 2021 census, 9,278,065 population), which is lower than the 9.3 fitness stations per 1,000 people in Elmbridge Borough shown above. These figures suggest there is higher than average provision of fitness stations in Elmbridge compared with the regional average.

6.39 Despite this higher than average provision, demand for additional facilities in Elmbridge may arise from future expenditure growth if the current above-average participation rate is maintained.

Tenpin bowling and other indoor leisure innovations

6.40 Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

6.41 The household survey results indicate 12.2% of households visit ten-pin bowling/ gaming facilities, but none of these trips are attracted to the Borough, due to the absence of these types of facilities in Elmbridge. Other tenpin bowling destination mentioned by household survey respondents were:

- Hollywood Bowl, Tolworth (26.6%);
- Tenpin, Kingston-upon-Thames (16.3%);
- Tenpin, Feltham (15.1%);
- Woking Superbowl (12.6%);
- Chessington district centre (7.9%);
- Central London (4.5%);
- Worcester Park town centre (3.7%); and

- Guildford Spectrum (2.5%).

6.42 The Elmbridge study area's future 2040 population (224,099) can theoretically support 18 lanes, based on the national average of one lane per 12,000 people. Currently, the Borough retains no market share of this demand, and there is no Borough provision. To support a small facility of 4-5 lanes, the Borough would need to retain around 20% of trips. This small number of lanes could be supported within a mixed activity leisure facility.

6.43 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

6.44 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

6.45 The household survey results indicate 5.8% of respondents in the study area visit trampoline centres and 6.9% visit indoor soft play facilities. Both attract fairly high levels of trips within the Borough, with 59.7% for trampoline parks and 55.7% for soft play facilities. These activities therefore secured the highest retention rates in the Borough, though Bingo was the only activity to have a lower participation rate (1.4%).

6.46 Trampoline destinations mentioned by households participating in this activity were as follows:

- Jump in Adventure Park, Esher (46.5%);
- AirHop Adventure and Trampoline Park, Guildford (23.4%)
- Weybridge town centre (5.9%);
- Guildford town centre (4.9%);
- Jump Giants West London Trampoline Park, Slough (3.6%);
- Hampton Court Palace (2.9%); and
- Gravity Active Milton Keynes Xscape (2.0%).

6.47 The relatively high retention rate is supported by provision at Esher. The next most popular destination at Guildford is at least 20 minutes drive time from the southwestern areas of Elmbridge. There may be an opportunity for additional local provision if participation rates increased in the future.

6.48 Household participation in soft play centres was mainly in the Borough, with 55.7% using facilities within Elmbridge. Soft play destinations mentioned by households participating in this activity were as follows:

- Walton town centre (13.1%);
- Elmbridge Xcel Leisure Complex, Walton (12.7%);
- Kidabulous, Sunbury-on-Thames (7.2%);
- Esher town centre (6.6%);

- Chobham Adventure Farm, Woking (5.7%);
- Silvermere Softplay, Dorking (5.4%);
- Jump In Adventure Park, Esher (4.5%);
- Hersham town centre (4.4%); and
- Little Street Children's Role Play, West Byfleet (3.4%).

6.49 Participation within the Borough is split between several facilities, with soft play facilities producing a smaller catchment area than trampoline parks.

6.50 Overall, there may be potential scope for further provision of these types of leisure facilities in the Borough. These relatively new innovations are still evolving and the potential for continued growth is unclear. Participation levels based on the household survey are relatively low in comparison to other leisure activities. The strategy for the Borough should be flexible to respond to any emerging demand from leisure operators.

Bingo, games of chance and gambling

6.51 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

6.52 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

6.53 The household survey results indicate 1.4% of respondents in the study area visit bingo facilities, significantly lower than the UK average participation rates of around 5%. Few of these bingo trips are retained within the Borough, which attracts only 2.6% of visits overall. There are no permanent bingo facilities n Elmbridge and participation is likely events-based. The main Bingo destinations mentioned by participating households were as follows:

- Feltham: Buzz Bingo (26.1%) and Feltham (17.9%);
- Shepperton (27.6%);
- Byfleet (3.1%); and
- Cobham (2.0%).

6.54 The adult population in the Elmbridge study area (about 174,000 in 2024) is theoretically capable of supporting two bingo facilities and less than one casino, based on the UK averages. Considering the Borough's low participation rate (1.4%), there is unlikely to be scope to open a facility within the Borough. The continued growth in online bingo and gambling and provision in surrounding authority areas are likely to restrict operator demand in the Borough.

Conclusions on commercial leisure and other town uses

6.55 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted to capture more expenditure within the Borough e.g. live music, nightclubs, and cultural activities. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these leisure sectors, it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

6.56 In global terms future leisure expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in the Borough of:

- about 850 sq.m by 2030;
- about 1,650 sq.m by 2035; or
- about 2,350 sq.m by 2040.

6.57 This additional floorspace could include:

- one large or two medium sized health and fitness facilities;
- a small tenpin bowling facility within a multi-use leisure facility;
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

6.58 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

7.0 Accommodating growth and change

National guidance

7.1 For planning policies, local authorities are required to support the role of town centres and the three main areas policies should focus on:

- defining a network and hierarchy of centres, allowing them to grow and diversify;
- defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
- allocating a range of suitable sites to meet the scale and type of development needed for at least ten years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

7.2 The NPPF acknowledges the rapid changes that are affecting town centres and diversification is key to their long-term vitality and viability. Accordingly, planning policies should clarify the range of uses permitted, as part of a positive strategy for the future of each centre.

7.3 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

7.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.

7.5 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 91). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 92).

7.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). The locally set thresholds in Elmbridge Borough are addressed later in this section. Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

7.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

7.8 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses. The implications of these changes are addressed later.

7.9 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) is subtracted from the expenditure projections. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

7.10 The former Regulation 19 Draft Elmbridge Local Plan 2037 (to be withdrawn) does not include retail or food and beverage floorspace projections. Draft Policy ECO3 - Supporting our town, district and local centres indicates a range of retail, office, residential, community, cultural and leisure uses will be supported in the Borough's centres. The loss of these main town centre uses at ground floor level to residential use in the core activity areas is resisted.

7.11 The supporting text to Policy ECO3 (paragraph 7.18) states local evidence indicates that there is no need to plan for an increase in retail floorspace in the short to medium term, but policy still encourages local development opportunities for retail and other town centre uses in individual centres where they maintain and enhance the overall health, vitality and offer of a centre. This approach is supported by the update floorspace capacity projections in the report.

7.12 The updated assessment of the potential for new retail, food/beverage floorspace in this report suggests there is still no need for additional retail floorspace for the foreseeable future, based on current market shares. However, the projections do not suggest a significant over-supply of floorspace and there is a small under-supply in 2040. Tables 7.1, 7.2 and 7.3 below summarise the new floorspace requirements in the Borough up to 2030, 2035 and 2040 (cumulative).

7.13 Table 7.1 indicates there is a combined projected floorspace projection is negative at -763 sq.m gross for retail and food/beverage floorspace in 2030. The combined floorspace over-supply decrease slightly to -638 sq.m gross in 2035. Growth up to 2040 creates a small under-supply of 1,002 sq.m gross.

Table 7.1 Retail and food/beverage floorspace projections up to 2030 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 - Weybridge/Brooklands	-422	-432	331	-523
2 - Walton-on-Thames	-189	-189	346	-32
3 - East Molesey/Thames Ditton	-195	-42	199	-38
4 - Claygate/Hinchley Wood	-67	-22	69	-20
5 - Esher/Hersham	-320	-52	304	-68
6 - Cobham/Oxshott	-252	-188	358	-82
Total	**-1,445**	**-925**	**1,607**	**-763**

Table 7.2 Retail and food/beverage floorspace projections up to 2035 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 - Weybridge/Brooklands	-563	-781	593	-751
2 - Walton-on-Thames	-229	-330	657	98
3 - East Molesey/Thames Ditton	-239	-69	381	73
4 - Claygate/Hinchley Wood	-94	-40	123	-11
5 - Esher/Hersham	-427	-94	557	36
6 - Cobham/Oxshott	-364	-357	637	-84
Total	**-1,915**	**-1,671**	**2,948**	**-638**

Table 7.3 Retail and food/beverage floorspace projections up to 2040 (sq.m gross) – cumulative

Zone	Convenience goods retail	Comparison goods retail	Food/ beverage	Total
1 - Weybridge/Brooklands	-639	-765	884	-520
2 - Walton-on-Thames	-220	-260	1,007	527
3 - East Molesey/Thames Ditton	-233	-51	590	306
4 - Claygate/Hinchley Wood	-88	-32	217	97
5 - Esher/Hersham	-424	-77	896	395
6 - Cobham/Oxshott	-409	-378	985	198
Total	**-2,013**	**-1,563**	**4,578**	**1,002**

Source: Tables 11 and 12 in Appendix 3, 4 and 5.

7.14 These projections assume facilities in Elmbridge will maintain their market share of expenditure in the future. This approach recognises that additional development within the

Borough may help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. The household survey results indicate the Borough retains a reasonable level of expenditure and a significant increase in market shares is unrealistic. Conversely a significant reduction in market share could undermine the vitality and viability of centres in the Borough. A balanced and sustainable approach should be adopted.

7.15 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provide an opportunity to enhance the evening and night-time economy in centres, including the repurposing of vacant retail floorspace. The new Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

7.16 The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. To accommodate growth, local planning authorities should keep town centre boundaries under review. The floorspace projections should be viewed as broad guidance and a starting point for the review of development opportunities and development management policies.

Vacant shop premises

7.17 The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth. The existing stock of premises should have a key role to play in accommodating any projected growth, particularly in the short to medium term.

7.18 There are currently 105 vacant shop units in the six main centres in Elmbridge, an average vacancy rate of 14.8%, which is above the pre-Covid UK average (12.4%) and above the current UK average (13.9%). There were a further 35 vacant units in the nine other designated centres in the Borough in 2023, an average vacancy rate of 7.3%.

7.19 The floorspace capacity projections suggest the priority in the short-term will be the reoccupation of vacant shop units. The floorspace projections up to 2040 suggest there is a need to retain the existing stock of shop premises within centres to accommodate future growth. If the shop vacancy rate in the six main centres reduced from 14.8% to 10% then 34 shop units could be reoccupied. If the vacancy rate in other designated centres in the Borough also reduced by one third, then 11 more shop units could be reoccupied. These reductions in the shop vacancy rate could theoretically accommodate about 4,500 sq.m gross based on an average of 100 sq.m gross per unit. Based on these vacancy rate targets, reoccupied vacant floorspace could be distributed as follows:

- Cobham 200 sq.m gross
- Esher 1,700 sq.m gross
- Hersham 100 sq.m gross
- Walton on Thames 700 sq.m gross
- Weybridge 700 sq.m gross
- Other centres 1,100 sq.m gross

7.20 The long-term floorspace projections to 2040 suggest there will be a small combined quantitative need for additional retail and food/beverage floorspace of just over 1,000 sq.m gross. A modest reduction in the shop vacancy rate in Elmbridge's six main centres is more than sufficient to accommodate this long-term capacity projection.

7.21 The projections and current levels of shop vacancies suggest there is no need to allocate further sites for retail and food/beverage uses development over the new plan period.

7.22 Notwithstanding the limited scope for additional development, over and above vacant units, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within designed centres to accommodate future investment opportunities.

8.0 Policy implications

8.1 This Section sets out the implications for emerging policies within the new Local Plan.

Hierarchy of centres

8.2 In relation to town centres, the NPPF Annex 2 Glossary indicates:

"References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance."

8.3 The network of town centres is currently set out in the Elmbridge Core Strategy, adopted July 2011. Policy CS1 (Spatial Strategy) identifies a hierarchy for development, through settlement areas and designated centres, and sets out the retail hierarchy for Elmbridge. Policy CS1 directs growth towards previously developed land within existing built-up areas and posits the centres as the focus for new development.

8.4 Continuing to identify the hierarchy of centres in the new Local Plan will be important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

8.5 Adopted Policy CS1 categories the settlements within Elmbridge, as follows:

1 Main settlement areas: Walton and Weybridge;

2 Suburban settlement areas: Esher, Hersham, East and West Molesey, Hinchley Wood and the Dittons;

3 Service centre and rural fringe area: Cobham, Oxshott, Stoke D'Abernon and Downside;

4 Suburban village: Claygate.

8.6 The town centre hierarchy is also designated in Policy CS1, as follows:

1 Town centre: Walton-on-Thames;

2 District centres: Weybridge, Cobham, Esher, East Molesey, Hersham;

3 Local centres: Claygate, East Molesey Bridge Road, Hinchley Wood, Oxshott, Oatlands, Thames Ditton, Walton Terrace Road, Walton Halfway, Weybridge Queens Road.

8.7 The analysis of centres in Section 4 and Appendix 2 indicates some amendments to the current designation and hierarchy of centres should be considered, as proposed in the former Draft Local Plan.

8.8 The Council's proposed upgrading of the status of Weybridge, Cobham and Esher to 'Town Centre' level, and the upgrading of Claygate, East Molesey Bridge Road and Thames Ditton to 'District Centre' level is consistent with the analysis in this report. The proposed upgrading of Weybridge, Cobham and Esher to Town Centres is consistent with their size in terms of number of units and their combined retail and food/beverage turnover when compared with Walton-on-Thames as described in Section 4.

8.9 East Molesey and Hersham have a much lower number of units and combined turnover and should remain as District Centres. Claygate, East Molesey Bridge Road and Thames Ditton have a similar number of units as East Molesey and Hersham have a higher turnover than the other Local Centre. These centres should be upgraded to District Centre status due to their scale and turnover, when compared with existing District and Local Centre.

8.10 There may also be opportunities to amend centre boundaries to more appropriately reflect the extent of town centre uses, as outlined later in this Section.

Impact and sequential tests

8.11 Policy CS18 (Town Centre Uses) of the Elmbridge Core Strategy (2011) relates to the development of town centre uses within and outside town, district and local centres. The policy then designates Primary Shopping Frontages (PSF) and Secondary Shopping Frontages (SSF) within town and district centres, to control an appropriate balance of uses. These Frontages, as well as the local centre boundaries, are defined within the Planning Policy Map.

8.12 It is recognised that Elmbridge Council's former Draft Local Plan submission (to be withdrawn) suggests Core Activity Areas (CAAs) as a comprehensive designation to replace Frontages in draft Policy ECO3 (Supporting our town, district and local centres). For the purposes of consistency with the NPPF, the Core Activity Areas could be renamed as Primary Shopping Areas (PSAs), or a reference in the supporting text could indicate the CAAs are consistent with PSAs, as described in the NPPF.

8.13 New Local Plan policies should set out the sequential and impact tests or refer to the tests set out in the NPPF. The New Local Plan should indicate which designated centres need to be considered. Neither the existing Core Strategy and Development Management Plan, nor the former Draft Local Plan, specifically mention town centre boundaries, PSAs or CAAs, in sequential terms, and it may be unclear what locations within or close to the centre boundaries will be considered 'in centre', 'edge of centre' or 'out of centre', or locations where an impact assessment will be required.

8.14 The NPPF (paragraph 92) states that *"when considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites which are well-connected to the town centre."* An out-of-centre site could be rejected under the sequential test where it is not accessible or not well-connected to the town centre, and where another accessible and well-connected site is available and suitable.

8.15 Retail uses should first be focussed in the CAA/PSA. Leisure and other main town centre uses should be focussed anywhere in the wider town centre. The need for a separate CAA/PSA is addressed below.

8.16 The NPPF (paragraph 94) indicates that when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. The NPPF indicates the impact test only applies to retail and leisure uses, rather than all main town centre uses.

8.17 Again, policies in the existing Core Strategy and Development Management Plan, or former Draft Local Plan, do not refer to impact thresholds, therefore the NPPF default threshold of 2,500 sq.m gross floorspace applies.

Impact threshold

8.18 The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable; and
- the likely effects of development on any town centre strategy, and the impact on any other planned investment.

8.19 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sqm gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre.

8.20 As shown in Section 7, the floorspace capacity projections indicate a potential over-supply of retail floorspace in the Borough. These negative projections suggest that the NPPF minimum threshold of 2,500 sqm gross would be an inappropriate threshold for Elmbridge Borough because this scale of development would significantly exceed retail, food/beverage and leisure needs for all centres in the Borough. The Council should consider introducing a locally set threshold for the centres in Elmbridge Borough.

8.21 Based on the low/negative floorspace capacity projections set out in Tables 7.1, 7.2 and 7.3, the new Local Plan should adopt lower impact thresholds for retail and leisure uses. The capacity projections, high vacancy rate in Esher and uncertainties about the after-effects of the cost-of-living crisis recovery suggest town centres are now more vulnerable to out-of-centre developments.

8.22 Given also the overlapping nature of catchment areas in the Borough, the Council should consider a consistent amended impact threshold to apply across the authority area, in line with the Sunday trading limit (up to 500 sqm gross or 280 sqm net sales) to protect the vitality and viability of designated town, district and local centres for retail and leisure uses.

8.23 All retail and leisure developments over 500 sqm gross (combined) proposed outside or on the edge of designated centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

Implications of UCO changes for the impact and sequential tests

8.24 Retail and leisure uses previously related to Use Classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, new Local Plan policies relating to the impact test should, as indicated above, refer to retail and leisure uses, rather than Class E within the new UCO. The sequential test should continue to refer to all main town centre uses as described in the NPPF glossary.

Sequential test floorspace threshold

8.25 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have "*particular market and locational requirements that mean they may only be accommodated in specific locations*", but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated town, district and local centres to be provided in areas that may be poorly served and/or within mixed use development, to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town centre and primary shopping area boundaries

8.26 The new Local Plan should continue to define clear boundaries for town, district and local centres on the Proposals Map. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

8.27 The continued identification of town, district and local centre boundaries, as well as CAAs or PSAs within centres, in Elmbridge is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required.

8.28 The NPPF continues to indicate that the first preference for retail uses should be the PSA. In some circumstances where a centre is relatively small, the town centre boundary and CAA/PSA may cover the same area, in which case, only one boundary is required on the Proposals Map.

8.29 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the CAA/PSA and other parts of the town centre.

8.30 The ability to focus new retail uses within the CAA/PSA, rather than the wider town centre area or indeed out-of-centre locations, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses. Some leisure uses, for example, fall within Class E, whereas some others fall within 'Sui Generis'. The new Local Plan policies could provide further clarity on main town centre uses, that is all retail and leisure uses, as defined by the NPPF, in its efforts to seek to protect Class E within Elmbridge's designated centres.

8.31 The continued need for both a town centre boundary and a CAA/PSA in the town and district centres should be considered, particularly in East Molesey and Hersham, where the existing PSF and SSF covers most of the area within the centre boundaries. The nine local centres currently do not have a separate CAA/PSA and their centre boundaries, because these centres are relatively small.

8.32 The area of search for sequential sites i.e. relevant centres, will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. As indicated above, some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

8.33 The low floorspace capacity projections and available vacant units suggest there is no need to extend centre or CAA/PSA boundaries to accommodate future growth. The expansion or contraction of centre boundaries should be considered on a centre-by-centre basis, as outlined below.

8.34 The contraction of centre or CAA/PSA boundaries is only likely to be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Walton-on-Thames

8.35 The combined floorspace capacity projection for the Walton-on-Thames zone up to 2040 is only 527 sq.m gross. If the shop vacancy rate in Walton reduced to 10% then reoccupied space could total 1,700 sq.m gross, which exceeds the floorspace capacity projection.

8.36 The current town centre boundary for Walton-on-Thames is relatively widely drawn, including St Mary's Church and Cemetery and retail warehouse stores in the north, car parking at the southwest, and Walton Montessori School and Elm Grove Hall at the southeast of the centre.

8.37 The Submission Policies Map defines a slightly smaller town centre boundary, with the following proposed changes:

- contraction at Bridge Street (residential uses);
- contraction at Mayo Road (residential uses);
- contraction at Churchfield Road (retirement homes); and
- extension to incorporate all of the church green and cemetery area at St Mary's Church.

8.38 These changes appear to be appropriate. The proposed site allocations in the former Draft Local Plan in the northern and southeastern sections of the town centre includes various outbuildings either vacant or storage use, Dependent on whether these allocations are for residential or mixed-use, these sites could be included or excluded from the town centre boundary.

8.39 The current Planning Policy Map has a separate designation for The Heart Shopping Centre to the PSF and SSF. The Submission Policies Map proposes to amalgamate The Heart units with existing PSF units (including parts of High Street and Bridge Street) as the CAA. The CAA includes the main concentration of retail uses and this appears to be appropriate.

8.40 The combined floorspace capacity projection for Walton-on-Thames up to 2040 is only 527 sq.m gross. If the shop vacancy rate in Walton reduced 10% then reoccupied space could total 1,700 sq.m gross, which exceeds the floorspace capacity projection.

Weybridge

8.41 The combined floorspace capacity projection for the Weybridge/Brooklands zone up to 2040 is negative (-520 sq.m gross). If the shop vacancy rate in Weybridge reduced to 10% then reoccupied space could total 700 sq.m gross. Weybridge could increase its market share of expenditure and absorb growth from other parts of the Borough.

8.42 The current centre boundary for Weybridge is relatively tightly drawn but includes the large Morrison's supermarket and the new Weybridge Health Centre. The Submission Policies Map proposed the following minor changes to the boundary:

- excludes Bentley Place apartments;
- excludes Balfour House apartments on Balfour Road;
- excludes homes along Holstein Avenue (but keeping the corner shops); and
- excludes residential garages behind Minorca Road.

8.43 These changes to exclude predominantly residential rather than commercials are appropriate. The proposed CAA/PSA includes the existing PSF. This area includes the main concentration of retail uses and appears appropriate.

Cobham

8.44 The combined floorspace capacity projection for the Cobham/Oxshott zone up to 2040 is only 198 sq.m gross. If the shop vacancy rate in Cobham reduced to 10% then reoccupied space could total 200 sq.m gross, which can accommodate the capacity projection.

8.45 The current centre boundary for Cobham is tightly drawn, although it includes the Cobham Village Hall and Centre for the Community site (proposed to be allocated in the new Plan) at the north and Holly Hedge car park at the south of the centre.

8.46 The Submission Policies Map proposed to exclude the new residential homes at Cedar Road from the centre boundary. The proposed CAA/PSA includes the existing PSF. These boundary designations appear to be appropriate.

Esher

8.47 The combined floorspace capacity projection for the Esher/Hersham zone up to 2040 is only 395 sq.m gross. If the shop vacancy rate in Esther reduced to 10% then reoccupied space could total 1,700 sq.m gross. Esher could increase its market share of expenditure and absorb growth from Hersham other parts of the Borough.

8.48 The current centre boundary for Esher is widely drawn and includes Esher Green park in the west and the Elmbridge Civic Centre complex in the northeast of the centre. The Submission Policies Map proposed the following changes:

- expansion to include a pond behind Elmbridge Civic Centre;
- expansion to incorporate the car park behind Waitrose; and
- contraction to the south of the centre past Belvedere Close to exclude residential uses and a car park.

8.49 Given the high level of vacant units in the centre, the Council could reconsider the need to expand the centre boundary. The proposed CAA/PSA includes the existing PSF, except for a few units at the top end of High Street / King George's Walk. These uses could be retained and included with the CAA/PSA.

East Molesey

8.50 The combined floorspace capacity projection for the East Molesey/Thames Ditton zone up to 2040 is only 306 sq.m gross. This projection could be accommodated in vacant shop unts in East Molesey, Thames Ditton and/or Molesey Bridge Road.

8.51 East Molesey's centre boundary is tightly drawn around the retail/commercial area. No changes were proposed to the centre boundary in the Submission Policies Map, due to surrounding residential uses. The centre is relatively small and a separate CAA/PSA appears to be unnecessary.

Hersham

8.52 As indicate above, the combined floorspace capacity projection for the Esher/Hersham zone up to 2040 is only 395 sq.m gross. This capacity projection can be accommodated in vacant units in Esther.

8.53 Hersham's centre boundary is widely drawn. The Submission Policies Map proposed changes to exclude both parks (Hersham Green and Memorial Garden) and all units on Queens Road (save The Watermans Arms pub overlooking the central roundabout) and Primrose Road to the west of the centre, which are predominantly in residential use. Taking these proposed changes into account, there is no need for a separate CAA/PSA boundary.

Local Centres

8.54 As indicated above, floorspace capacity can be accommodated in vacant premises within the main town and district centres. No significant expansion is necessary to accommodate growth. However, existing shops and services in local centre should be included in local centre boundaries and protected by plan policies. The centre by centre analysis is set out below.

8.55 Claygate's centre boundary is relatively tight, but there is scope to further contract the centre to exclude residential buildings at Claycorn Court and south of the centre at Hare Lane and Albany Crescent. There is a concentration of town centre uses at the High Street / The Green towards the east, about 400 metres from the centre. The Council could consider designating this area as a separate local centre.

8.56 East Molesey Bridge Road's centre boundary is relatively tightly drawn, but there may be scope to exclude number 76 Bridge Road (residential) and the small green space opposite.

8.57 Thames Ditton's centre boundary is widely drawn. The Submission Policies Map proposed to include parts of Ashley Road and exclude the northern part of High Street, because these areas are predominantly residential. The expansion at Ashley Road is also predominantly residential and this change could be reconsidered.

8.58 Hinchley Wood has a relatively widely drawn boundary. Proposed changes to include a dental surgery at Number 5 Manor Road North and exclude Hinchley Manor residential blocks appear to be appropriate.

8.59 Oatlands also has a relatively widely drawn centre boundary. Proposed changes to exclude residential areas at Oatlands Drive / Vale Road junction and Elizabeth Court, 117 Oatlands Drive appear to be appropriate.

8.60 Oxshott has a relatively tightly drawn centre boundary. Proposed changes to exclude green space at the junction of High Street / Steel's Lane and residential uses at Oakshade Road appear to be appropriate.

8.61 Walton Halfway also has a tightly drawn centre boundary. Proposed changes to extend the boundary to the west of the centre, to include the Kia Motors headquarters and Fernleigh Community Hub appear to be appropriate. The proposed exclusion of garages and outbuildings at Betley Court also appear to be appropriate.

8.62 Walton Terrace Road has a relatively widely drawn centre boundary. Proposed changes to remove residential uses at Sunbury Lane, Thames Mead and 42 Terrace Road (Cranbourne Close) appear to be appropriate. As proposed, the Co-op supermarket car park should be included in the boundary.

8.63 Weybridge Queens Road has a relatively tightly draw centre boundary, Proposed changes to exclude Ivy Cottage (residential) on South Road, Dial Stone Court (retirement residences) on Oatlands Avenue, the Toshiba offices (currently vacant) on Prince's Road (plus 4 Prince's Rd) and green space behind the United Reform Church appear to be appropriate changes.

Controlling the mix of uses

8.64 The ability to control the mix of uses within centres and designated frontages has changed significantly since the Elmbridge Core Strategy was adopted in 2011. Current and future market trends; the low retail floorspace capacity projections; and changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered.

8.65 A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town, district and local centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

8.66 Considering the changes to the UCO and PDR, restrictive policies could be unsound and unimplementable for existing premises. Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA) within centres to protect their vitality and viability. However, Article 4 directions cannot prevent movement within the same use class i.e. new Class E. The loss of retail uses to other sub-categories of Class E cannot be controlled.

8.67 In some circumstances, the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre, for example, in Esher.

8.68 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this is not affected by changes to the Use Classes Order or Permitted Development Rights. Other non-Class E uses at ground floor level can be controlled within the designated frontages.

8.69 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e. where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions / legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations.

8.70 The new Local Plan could designate CAAs/PSAs in designated Town Centres to protect the retail function of the area. The introduction of a CAA/PSA is not considered necessary for the district and local centres, where retail uses are dispersed throughout these smaller centres. The continued designation of primary and secondary frontages, in addition to a CAA/PSA, is no longer consistent with the NPPF and is probably unnecessary due to the changes to the UCO. The designated town centre boundaries in District and Local Centres could be adopted to control the mix of uses, rather than a CAA/PSA or frontage designations.

8.71 Strengthening or retaining the current CS18 policy approach, which gives preference to retail uses within PSFs and town centre uses within SSFs, will be difficult to implement following the changes to the UCO. The floorspace projections suggest some shift from retail to non-retail use may be appropriate. A laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres is unnecessary because shop vacancy rates are generally low within the Borough and this approach could undermine the retail role of some centres.

Recommended policy approach

8.72 A designated CAA or PSA is recommended in designated town centres. Within these areas the objective should be to maintain and enhance the retail offer and other uses within Class E. Development should maintain an active frontage. Within other parts of the town centres and in district and local centres, a wider range of main town centre uses, including Class E, Sui Generis and Class F, could be promoted and protected.

8.73 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the CAA/PSA or wider centre boundary could be permitted subject to criteria relating to:

- individual or cumulative impact on neighbouring amenity;
- adverse impact on the vitality and viability of the centre as a whole;
- provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
- adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.

8.74 Encouraging Class E uses within the CAA/PSA will include non-retail main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses, including pubs, bars, hot food takeaways and other Sui Generis uses, can be controlled in the CAA/PSA, but could be encouraged to locate in other parts of the town centres where appropriate i.e. preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages.

8.75 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of the centres. However, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within the centre.

8.76 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e. changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in centres.

9.0 Conclusions and recommendations

9.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Elmbridge Borough. It explores how the identified growth and change across the Borough could be accommodated and the future role of the centres.

Meeting Elmbridge Borough's needs

9.2 When planning for growth in main town centre uses, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections (positive and negative) for retail and food/beverage floorspace in 2030, 2035 and 2040 are summarised in Tables 8.1 and 8.2.

Table 9.1 Combined retail and food/beverage floorspace requirements (sq.m gross) - cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Total (sq.m gross)
By 2030	-1,445	-925	1,607	**-763**
By 2035	-1,915	-1,671	2,948	**-638**
By 2040	-2,013	-1,563	4,578	**1,002**

Table 9.2 Combined floorspace requirements by location (sq.m gross) - cumulative

	By 2030	By 2035	By 2040
1 - Weybridge/Brooklands	-523	-751	-520
2 - Walton-on-Thames	-32	98	527
3 - East Molesey/Thames Ditton	-38	73	306
4 - Claygate/Hinchley Wood	-20	-11	97
5 - Esher/Hersham	-68	36	395
6 - Cobham/Oxshott	-82	-84	198
Total	**-763**	**-638**	**1,002**

9.3 The leisure expenditure projections indicate there may be potential to accommodate an additional 850 sq.m gross of commercial leisure and cultural floorspace by 2030, increasing to 1,650 sq.m gross by 2035 and then 2,350 by 2040. This additional floorspace could include:

- one large or two medium sized health and fitness facilities;
- a small tenpin bowling facility within a multi-use leisure facility;
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

9.4 Long-term floorspace capacity forecasts beyond 2035 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long-term projections must be treated with caution and kept under review. The capacity figures suggest there is limited need for additional floorspace up to 2035. The longer terms projections to 2040 suggest a modest requirement for 1,002 sq.m gross of retail/food and beverage floorspace plus 2,350 sq.m gross. The new Local Plan could seek to accommodate for growth beyond ten years and potentially up to 2040.

9.5 The combined total projection to 2040 is about 3,350 sq.m gross. This projection could be accommodated in vacant town centre units. The capacity projections suggest there is no pressing requirement to allocate sites for major retail/leisure development to accommodate projected growth for the next ten years and beyond. The priority will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Future planning policy

Hierarchy of centres

9.6 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

9.7 The proposed changes to the designation of town, district and local centres in Elmbridge Council's former Draft Local Plan submission are appropriate and sound.

Impact and sequential tests

9.8 The new Local Plan should refer to the sequential and impact tests and which designated centres need to be considered. New Local Plan policies relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should refer to all main town centre uses as described in the NPPF glossary. New Local Plan policies should reflect the NPPF wording.

9.9 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Elmbridge Borough because this scale of development would exceed the retail and food beverage projections for all centres in the Borough. A consistent lower impact threshold of 500 sq.m gross could be applied across the authority area.

Town and local centre boundaries

9.10 The new Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and a Core Activity Areas (CAA)/Primary Shopping Area (PSA) in the designated Town Centres remains sound but is not necessary in other smaller centres.

9.11 The negative retail floorspace capacity projections, suggest there is no need to extend centre or CAA/PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary. Some minor amendments to centre boundaries could be considered.

Controlling the mix of uses

9.12 The designated CAA/PSAs should be retained. In this area retail and other Class E uses should be maintained and enhanced. Development should maintain an active frontage. Within other parts of the town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.

9.13 Proposals that require planning permission that would result in the loss of these uses at ground floor level in all designated centres could only be permitted subject to criteria relating to:

- individual or cumulative impact on neighbouring amenity;
- adverse impact on the vitality and viability of the centre as a whole;
- provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
- adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.

Future monitoring

9.14 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium and long-term up to 2040. Longer-term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 and cost-of-living crisis that will need to be monitored. Longer-term projections after 2035 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

9.15 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area

Table 1 Study Area Zones

Zone	Wards	Household survey sample
1. Weybridge	E05011088 - Weybridge Riverside E05011089 - Weybridge St George Hill E05011082 - Oaklands & Burwood Park	110
2. Walton-on-Thames	E05011085 - Walton Central E05011086 - Walton North E05011087 - Walton South	115
3. Molesey / Thames Ditton	E05011080 - Molesey East E05011081 - Molesey West E05011084 - Thames Ditton	115
4. Claygate	E05011074 - Claygate E05011078 - Hinchley Wood & Weston Green E05011079 - Long Ditton	105
5. Esher / Hersham	E05011076 - Esher E05011077 - Hersham Village	100
6. Cobham / Oxshott	E05011075 - Cobham & Downside E05011083 - Oxshott & Stoke D'Abernon	100
7. Shepperton	E05007369 - Shepperton Town E05007366 - Halliford & Sunbury West E05007367 - Lakeham & Shepperton Green	100
8. Runnymede	E05012887 - Addlestone North (Runnymede) E05012888 - Addlestone South (Runnymede) E05012889 - Chertsey Riverside (Runnymede) E05012889 - Chertsey St Annes (Runnymede) E05012896 - New Haw (Runnymede)	135
9. Byfleet	E05010795 - Byfleet & West Byfleet (Woking) E05010803 - Pryford (Woking) E05014956 – Send & Lovelace (Guildford)	120


ZONE 7 - SHEPPERTON
ZONE 8 - RUNNYMEDE
ZONE 2 - WALTON-ON-THAMES
ZONE 3 - MOLESEY / THAMES DITTON
ZONE 4 - CLAYGATE
ZONE 5 - ESGER / HERSHAM
ZONE 1 - WEYBRIDGE
ZONE 6 - COBHAM / OXSHOTT
ZONE 9 - BYFLEET

Key

Elmbridge Local Authority Boundary

Zones

Zone 1 - Weybridge

Zone 2 - Walton-on-Thames

Zone 3 - Molesey / Thames Ditton

Zone 4 - Claygate

Zone 5 - Esger / Hersham

Zone 6 - Cobham / Oxshott

Zone 7 - Shepperton

Zone 8 - Runnymede

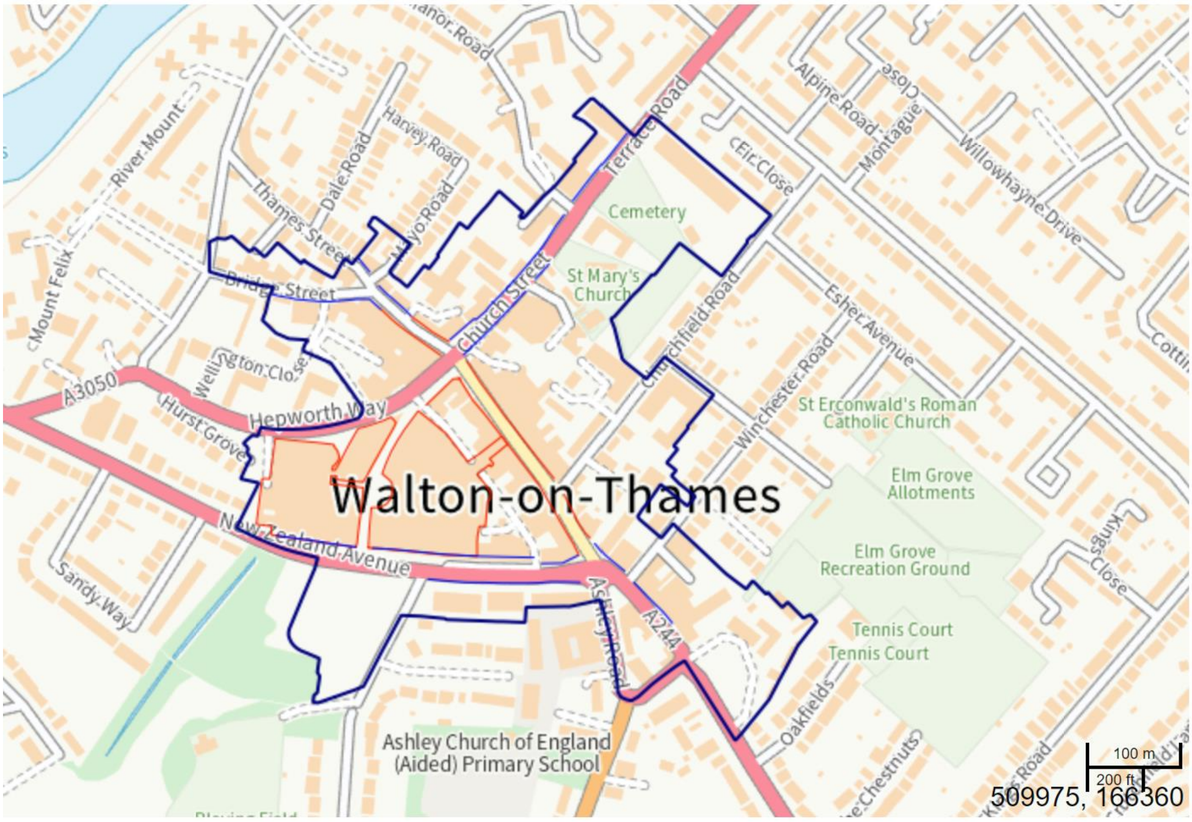
Zone 9 - Byfleet

Appendix 2 Centre Health Checks

WALTON-ON-THAMES

Walton-on-Thames in the northeast of the Borough. It is the largest centre in the Borough and is currently the only designated ‘Town Centre’. The centre is defined by the blue line in Figure WA1 below.

Figure WA1 Centre boundary and shopping frontages – Walton-on-Thames



Source: Elmbridge Core Strategy 2011-2026.

The Elmbridge Core Strategy 2011-2026 Policy Map designates Primary and Secondary Shopping Frontages as shown on the plan above by the red and light blue lines respectively. The Primary Shopping Frontage consists of The Heart Shopping Centre, the High Street, and the southeastern portion of Bridge Street. New Zealand Avenue, Church Street, and the northwestern portion of Bridge Street are designated as Secondary Shopping Frontage. Walton is relatively compact, with The Heart Shopping Centre forming a central hub, facilitating connections to the High Street, Hepworth Way and New Zealand Avenue.

Mix of uses and vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

Walton has 195 retail and service units, the highest of all the centres in Elmbridge. The mix of uses is set out in Table WA1, which is compared to the Borough and UK averages. There were 27 vacant units in September 2024, a vacancy rate of 13.8%, which is slightly below both the Borough and UK averages. This suggests the supply of shop premises is broadly in line with operator demand. The Elmbridge Retail Assessment 2016 indicated a lower vacancy rate (6.5%)

significantly below the national average (11.4%) at that time, which suggests the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table WA1 Mix of retail and service uses – Walton-on-Thames

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	8	4.1	6.0	9.8
Comparison retail	56	28.7	29.9	28.4
Financial/Professional	7	3.6	4.3	8.5
Restaurants/Cafés	35	17.9	15.5	10.7
Pubs/Bars	4	2.1	1.7	5.1
Hot food takeaways	7	3.6	3.1	6.4
Other non-retail services	51	26.2	25.7	16.3
Vacant	27	13.8	13.9	14.8
Total	**195**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

The composition mix of uses in Walton is similar to the Borough average, which has a number of notable differences to the UK average. Walton's proportion of comparison retail units reflects both averages, the proportion of convenience retail units is lower than the Borough average and less than half the UK average. However, a large Sainsbury's supermarket is in the Heart Shopping Centre, with Aldi and M&S Foodhall also present. The proportion of financial/professional services is less than half the UK average. The food and beverage offer in Walton generally similar to the Borough's average, but has a higher proportion of restaurants/cafés and lower proportions of pubs/bars and hot food takeaways. Over a quarter of Walton's units are other non-retail services, much higher than the national average but aligned with the Borough average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables WA2 and WA3.

Table WA1 shows Walton has 56 comparison goods, which is the highest in the Borough. Weybridge is the next highest with 49 outlets. The centre has 11 of the 14 Goad Plan comparison shop categories represented and the choice of outlets in most categories is reasonable. Absent categories are cars/motorcycles/accessories; variety/department/catalogue and florists/ nurserymen/seedsmen.

When compared with the Borough and UK averages, Walton has higher proportions of charity/second-hand shops (the highest in the Borough); chemists/drugstores/opticians; furniture/carpets/textiles; toys/hobby/cycle/sports (10.7%) and books/art/cards/ stationers. There are lower proportions of clothing/footwear; china/glass/gifts and other comparison goods (1.8%).

Walton has a reasonable selection of non-retail services (104 units) as shown in Table WA3, also the highest in the Borough. However, there are no travel agents or launderettes/dry cleaners. Consistent with other main centres in the Borough, there is a strong representation of restaurants/cafés, but much lower representations of pubs/bars and hot food takeaways.

When compared with the UK, Walton has an above-average provision of estate agents/valuers and hairdressers/beauty parlours. In terms of financial services, including betting shops/casinos/amusements, Walton has below the national average, although still the highest in the Borough. Walton provides five banks and a building society, as well as professional services, such as solicitors.

Table WA2 Mix of comparison goods retail uses – Walton-on-Thames

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	7	12.5	14.2	20.8
Furniture, carpets and textiles	7	12.5	19.9	7.4
Books, art, cards and stationers	5	8.9	8.1	6.2
Electrical, music and photography	4	7.1	3.8	9.4
DIY, hardware and homeware	5	8.9	9.5	7.1
China, glass and gifts	1	1.8	3.3	5.8
Cars, motorcycles and accessories	0	0.0	1.9	1.3
Chemists, drugstores and opticians	8	14.3	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	0	0.0	2.4	2.1
Toys, hobby, cycle and sports	6	10.7	7.1	5.5
Jewellers	3	5.4	2.8	5.1
Charity and second-hand shops	9	16.1	12.3	10.0
Other comparison goods retailers	1	1.8	1.9	5.7
Total	**56**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Table WA3 Mix of non-retail service uses – Walton-on-Thames

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	35	38.9	35.6	25.1
Hot food takeaway	7	7.8	7.2	15.1
Public house / bar	4	4.4	3.9	11.9
Bank / other financial service	6	6.7	4.2	7.1
Betting shop / casino / amusement	2	2.2	1.6	3.6
Estate agent / valuer	9	10.0	11.4	7.3
Travel agent	0	0.0	0.7	1.4
Hairdresser / beauty parlour	27	30.0	31.7	27.1
Launderette / dry cleaner	0	0.0	3.6	1.5
Sub-total	**90**	**100.0**	**100.0**	**100.0**
Other non-retail services	14			
Total	**104**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Other non-retail service uses in Walton include fitness studios, funeral directors, charity offices, tailors, phone repair and key cutting shops. Walton also has Elmbridge Community Hall, the Walton Working Men's Club, a Post Office, a library, a cinema, places of worship, educational and play/gym facilities. The variety of uses reflects Walton's dual shopping and day-to-day service role.

Walton has the highest number of national multiples in the Borough, indicative of its position as the Borough's principal centre, complemented by a selection of independent shops. Most of the national multiple comparison stores are within The Heart Shopping Centre. The national multiple retailer and food/beverage outlets, shown in Table WA4.

Table WA4 Multiple retailers – Walton-on-Thames

Comparison		Convenience	Food and Beverage
Accessorize	Trespass	Aldi	Buenasado
Boots	Vision Express	Holland & Barrett	Burger King
Boots Opticians	Vodafone	Marks and Spencer	Caffe Nero
Card Factory	Waterstones	Poundland	Carluccio's
Carpetright	WHSmith	Sainsbury's	Costa
Claire's Accessories			Craft Union Pubs
Clarks			Five Guys
Dreams			KFC
EE			Kokoro
Jewson			McDonald's
Monsoon			Mooboo
New Look			Nando's
Next			Pizza Express
Pets at Home			Pizza Hut
Smiggle			Shepherd Neame Pubs
Specsavers			Starbucks
Sports Direct			Subway
Superdrug			Topps Pizza
The Fragrance Shop			Urban Village Pubs
The Works			Wagamama

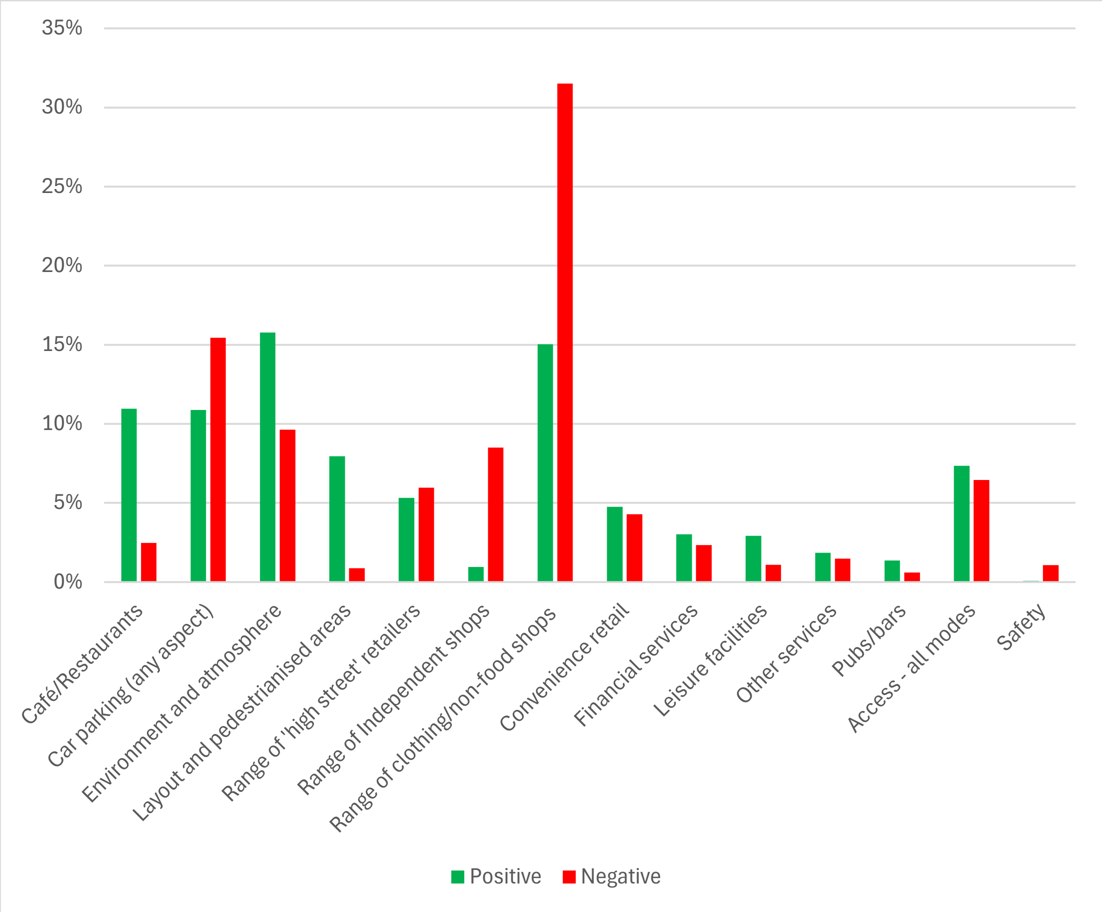
Source: Lichfields' site visit (September 2024).

Customer views

As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Walton in the last year. Around 53% of respondents in the study area had visited Walton, the highest of all centres in the Borough. Of those who had used shops/services in Walton, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Walton town centre and the negative factors where improvements were suggested are summarised and compared in Figure WA2 below.

Compared to other centres in Elmbridge, there were higher proportions of negative views about Walton, suggesting expectations are higher Walton as the largest centre. Nevertheless, views on Walton were generally mixed. The range of clothing and non-food shops generally attracted higher negative opinions, as well as the range of independent shops. Cafés and restaurants, and layout and pedestrianised areas attracted higher levels of positive comments. Environment and ambience and access were positive aspects on balance, but still attracted some suggestions for improvements. Car parking attracted mixed views, but more negatively on balance. Overall, taking all aspects that attracted over 5% of comments, four aspects were viewed more positively, with four viewed negatively. These results indicate mixed views about Walton town centre.

Figure WA2 Positive and negative factors mentioned by visitors about Walton (% of all visitors)



Source: NEMS household survey (August 2024).

The proximity of the centre to home (not included in graph above) was the most liked attribute (17.4%), followed by cafés and restaurants (11.0%), car parking (10.9%), and the attractiveness of the environment (8.4%).

In terms of improvements, 22.3% of respondents suggested reducing the number of shop vacancies in the centre (not included in graph above), followed by the provision of more/better clothes shops (15.7%) and more/better range of non-food shops (15.2%). Dissatisfaction with car parking was the next most mentioned issue (15.4%), which is broken down later. Opinions on accessibility and environment and ambience are also detailed below.

Customer activities and catchment area

The Council's 2016 Retail Assessment gave Walton Town Centre a convenience goods turnover of £56.4m in 2015, and a comparison goods turnover of £104.8m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £53.2m and £62.4m in this Study, demonstrating that food spending in the centre has broadly plateaued whilst comparison goods turnover has fallen, in line with existing national trends and reflecting the wider impacts of the Covid-19 pandemic and the cost-of-living crisis.

The household survey results indicate about 53% of study area respondents had visited shops, services or leisure facilities in Walton during the last year, which was significantly higher than the next most popular centre, Weybridge (43%). Most of these visitors to Walton live in the Walton area, in Zone 2 – Walton, but significant numbers also come from Zone 1 – Weybridge and Zone 3 – Molesey/Thames Ditton. Walton is the most popular destination in Zones 2 and 3, as well as Zone 7 – Shepperton, and is marginally more popular than Esher and Hersham in Zone 5 – Esher/Hersham. The results suggest it performs well as the main centre in the Borough, attracting visitors from across most zones.

Over 4% of households in the study area indicated that they do most of their non-food shopping in Walton, which was the highest of all centres within the Borough. Cobham attracted 3.2% and Weybridge attracted 2.5%. Destinations outside the Borough attracted much higher proportions i.e. Staines-upon-Thames 5.3% and Kingston-upon-Thames 14.3%.

Around 5.1% of households indicated Walton's Sainsbury's store was their main food shopping destination, and of those that reported grocery shopping was part of a linked trip, 8.5% said this took place in Walton town centre, which was the highest of all centres.

The breakdown of activities undertaken by visitors to Walton is shown and compared with the Borough average in Table WA5. The survey results indicate that Walton is a strong retail destination, with higher proportions undertaking food and non-food shopping as well as window shopping. Lower proportions undertake leisure activities in the centre, including cafés/pubs/restaurants, although financial/professional services are key activities. The numbers utilising other services in the centre is similar to the Borough average.

Table WA5 Activities carried out by visitors to Walton town centre (% of all visitors to each centre)

Activity	Walton	Average for all Centres
Shopping		
Non-food shopping	52.3%	41.1%
Food shopping	48.7%	37.6%
Visit the market	3.7%	1.6%
Window shop/browse	12.6%	9.2%
Click and collect	1.5%	0.7%
Leisure		
Go for a walk	5.6%	5.6%
Café/pub/restaurant	24.6%	37.0%
Leisure activity	10.5%	14.0%
Other services		
Banks/other financial institutions	11.8%	4.9%
Health facilities	6.7%	6.6%
Other services	5.5%	5.9%
Getting petrol	0.5%	0.1%
Post office	3.6%	3.2%
Library	2.7%	2.6%
Other activities		

Activity	Walton	Average for all Centres
Travelling to/from work	1.3%	3.3%
Education/school run	0.6%	0.6%
Visting family/friends	4.4%	5.8%

Source: NEMS household survey (August 2024).
* percentages add to more than 100% due to multiple activities.

The capacity analysis suggests Walton has a combined retail and food/beverage turnover of £180 million, relatively evenly split between convenience (33%), comparison (36%) and food/beverage (31%) turnover. This combined turnover is the highest of all centres in the Borough. The centre attracts 55% of its trade from the local Walton-on-Thames Zone 2. Walton attracts a reasonable level of trade from most of the nine area zones, indicating it have a Borough-wide shopping catchment area.

Rental levels

According to the Valuation Office Agency (VOA), Walton has Zone A retail rental values ranging from £250 to 450 per sq.m. These values are slightly below Cobham, Esher and Weybridge, but higher than the Borough's smaller centres. The highest values are within The Heart Shopping Centre (£400-£450 per sq.m), with New Zealand Avenue also having consistent values of £400 per sq.m. On Church Street, the highest values of £400 per sq.m are located closest to the High Street, decreasing to £250 per sq.m in peripheral areas. Similarly, Bridge Street has values of £350 per sq.m. closest to these crossroads, decreasing to £250 further northwest. Walton has a good mix of shop properties ranging in cost, suitable for both national multiples and small independent outlets.

Accessibility

Walton Railway Station is located just over one kilometre south of the centre. The route to the station has quality pavements through residential areas, although there is limited signage. The 458 and 555 bus routes provide a connection to the station every half-hour to an hour. Trains run every 10-20 minutes to London Waterloo, with connections every 30 minutes to Basingstoke and Woking. There are also connections to the Elmbridge centres of Weybridge, Hersham, and Esher.

There are eight bus stops located in the High Street, Ashley Road, Hepworth Way, Church Street and Bridge Street. Bus shelters are in good condition with clear signage. Routes connect to Hersham (458, 564, 555); Esher (458); Staines (400/813, 458); and Shepperton (400/813, 458, 555, N555); Thames Ditton (458); Kingston (458, 461); Chertsey, (461); Weybridge (461); West Molesey (461); Hampton Court (461); Heathrow Airport (555, N555); and Ashford (400/813, 555; N555). Overall, Walton has god levels of access by public transport.

For access by car, there is good signage to the centre and car parks, but there is some congestion on the approach via Church Street. The Heart Shopping Centre hosts the main car park, with other public parking available at Drewitts Court and Manor Road car park at Church Street. There is an additional car park at Ashley Park, a short walk from the centre. Customer parking (free for limited time) at Aldi and M&S is also available. The charging regime and number of spaces in town centre car parks is set out below in Table WA6.

Pedestrian accessibility within and around the centre is good, with The Heart Shopping Centre connecting the High Street, New Zealand Avenue, Hepworth Way and the main car parks. The centre is compact and there is a natural circuit for pedestrians with adequate crossings and good quality pavements. Consistent pedestrian flows were observed in the Primary Shopping Frontages. Church Street has lower pedestrian flows, with paving in poorer condition, and is dominated by vehicular traffic. Traffic levels are fairly high along New Zealand Avenue, but lower in the High Street.

As indicated, opinions on accessibility in Walton from survey respondents who had visited the centre in the last year were mixed. Layout and pedestrianised areas were viewed positively, with 6.6% of respondents who viewed the layout / shops being close together as a positive factor and 1.4% who viewed pedestrianised areas positively. Only 0.9% of respondents suggested expanding the pedestrianised areas.

Table WA6 Car parks – Walton town centre

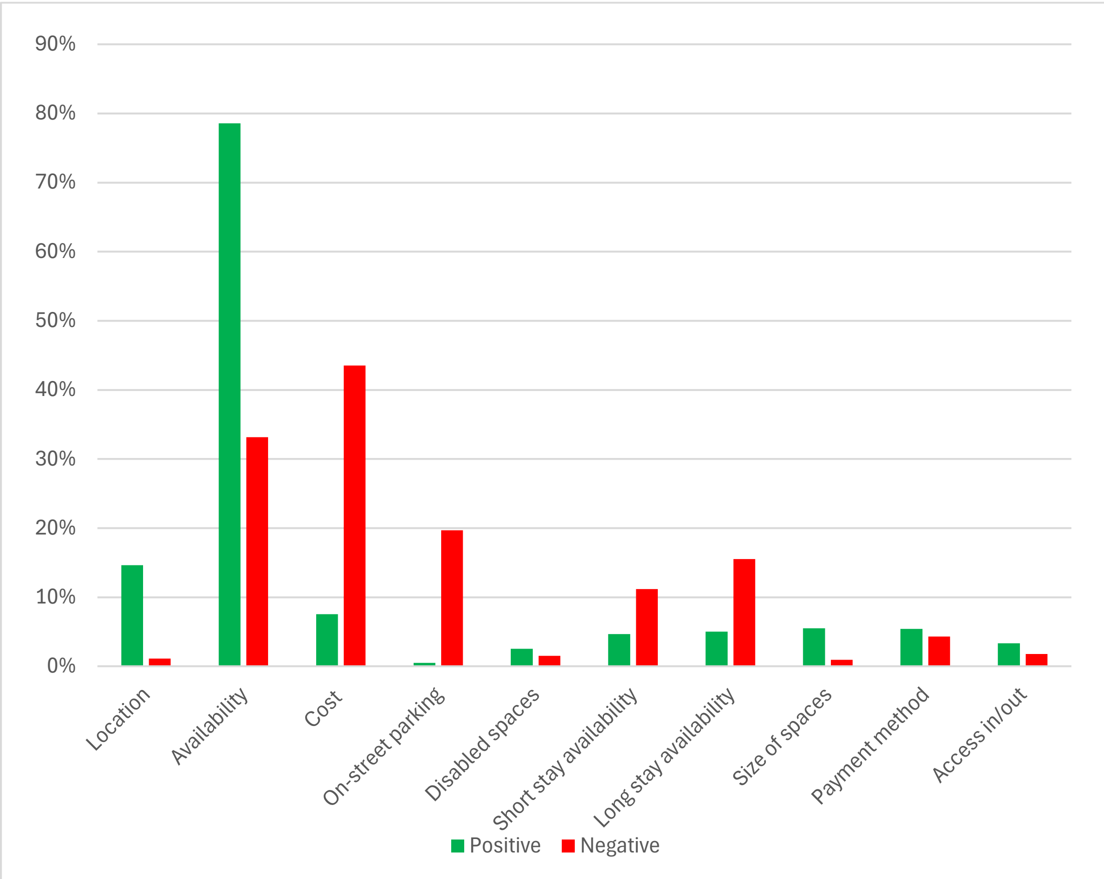
Car Park	No. of Spaces	Charge Regime
The Heart	800	Monday-Saturday: 0-1 hour - £0.80 1-2 hours - £1.50 2-3 hours - £2.50 3-4 hours - £3.50 4-5 hours - £6.00 5-6 hours - £10.00 Day rate - £15.00 Sundays and bank holidays: all day parking for £1
Drewitts Court	147	Sunday-Friday: Up to 30 minutes - free 1 hour - £1.80 2 hours - £3.50 3 hours - £5.20 4 hours - £6.50 5 hours - £8 9 hours - £8.70 Daily charge (over 9 hours) - £11.80 Saturday: 1 hour - free 2 hours - £1.80 3 hours - £3.50 4 hours - £5.20 5 hours - £6.50 9 hours - £8.70 Daily charge (over 9 hours) - £11.80

		In effect Monday-Saturday 8am-7pm and Sunday 10am-5pm. Charges do not apply on bank holidays and public holidays.
Manor Road	26	As above (council-run).
Ashley Park	53	As above (council-run).

Source: heartshopping.co.uk; elmbridge.gov.uk.

Excluding opinions on car parking, there were slightly higher levels of satisfaction than dissatisfaction regarding accessibility. Access by foot was viewed more positively (4.0%), with only 0.1% suggesting a need for improvements. Bus services were also viewed slightly more positively, with 1.3% satisfied and 0.9% suggesting improvements. Traffic congestion and access by car was viewed negatively by 4.6% of respondents, with only 1.5% indicating satisfaction for this aspect. However, this level of dissatisfaction is lower than other centres in the Borough.

Figure WA3 Positive and negative factors mentioned by visitors about car parking in Walton town centre (% of those who said 'car parking' as a positive/negative factor)



Source: NEMS household survey (August 2024).

Bicycle access attracted a small number of positive views (0.5%) and there was slight dissatisfaction with access by train (0.7%). Overall, congestion and improvements to access by car were the most significant suggested improvements, with access by foot the factor viewed most positively.

Survey respondents' views on car parking in Walton are shown below in Figure WA3. In general, there were mixed views regarding car parking in Walton with 10.9% of visitors commenting positively and 15.4% suggesting improvements are needed. Walton has the second highest levels of dissatisfaction compared to satisfaction of the main centre in the Borough, similar to Weybridge which had 12.5% satisfaction compared to 18.6% dissatisfaction. Specific factors liked and disliked on parking are broken down in Figure WA3 below.

Visitors were generally satisfied with the availability of parking spaces in Walton, and the location of parking was judged positively. The cost of parking was viewed negatively, split into 22.1% suggesting it should be free and 21.4% suggesting charges should be reduced. The availability of short and long stay spaces were both viewed negatively, despite an overall positive view on the general availability of spaces. However, the results indicate dissatisfaction with the availability of on-street parking. Other suggestions made were to include a better range of electric charging points (4.3%), the repainting of parking bays (1.9%), and better upkeep/maintenance (1.6%). The parking app system was viewed positively (5.4%).

Overall, accessibility to and within Walton is good. Parking availability is on balance viewed positively, but the cost of parking is the main concern.

Environment and ambience

Walton is an attractive town centre with signs of recent investment, especially at The Heart Shopping Centre.

Of the household survey respondents who had visited Walton centre in the past year, the attractiveness of the environment was the fourth most liked attribute (8.4%). Other factors liked that related to the public realm were the atmosphere (3.2%), quiet/not too busy (2.6%), open/green spaces (1.2%) and the cleanliness and maintenance of the centre (1.2%).

The most mentioned improvements suggested to in Walton were the reduction in the number of vacancies. Reducing congestion was also suggested as an improvement by 4.6% of respondents, although this was generally in relation to accessibility of the centre by car. Only 0.9% of respondents suggested expanding the pedestrianised areas, suggesting vehicular traffic has limited impact on the centre's atmosphere and shopping experience. Other suggestions included to update/refurbish the shopping area (3.2%), improve the cleanliness and maintenance of the streets (2.5%) and make the environment more attractive (2.5%). Cleanliness and maintenance was viewed more negatively than positively, but on balance, the environment was viewed positively by survey respondents.

Occurrence of crime

Walton has a higher crime rate when compared with other centres in Weybridge. It has a crime rate of 109 per 1,000 people, compared with the Surrey average of 62 per 1,000 (Crimerate.co.uk - 2024). Within Elmbridge, Cobham has the next highest crime rate at 81 per 1,000. Within the centre 39 crimes were reported during July 2024 (Police.uk). There were hotspots on Church Street and within The Heart, which had five counts of criminal damage.

Figures for June were similar, with 37 crimes reported throughout the centre, including five counts of shoplifting within The Heart. In May, 51 crimes were reported, with six counts of shoplifting in The Heart. Walton was the only centre within Elmbridge where crime was raised by survey respondents, with 1.1% suggesting improvements to security and safety would encourage them to visit the centre more often. A small number of respondents commented positively on safety (0.1%).

SWOT analysis

Walton's Strengths

- Performs well as the main and most popular centre in the Borough, attracting visitors across all zones. It attracts the highest numbers of people undertaking their main non-food shopping in the Borough.
- A good mix of shop properties ranging in cost, suitable for national multiples and small independent outlets.
- Functions as a Borough hub for financial services.
- The centre is well laid out, compact arrangement with good connectivity and quality pedestrianisation within The Heart shopping centre.
- The environment and urban realm are attractive and is well maintained.
- Good bus links, with stops at convenient locations throughout.
- The Sainsbury's store acts as an anchor, encouraging convenience shoppers to visit the rest of the centre.
- Good provision of off-street car parking.
- A good diversity of retail, service., educational, community and sport/leisure facilities.
- Good provision of café/restaurants.

Walton's Weaknesses

- Whilst the vacancy rate is below the UK and Borough averages, there are vacancy clusters within The Heart Shopping Centre.
- A low number of pubs/bars to support the evening economy.
- Higher levels of dissatisfaction with the range of shops in Walton, for example clothing shops and non-food shops in general.
- Walton attracts a lower number of non-food shopping trips from the study areas than larger centres at Staines-upon-Thames and Kingston-upon-Thames.
- Visitors are generally dissatisfied with the provision of on-street parking and the cost of car parking.

Walton's Opportunities

- Vacant shop premises are available to attract new investment and expand the range and choice of facilities.
- Opportunity to improve the centre's environment by introducing more tree planting and landscaping.

- Improving signage to the town centre from the station and increasing the frequency of buses on this route could increase visitor numbers and improve sustainable connections to the centre.

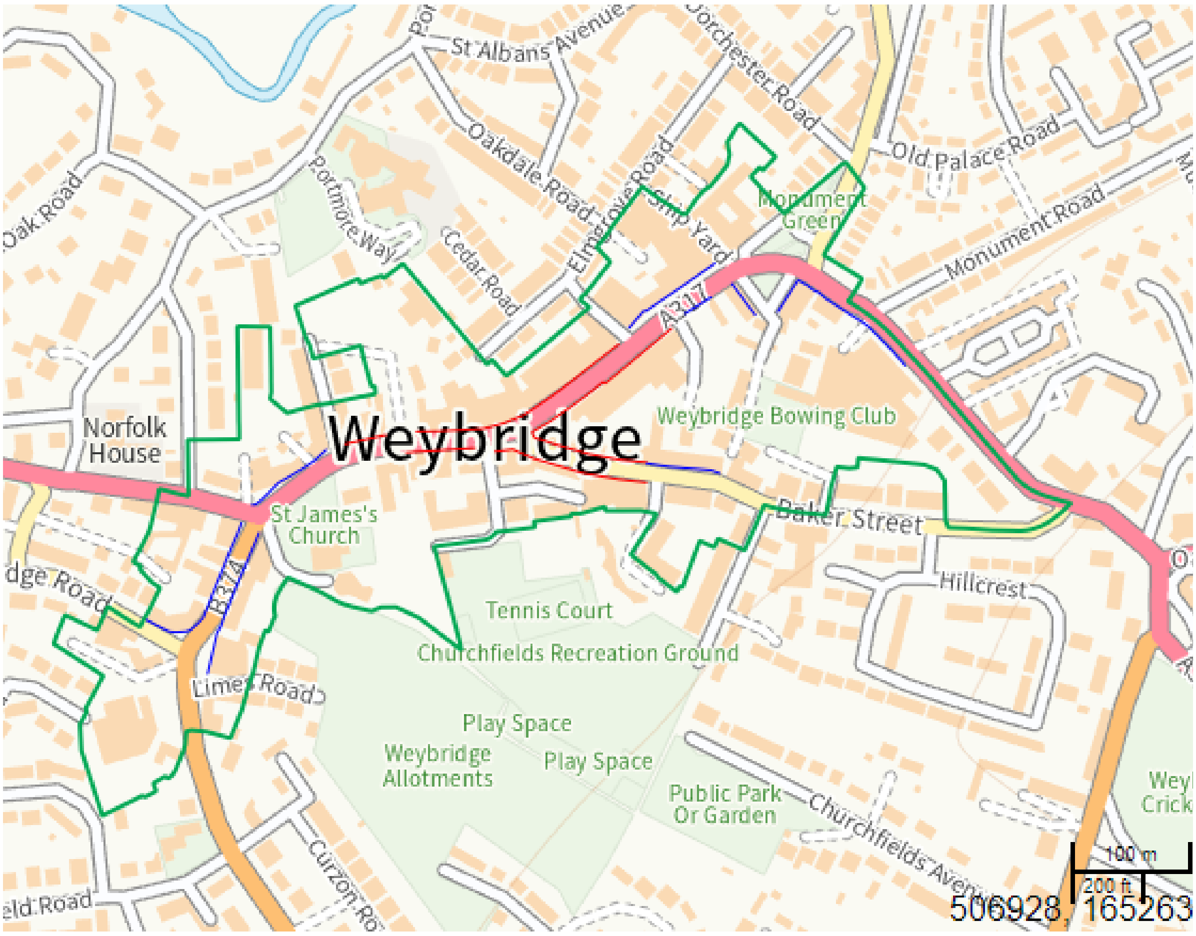
Walton's Threats

- Higher levels of crime rate may deter visitors.
- The continued trend of banks consolidating into larger centres may affect Walton's six banks.
- The polarisation of national retail multiples in larger centres could result in store closures.
- Vacant units in The Heart Shopping Centre could deter new investment.

WEYBRIDGE

Weybridge is the second largest centre in Elmbridge, located in the northwest of the Borough. It is currently designated a 'District Centre' with proposals to upgrade it to a 'Town Centre'. The centre is defined by the green line in Figure WE1 below.

Figure WE1 – Centre boundary and shopping frontages – Weybridge



Source: Elmbridge Core Strategy 2011-2026.

The centre is generally linear in form, along the A317 (Church Street / High Street / Monument Green / Monument Hill), with a fork along Baker Street. The centre boundary is defined by the green line in Figure WE1. The Elmbridge Core Strategy 2011-2026 designates Primary (red line) and Secondary (blue line) Shopping Frontages for the centre, with the majority of Primary Frontage located on Church Street and western portions of the High Street and Baker Street. The centre benefits from green space at Monument Green and direct access to Churchfields Recreation Ground.

Mix of uses and vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

Weybridge has 157 retail and service units, the second highest number in Elmbridge. The mix of uses is set out in Table WE1, which is compared to the Borough and UK averages. There were 23 vacant units within the centre in September 2024, a vacancy rate of 14.6%, which is the second highest rate in the Borough but still similar to the Borough and UK averages. This suggests the supply of shop premises is broadly in line with operator demand. However, in the Elmbridge Retail Assessment 2016, a lower vacancy rate (9.0%) which was below the national average (11.4%) at the time, which suggests the centre has not fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis. There are more recent signs of recovery in Weybridge e.g. refurbishment and new occupiers. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables WE2 and WE3.

Table WE1 Mix of retail and service uses – Weybridge

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	13	8.3	6.0	9.8
Comparison retail	49	31.2	29.9	28.4
Financial/Professional	8	5.1	4.3	8.5
Restaurants/Cafés	26	16.6	15.5	10.7
Pubs/Bars	3	1.9	1.7	5.1
Hot food takeaways	3	1.9	3.1	6.4
Other non-retail services	32	20.4	25.7	16.3
Vacant	23	14.6	13.9	14.8
Total	**157**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Table WE2 Mix of comparison goods retail uses – Weybridge

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	8	16.3	14.2	20.8
Furniture, carpets and textiles	12	24.5	19.9	7.4
Books, art, cards and stationers	6	12.2	8.1	6.2
Electrical, music and photography	3	6.1	3.8	9.4
DIY, hardware and homeware	4	8.2	9.5	7.1
China, glass and gifts	3	6.1	3.3	5.8
Cars, motorcycles and accessories	0	0.0	1.9	1.3
Chemists, drugstores and opticians	4	8.2	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	1	2.0	2.4	2.1
Toys, hobby, cycle and sports	1	2.0	7.1	5.5
Jewellers	0	0.0	2.8	5.1
Charity and second-hand shops	6	12.2	12.3	10.0
Other comparison goods retailers	1	2.0	1.9	5.7
Total	**49**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

The composition mix of uses in Weybridge is similar to the Borough averages, which has a number of notable deviations from the UK average. The proportion of financial/professional services is higher than the Borough average but lower than the UK average. The food and beverage offer in Weybridge is similar to the Borough's averages, with a higher proportion of restaurants/cafés and lower proportions of pubs/bars and hot food takeaways than the national average. Weybridge has the lowest proportion of other non-retail services in the Borough, but still above the national average. Weybridge hosts two major supermarkets (Waitrose and Morrisons), which are further complemented by smaller convenience units to the southeast of the centre (Sainsbury's Local and Tesco Express).

Weybridge has the second-highest number of comparison retail outlets (49) after Walton (56), and has representation in 11 of the 14 Goad Plan comparison shop categories, as shown in Table WE2. However, the choice of outlets in some categories is limited. There is a good choice of furniture/carpets/textiles outlets; books/art/cards/stationers and charity shops. There are no outlets in the cars/motorcycles/accessories, variety/department/catalogue or jeweller categories.

Table WE3 Mix of non-retail service uses – Weybridge

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	26	42.6	35.6	25.1
Hot food takeaway	3	4.9	7.2	15.1
Public house / bar	3	4.9	3.9	11.9
Bank / other financial service	2	3.3	4.2	7.1
Betting shop / casino / amusement	1	1.6	1.6	3.6
Estate agent / valuer	6	9.8	11.4	7.3
Travel agent	0	0.0	0.7	1.4
Hairdresser / beauty parlour	18	29.5	31.7	27.1
Launderette / dry cleaner	2	3.3	3.6	1.5
Sub-total	**61**	**100.0**	**100.0**	**100.0**
Other non-retail services	11			
Total	**72**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Weybridge has a reasonable selection of non-retail services (72 units), but has no travel agents, as shown in Table WE3. As with the other centres in the Borough, there is a strong representation of restaurants/cafés – Weybridge has the highest proportion (42.6%), significantly above the national average (25.1%). There are lower representations of pubs/bars and hot food takeaways, although the former is slightly higher than the Borough average. Weybridge also has an above-average provision of estate agents/valuers, hairdressers/beauty parlours and launderettes/dry cleaners, but only one bank.

Weybridge has professional services, such as solicitors, surveyors, employment and insurance agencies. Other non-retail service uses in include tailors, cobblers, funeral directors, dog groomers and phone repair shops. Other community facilities include a library (currently being redeveloped), a Post Office, St James' Church and Hall, the Weybridge Scouts Hall and the Weybridge Conservative Club.

National multiple outlets are shown in Table WE4. Weybridge has a reasonable number of national multiples for a centre of its size, especially in the food/beverage category.

Table WE4 Multiple retailers – Weybridge

Comparison	Convenience	Food and Beverage
Blue Cross	COOK	Caffe Nero
Boots	Holland & Barrett	Costa
Cancer Research UK	Majestic Wine	Domino's
Clarendon Fine Art	Morrison's	Gail's
Oxfam	Waitrose	Giggling Squid
Richer Sounds		Kokoro
Robert Dyas		Megan's
Space NK		Pizza Express
Sweaty Betty		Pret a Manger
White Stuff		Starbucks
WH Smith		Subway

Source: Lichfields' site visit (September 2024).

Customer views

Around 43% of respondents in the study area had visited Weybridge, making it the second most visited centre, after Walton. Of those who had used shops/services in Weybridge, respondents were asked what they liked about the centre and what improvements would make them visit more often. These factors are compared in Figure WE2 below.

In general views are mixed, but satisfaction levels are slightly higher in Weybridge than for Walton and with similar levels of satisfaction as in Esher. The environment and atmosphere, the range of independent shops and cafés/restaurants were aspects with higher levels of satisfaction than dissatisfaction. Views were also more positive than negative in relation to the provision of convenience retail, the range of 'high street' retailers, pedestrianised areas and the layout of Weybridge. The range of clothing and non-food shops in general attracted marginally more positive views than negative. Whilst some respondents viewed parking positively, this was viewed negatively overall.

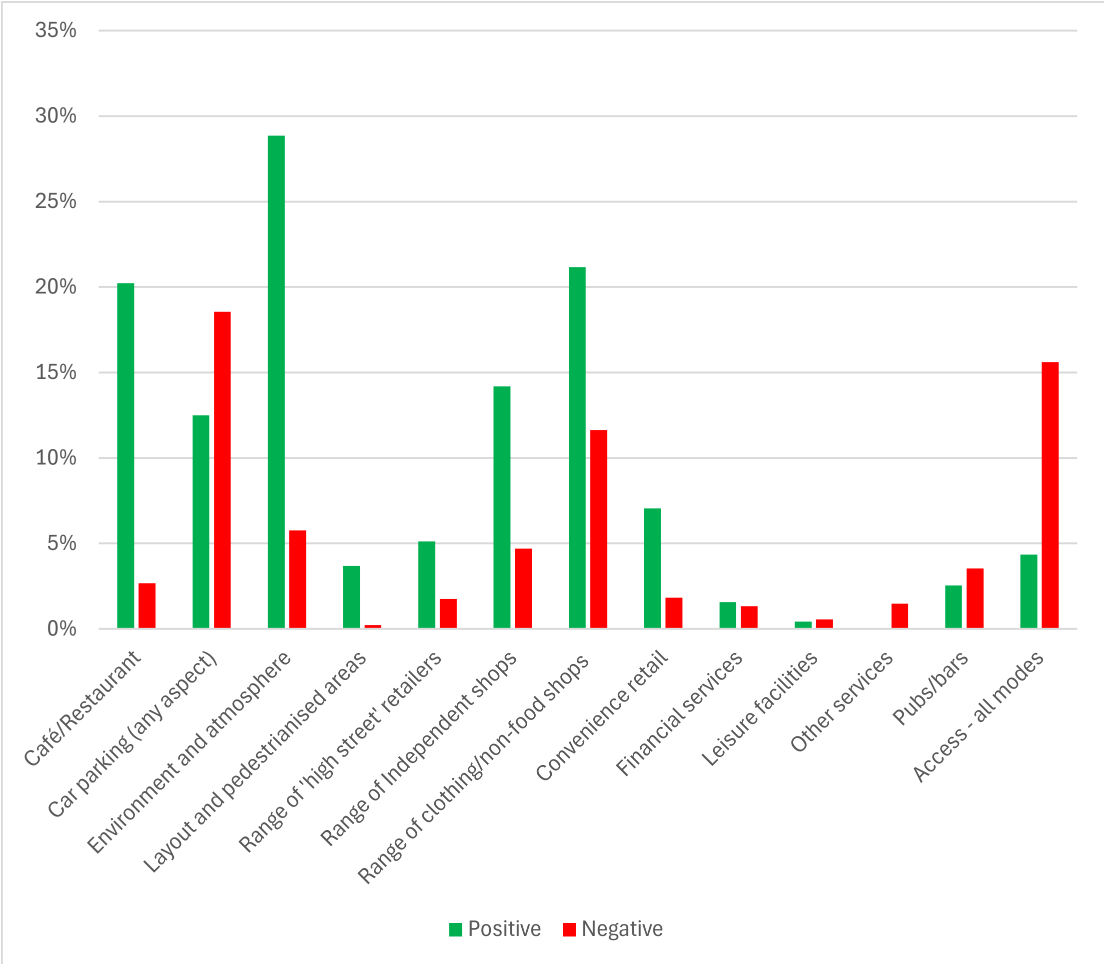
Taking all aspects that attracted comments from more than 5% of respondents, six aspects were viewed positively, and three negatively. This suggests Weybridge performs better than Walton, although there are higher levels of dissatisfaction in Weybridge with car parking and accessibility.

Cafés and restaurants were the most liked aspect in Weybridge (20.2%), followed by the range of independent shops (14.2%) and the attractiveness of the environment (13.6%). The range of non-food shops was generally viewed positively in Weybridge.

In terms of improvements, car parking was the most significant issue, with 18.6% commenting negatively, compared with 12.5% viewing this positively. The next most popular suggestion was to reduce traffic congestion / improve access by car (13.6%), followed by improving the range of non-food shops (7.8%). The survey results indicate satisfaction, generally, with the environment and provision of shops, while access and parking are suggested for improvements.

Details of opinions on the environment, accessibility, and car parking are included in the sections that follow.

Figure WE2 Positive and negative factors mentioned by visitors about Weybridge (% of all Weybridge visitors)



Source: NEMS household survey (August 2024).

Customer activities and catchment area

The Council's 2016 Retail Assessment gave Weybridge Town Centre a convenience goods turnover of £43.9m in 2015, and a comparison goods turnover of £43.5m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £35.2m and £41.3m in this Study. This drop-off in convenience goods spending indicates the continued success of the convenience offer at the Brooklands Centre, whilst the comparison goods turnover has shown only a minor reduction indicating the general resilience of Weybridge's comparison good offer.

Of the 43% of study area respondents who had visited shops, services or leisure facilities in Weybridge during the last year, the majority of visitors came from the local Weybridge area – Zone 1, with high proportions also coming from Zone 8 – Runnymede, where Weybridge was the most popular destination. Weybridge was also the most popular destination in Zone 9 – Byfleet. Overall, Weybridge was the second most popular destination in the Borough, appropriate to its size and range of shops and services.

Only 2.5% of households in the study area do most of their non-food shopping in Weybridge. This is still higher than the Borough's smaller centres, but lower than Cobham (3.2%) and Walton (4.3%). Destinations outside of the Borough remain the most popular choice overall (Kingston 14.3%; Staines 5.3%). Relatively high proportions of respondents indicated that supermarkets within Zone 1 (Weybridge) were their main non-food shopping destination, with the M&S at Brooklands Centre, Byfleet, attracting 1.9% of respondents, and the Tesco Extra achieving 3.0%. Survey results suggest the Morrisons and Waitrose act as anchor stores for the centre.

The breakdown of activities undertaken by visitors to Weybridge is shown and compared with the average for the Borough in Table WE5.

Table WE5 Activities carried out by visitors to Weybridge (% of all visitors to each centre)

Activity	Weybridge	Average for all Centres
Shopping		
Non-food shopping	52.1%	41.1%
Food shopping	39.4%	37.6%
Visit the market	1.9%	1.6%
Window shop/browse	10.0%	9.2%
Click and collect	1.2%	0.7%
Leisure		
Go for a walk	9.2%	5.6%
Café/pub/restaurant	34.4%	37.0%
Leisure activity	5.4%	14.0%
Other services		
Banks/other financial institutions	5.1%	4.9%
Health facilities	9.6%	6.6%
Other services	3.6%	5.9%
Getting petrol	0.0%	0.1%
Post office	2.4%	3.2%
Library	3.9%	2.6%
Other activities		
Travelling to/from work	3.2%	3.3%
Education/school run	0.0%	0.6%
Visting family/friends	5.3%	5.8%

Source: NEMS household survey (August 2024).
* percentages add to more than 100% due to multiple activities.

Weybridge has above-average proportions undertaking non-food shopping. The numbers visiting for food shopping or window shopping/browsing is similar to the Borough average. There were average numbers visiting pubs/cafes/restaurants, although lower proportions undertaking leisure activities. In terms of non-retail service uses, visiting banks/financial services was similar to the Borough average, but lower proportions utilised other services.

The capacity analysis suggests Weybridge has a combined retail and food/beverage turnover of over £133 million, relatively evenly split between convenience (27%), comparison (32%) and food/beverage (41%) turnover. This combined turnover is the third highest of all centres in the Borough. The centre attracts 57% of its trade from the local Weybridge Zone 2. Weybridge attracts most of its trade from the northwest of the Borough and Runnymede.

Rental levels

Data from the Valuation Office Agency (VOA) shows that Weybridge has prime Zone A shop rental values of £300-£600 per sq.m. Weybridge has some of the highest values in the Borough, similar to Esher and behind only to Cobham. The High Street hosts the highest rental values of £600 per sq.m. reducing to £400-475 per sq.m at the northeastern end. Values on Baker Street (£300-£500 per sq.m) and Church Street (£300-£550 per sq.m) increase with proximity to the High Street. The range of values in Weybridge provides a good mix of shops available for both national multiples and independent shops.

Accessibility

Weybridge Railway Station is located 0.8 km south of the centre, approximately 15 minutes by walking or five minutes by bus, which runs regularly (C1, 436, 517). Rail links connect to Woking, Basingstoke and Waterloo.

Bus stops are available at regular intervals at the Quadrant on Church Street/Heath Road, outside the Library on Church Street, and near to the Ship Hotel on the High Street. Services link the centre to Oxshott (C1, C2); Cobham (C1, C2); Leatherhead (C2); Woking (436); Byfleet (436, 637); Chertsey (461, 637); Walton (461); West Molesey (461); Molesey (514/515); Hampton Court (461); Kingston (461) and Hersham (514/515). C1 and C2 are part of a community-run bus service, the Chatterbus.

Weybridge is served by three Council car parks, with additional customer parking available at Morrisons and Waitrose. The number of spaces and charges is set out below in Table WE6.

Table WE6 Car parks – Weybridge

Car Park	No. of Spaces	Charge Regime
Churchfield Road	199 + 10 disabled bays	Monday-Sunday: 1 hour - £1.80 2 hours - £3.50 3 hours - £5.20 4 hours - £6.50 5 hours - £8 Up to 9 hours - £8.70 Over 9 hours - £11.80 Applicable Monday-Saturday 8am-7pm and Sundays only midday-5pm.
Monument Hill	14	4-hour maximum stay. As above, with Sunday applicable 10am-5pm.
Baker Street	55	As above, with Sunday applicable 10am-5pm.

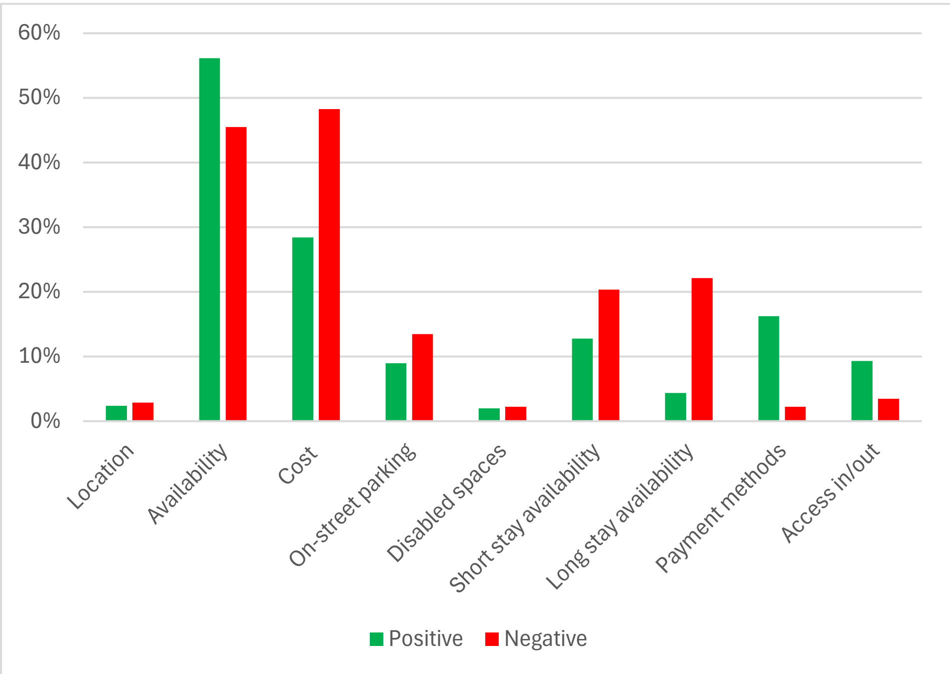
Source: Elmbridge.gov.uk

Traffic flows are relatively high along Church Street and the High Street, but there are frequent pedestrian crossings. Pavements are in reasonable condition although narrow in places. Pavements have been recently improved along part of the High Street, to incorporate on-street parking. Pedestrian flows are highest at the central part of Church Street, which is well connected to Churchfield Road car park and links to the High Street/Baker Street. The branched layout of the centre does not provide a natural circuit for pedestrians.

Accessibility was viewed negatively by some survey respondents, mainly due to negative views on accessibility by car, with 14.5% suggesting improvements were required, in particular due to congestion in the centre (13.6%). Weybridge has the highest levels of dissatisfaction with traffic congestion, followed by Esher (11.3%) and Cobham (9.6%). In terms of pedestrian accessibility within the centre, only 3.7% commented positively on the centre's layout. There were no suggestions for more pedestrianisation and few comments on the need for more road crossings.

Survey respondents' views on car parking in Weybridge are shown below in Figure WE3. Car parking (all aspects) was the most liked factor overall in terms of accessibility, with 12.5% of all respondents commenting positively. However, 18.6% of visitors suggested improvements are needed. This was also the highest percentage of all assessed centres in the Borough. Car parking related factors liked and disliked are broken down below.

Figure WE3 Positive and negative factors mentioned by visitors about car parking in Weybridge (% of those who said 'car parking' as a positive/negative factor)



Source: NEMS household survey (August 2024).

Opinions on car parking were generally mixed. Visitors were only slightly more satisfied than dissatisfied with the availability of parking spaces, and cost was a significant negative factor. This was split into 25.9% suggesting it is made cheaper and 22.4% that it is made free. The results also suggest a lack of availability of long stay parking. Short stay and on-street parking were also viewed negatively but less significantly. Payment methods were viewed positively, specifically relating to the ability to pay with cash (9.3%) and the functionality of the app system

(7%). Operating hours were an additional factor viewed positively (4.3%). There were no suggestions for improvements to car park design or maintenance.

Overall accessibility by car in Weybridge is viewed more negatively by survey respondents. Congestion and car parking have the highest levels of dissatisfaction of all assessed centres. Coar parking cost is a key issue raised.

Environment and ambience

Weybridge benefits from a diverse mix of uses, including independent cafés and restaurants which add vibrancy. Weybridge has a range of attractive historic buildings and there are signs of recent investment, including refurbished units on the High Street. The centre is generally well-maintained.

The centre benefits from access to Churchfields Recreation Ground and the landscaped areas of Monument Green. The provision of public conveniences at the Recreation Ground is a further asset. Although ample pedestrian crossings are available, reducing traffic speeds could improve the pedestrian environment.

The environment and atmosphere were viewed positively by survey respondents. Factors liked were attractive environment / nice place (13.6%), nice atmosphere / friendly people (7.5%), open/green spaces (2.7%), traditional/quaint (2.4%), quiet/not too busy (1.4%), clean/well-maintained streets (0.7%) and vibrant/busy (0.7%). The most suggested improvement to the environment was the reduction in the number of empty shops (4.3%). Other suggestions included the refurbishment of the shopping area (2.5%), improvements to cleanliness and maintenance (2.4%). Overall, Weybridge's environment is viewed positively.

Occurrence of crime

The crime rate in Weybridge is similar to other centres in Elmbridge, at 64 per 1,000 people (crimerate.uk), and is similar to the average for Surrey (62 per 1,000 people). It is ranked third overall within Elmbridge, above Esher (62 per 1,000 people) but below Cobham (81 per 1,000 people) and Walton (109 per 1,000 people).

Data from Police.uk shows that 15 crimes were reported within Weybridge centre in July 2024. Crimes were concentrated at the central part of the High Street, at Ship Yard, and Churchfield Road car park. Similar patterns can be observed in June and May 2024, with 17 crimes occurring in each of these months.

Crime and safety were not raised by survey respondents, suggesting that these are not key areas of concern in the centre.

SWOT analysis

Weybridge's Strengths

- High levels of visitor satisfaction with cafés/restaurants, the environment, and independent shops, with positive views overall on the range of shops.
- There is a good range of shops and services for its size.
- An attractive centre with a good quality shopping environment.

- Morrisons and Waitrose supermarkets act as anchors for the centre, generating linked purpose trips.

Weybridge's Weaknesses

- The highest levels of dissatisfaction with congestion and parking of all assessed centres, particularly the cost of parking.
- Less compact than other centres in Elmbridge and does not provide a natural circuit for pedestrians.

Weybridge's Opportunities

- Improving accessibility from the station to the centre could increase visitor numbers and improve sustainable connections to the centre.
- Reducing traffic speeds and widening pavements could further improve the shopping environment.

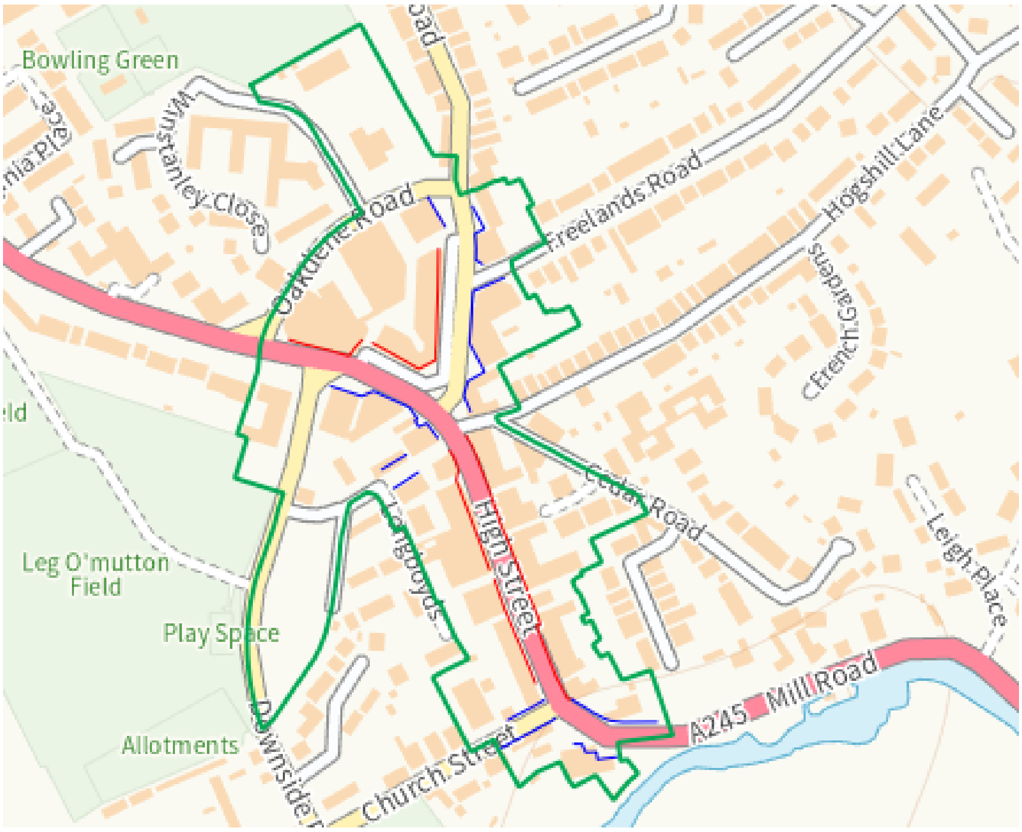
Weybridge's Threats

- There is only one bank in the centre and the continued trend of banks consolidating into larger centres may remove this facility.
- The polarisation of national retail multiples in larger centres could result in store closures.

COBHAM

Cobham is currently a designated 'District Centre' with proposals to upgrade it to 'Town Centre' status. The centre is defined by the green line in Figure C1 below.

Figure C1 Centre boundary and shopping frontages – Cobham



Source: Elmbridge Core Strategy 2011-2026.

Cobham is mainly linear in form and a Y-shape, running along the High Street and branching to Oakdene Parade and Anyards Road. A circuit is formed along the edge of the centre boundary by Oakdene Road, Hollyhedge Road and Downside Bridge Road. The Elmbridge Core Strategy 2011-2026 designates Primary (red line) and Secondary (blue line) Shopping Frontages, with the majority of Primary Frontage located on the High Street and Oakdene Parade. The centre benefits from access to green space at Leg O'Mutton field.

Mix of uses and vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

Cobham has 113 retail and service units, the third highest amongst the six centres in Elmbridge. The mix of uses is set out in Table C1, which is compared to the Borough and UK averages. There were 14 vacant units within the centre in September 2024, a vacancy rate of 12.4%, which is below the Borough and national averages. This suggests the supply of shop premises is broadly in line with operator demand. However, the vacancy rate was only 3.3% in the Elmbridge Retail Assessment 2016, much lower than the national average (11.4%) at the time.

Although the vacancy rate is lower than average, the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table C1 Mix of retail and service uses – Cobham

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	11	9.7	6.0	9.8
Comparison retail	41	36.3	29.9	28.4
Financial/Professional	1	0.9	4.3	8.5
Restaurants/Cafés	14	12.4	15.5	10.7
Pubs/Bars	1	0.9	1.7	5.1
Hot food takeaways	2	1.8	3.1	6.4
Other non-retail services	29	25.7	25.7	16.3
Vacant	14	12.4	13.9	14.8
Total	**113**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Cobham has the highest proportions for both convenience retail and comparison retail in the Borough. The proportion of comparison retail units is above the national average. The convenience retail offer in Cobham includes a large Waitrose store, which anchors the centre. There is only one financial/professional service unit. The food and beverage offer in Cobham is below the Borough average, but above the UK average for restaurants/cafés. There is a low provision of pubs/bars and hot food takeaways. The provision of other non-retail services in reflects the Borough's average, higher than the national average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables C2 and C3.

Table C2 Mix of comparison goods retail uses – Cobham

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	12	29.3	14.2	20.8
Furniture, carpets and textiles	4	9.8	19.9	7.4
Books, art, cards and stationers	4	9.8	8.1	6.2
Electrical, music and photography	0	0.0	3.8	9.4
DIY, hardware and homeware	2	4.9	9.5	7.1
China, glass and gifts	1	2.4	3.3	5.8
Cars, motorcycles and accessories	0	0.0	1.9	1.3
Chemists, drugstores and opticians	6	14.6	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	1	2.4	2.4	2.1
Toys, hobby, cycle and sports	3	7.3	7.1	5.5
Jewellers	2	4.9	2.8	5.1
Charity and second-hand shops	4	9.8	12.3	10.0
Other comparison goods retailers	2	4.9	1.9	5.7
Total	**41**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Although Cobham has the highest proportion of comparison retail units, it has only the third-highest number of outlets (41), after Walton (56) and Weybridge (49). It has representation in 11 of the 14 Goad Plan comparison shop categories, as shown in Table C2, but the choice of outlets in most categories is limited.

Cobham has a reasonable choice of clothing/footwear shops and chemists/drugstores/opticians. There is no representation in the electrical/music/photography; cars/motorcycles/accessories and variety/department/catalogue store categories.

Cobham has a reasonable selection of non-retail services (47 units), as shown in Table C3, but the choice of outlets in some categories is limited e.g. banks/financial services. There is a good representation of restaurants/cafés. Cobham also has an above-average provision of estate agents/valuers (the highest in the Borough) and travel agents. Other non-retail service uses in Cobham include tailors, funeral directors and dog groomers. The centre also has a library, village hall, community centres, a Royal British Legion Clubhouse, Church of the Sacred Heart and a Post Office.

Table C3 Mix of non-retail service uses – Cobham

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	14	31.8	35.6	25.1
Hot food takeaway	2	4.5	7.2	15.1
Public house / bar	1	2.3	3.9	11.9
Bank / other financial service	1	2.3	4.2	7.1
Betting shop / casino / amusement	1	2.3	1.6	3.6
Estate agent / valuer	7	15.9	11.4	7.3
Travel agent	2	4.5	0.7	1.4
Hairdresser / beauty parlour	14	31.8	31.7	27.1
Launderette / dry cleaner	2	4.5	3.6	1.5
Sub-total	**44**	**100.0**	**100.0**	**100.0**
Other non-retail services	3			
Total	**47**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Table C4 Multiple retailers – Cobham

Comparison	Convenience	Food and Beverage
Boots	Holland & Barrett	Caffe Nero
Cancer Research UK	Majestic Wines	Coppa Club
Fired Earth	Sainsbury's	Costa
John Lewis of Hungerford	Waitrose	Deep Blue
Jojo Maman Bebe		Domino's
Oxfam		Gail's
Robert Dyas		Joe and the Juice
Space NK		Pizza Express
Sweaty Betty		Pret a Manger
		The Ivy
		Young's Pubs

Source: Lichfields' site visit (September 2024).

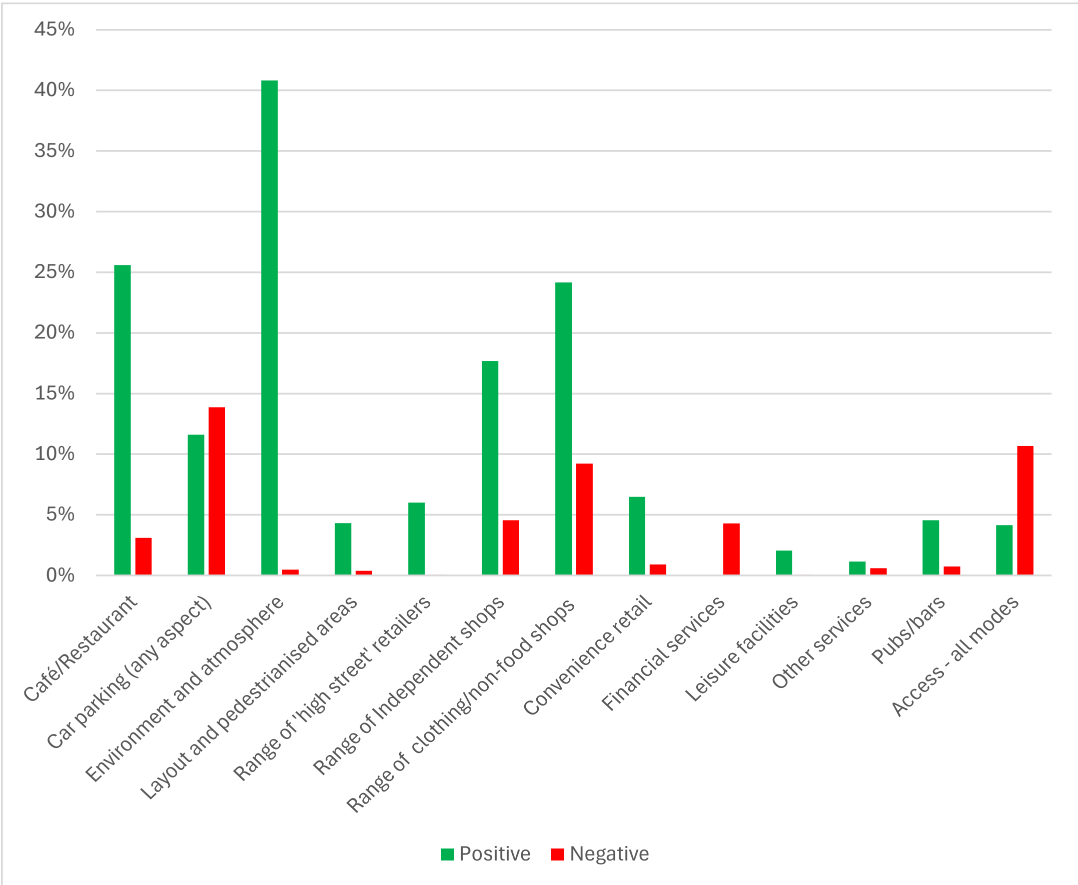
Cobham has a small number of national multiples, commensurate with its size, as shown in Table C4. The retail offer is primarily independent shops. However, there are several high-quality comparison shops and a good choice of food/beverage outlets.

Customer views

Around 35% of respondents in the study area had visited Cobham, slightly more than Esher (31%), and ranked third overall. Of those who had used shops/services in Cobham, respondents were asked what they liked about the centre and what improvements would make them visit more often. These factors are compared in Figure C2 below.

Cobham has the highest levels of satisfaction compared to dissatisfaction when compared with the other assessed centres. There are high levels of satisfaction with cafés/restaurants, the environment/atmosphere and clothing/non-food shops. Views are also more positive than negative for most other aspects.

Figure C2 Positive and negative factors mentioned buy visitors about Cobham (% of all Cobham visitors)



Source: NEMS household survey (August 2024).

Access was viewed negatively, with car parking attracting slightly more negative views than positive. Overall, taking aspects attracting comments for more than 5% of respondents, six attributes were viewed positively, and two negatively, which is the best performance of all assessed centres. After car parking, the most mentioned suggestion was to reduce traffic congestion / improve access by car (9.6%) followed by improving the range of non-food shops

(4.9%). The survey results indicate high levels of satisfaction with the environment and provision of shops, with access and parking suggested for improvements.

In Cobham, the only issues attracting comments from more than 2% of respondents related to car parking, congestion, the range of shops, financial services and cafes/restaurants, indicating relatively high overall levels of satisfaction.

Details of opinions on the environment, accessibility, and car parking are included in the sections below.

Customer activities and catchment area

The Council's 2016 Retail Assessment gave Cobham Town Centre a convenience goods turnover of £33.8m in 2015, and a comparison goods turnover of £41.1m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £39.3m and £37.9m in this Study. This shows a positive uplift in food spending in the centre, whilst the relatively small drop in comparison goods turnover shows the general resilience of Cobham's comparison good offer.

Table C5 Activities carried out by visitors to Cobham (% of all visitors to each centre)

Activity	Cobham	Average for all Centres
Shopping		
Non-food shopping	37.3%	41.1%
Food shopping	38.1%	37.6%
Visit the market	0.7%	1.6%
Window shop/browse	9.2%	9.2%
Click and collect	0.0%	0.7%
Leisure		
Go for a walk	5.8%	5.6%
Café/pub/restaurant	48.2%	37.0%
Leisure activity	3.5%	14.0%
Other services		
Banks/other financial institutions	1.2%	4.9%
Health facilities	6.9%	6.6%
Other services	8.3%	5.9%
Getting petrol	0.0%	0.1%
Post office	3.4%	3.2%
Library	1.8%	2.6%
Other activities		
Travelling to/from work	1.3%	3.3%
Education/school run	0.0%	0.6%
Visting family/friends	10.8%	5.8%

Source: NEMS household survey (August 2024).
* percentages add to more than 100% due to multiple activities.

Of the 35% of study area respondents who had visited shops, services or leisure facilities in Cobham during the last year, most visitors come from the local Cobham/Oxshott area – Zone 6, where it was the most popular destination. Relatively high numbers also came from Zone 1 – Weybridge, where Cobham was the third most popular destination behind Weybridge and Walton. It also ranked third in Zone 9 – Byfleet.

Only 3.2% of survey respondents across the study area indicated that Cobham was their main destination for non-food shopping. Cobham's Waitrose store attracts marginally more respondents for their main food shopping (3.7%), compared with the out-of-centre Sainsbury's store (3.6%). Survey results suggest Waitrose store acts as an anchor for the centre.

The breakdown of activities undertaken by visitors to Cobham is shown and compared with the average for the Borough in Table C5.

Cobham has below-average proportion undertaking non-food shopping. Food shopping is slightly above the Borough average. The main activity undertaken in Cobham is visiting cafés/pubs/restaurants. Low proportions of visitors carry out other leisure activities or visit banks/other financial institutions. There are slightly above average proportions utilising other non-retail services. The number of people visiting friends/family in Cobham is much higher than other centres.

The capacity analysis suggests Cobham has a combined retail and food/beverage turnover of £141 million, relatively evenly split between convenience (27%), comparison (32%) and food/beverage (41%) turnover. This combined turnover is the third highest of all centres in the Borough. The centre attracts 58% of its trade from the local Cobham / Oxshott Zone 6. Cobham attracts most of its trade from the south of the Borough.

Rental Levels

Data from the Valuation Office Agency (VOA) shows that Cobham has some of the highest Prime Zone A retail rental values in the Borough, ranging from £300-£1,000. The highest values of £850 per sq.m. and above are located on the High Street, south of Hollyhedge Road. Anyards Road achieves values of £850 per sq.m., with the parade on its western side ranging between £500-£600 per sq.m. Oakdene Parade has consistent values of £900 per sq.m. and Between Streets ranges between £850-875 per sq.m. Lower values are found on Hollyhedge Road (£600 per sq.m.) and Church Street (£300-£713 per sq.m.). Consistent with other centres in the Borough, there are a mix of unit types and values to enable a range of businesses to occupy space.

Accessibility

Cobham and Stoke D'Abernon Railway Station is located just under 2.5km south, which is 10 minutes by bus (C1, 408). Buses along this route run every 15 minutes to an hour throughout the day. Train services connect to Guildford and London Waterloo, with stops at Oxshott, Surbiton and Wimbledon.

There are four bus stops in Cobham centre – two at the High Street adjacent to Sainsbury's Local, one outside Waitrose and one by the Community Centre on Oakdene Road. Bus stops have shelters in good condition and the stops on the High Street are equipped with digital signage. Services link to Oxshott (C1, C2, 408, 513, 621, 862); Weybridge (C1, C2); Leatherhead (C1, 408); Guildford (715); Banstead (408); Epsom (408); Esher (513, 715); Thames Ditton (513, 715); and Kingston (513, 715). C1 and C2 are Chatterbus (community-run) buses, with the C3 facilitating a connection to the train station.

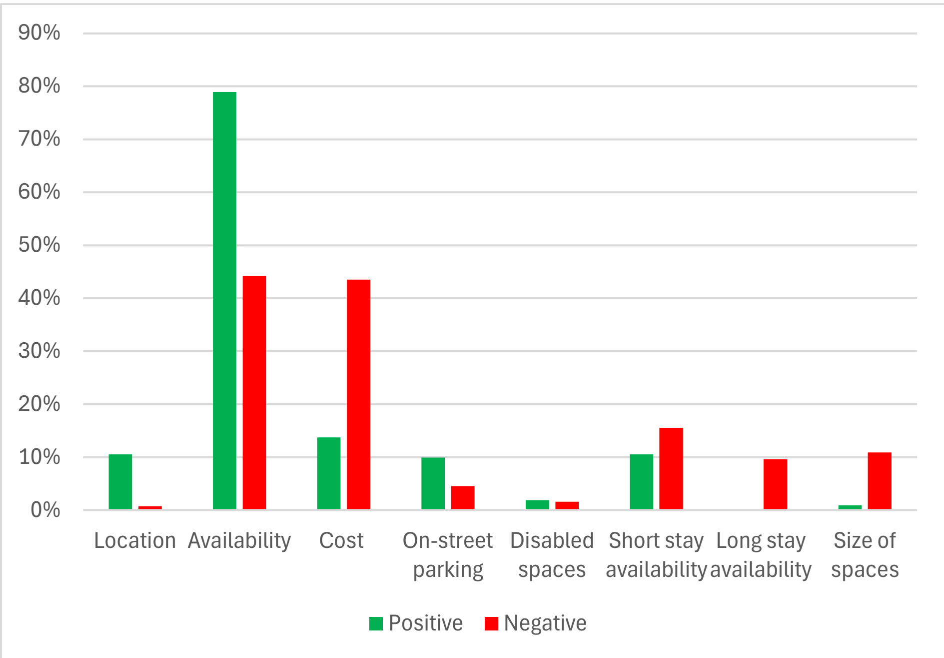
Customer parking is available at Waitrose, with a two-storey car park. On-street parking is available at Oakdene Parade. There are two Council car parks, with the number of spaces and charge regime set out below in Table C6.

Table C6 Car parks – Cobham

Car Park	No. of Spaces	Charge Regime
Hollyhedge Road	192 + 6 disabled bays	Monday-Sunday: 1 hour - £1.80 2 hours - £3.50 3 hours - £5.20 4 hours - £6.50 5 hours - £8 Up to 9 hours - £8.70 Over 9 hours - £11.80 Applicable Monday-Saturday 8am-7pm and Sunday 10am-5pm.
Cedar Road	15	As above (council-run).

Source: Elmbridge.gov.uk

Figure C3 Positive and negative factors mentioned by visitors about car parking in Cobham (% of those who said 'car parking' as a positive/negative factor)



Source: NEMS household survey (August 2024).

Traffic flows are reasonably high and consistent through the centre and the number of pedestrian crossings could be improved in the High Street. Pavements are wide and in good condition. Higher pedestrian flows were observed at Oakdene Parade, which forms a sheltered pedestrian environment. Hollyhedge Road provides good access from the major car park through to the High Street.Accessibility was a key aspect viewed negatively by survey respondents, mainly due to negative views on accessibility by car, 9.7% suggested improvements were required, in particular due to congestion in the centre. Low proportions of respondents suggested other improvements to accessibility are required e.g. bus or train services.

In terms of pedestrian accessibility, 3.6% commented positively on the layout of the centre. Few respondents suggested increasing pedestrianised areas. There are general levels of satisfaction with pedestrian accessibility in Cobham.

Survey respondents' views on car parking in Cobham are shown below in Figure C3. Views on car parking in Cobham were mixed. Whilst 13.9% suggested improvements were required, 11.5% reported satisfaction. Cobham has the lowest levels of dissatisfaction with car parking of the assessed centres. Factors liked and disliked are broken down overleaf.

More respondents commented positively on the availability of car parking, but the cost of parking is viewed negatively, including 29% suggesting parking is made cheaper and 14.5% suggesting it is made free. Fewer respondents suggested increasing the availability of on-street parking. The survey results suggest that the size of spaces is an issue for some respondents. There were no other suggestions for improvements to the design or maintenance of car parks.

As in other centres, accessibility in Cobham is viewed more negatively than positively, but there are lower proportions of survey respondents indicating dissatisfaction than other centres. Congestion, traffic and the cost of car parking are the most significant issues.

Environment and ambience

Cobham is an attractive and well-maintained centre with pleasant landscaping and interesting features, such as the clock tower. There are few noticeable shop vacancies, except for at the southern end of the High Street. The part pedestrianisation of Hollyhedge Road forms a pleasant square, with benches and outside café seating adding to the centre's vibrancy. There could be an opportunity utilise this area for temporary uses. Access to Leg O'Mutton field – the nearby playing fields – could be improved through the addition of a crossing at Downside Bridge Road.

Traffic through the rest of the centre is consistent, but travels at relatively low speeds. The arrangement of Oakdene Parade as a one-way street offers convenient parking spaces and direct access to shops, with the central reservation separating Anyards Road integrating landscaping.

The environment and atmosphere were viewed positively by respondents. Factors liked are as follows: attractive environment / nice place (18.1%), nice atmosphere / friendly people (11.4%), open/green spaces (4.2%), quiet/not too busy (2.8%), clean/well-maintained streets (1.7%), traditional/quaint (1.6%), and vibrant/busy (1.0%). Few suggested improvements to the environment were suggested.

Occurrence of Crime

Cobham has the second highest crime rate in Elmbridge, at 81 crimes per 1,000 people (crimerate.uk, 2024). This is above the average for Surrey (62 per 1,000) but below Walton (109 per 1,000). It is significantly higher than Weybridge's rate of 65 per 1,000 people.

In Cobham 11 crimes were reported in July 2024 (Police.uk). There were minor hotspots at Waitrose and on the High Street. There was a similar distribution in June 2024 with 13 crimes reported and in May a spike to 24 crimes, including six counts of shoplifting reported at Waitrose. Crime and safety were not raised by survey respondents, suggesting this is not a major issue in Cobham.

SWOT Analysis

Cobham's Strengths

- An attractive and high-quality environment and public realm.
- High levels of visitor satisfaction, particularly with cafés/restaurants, the environment, and the range of independent shops.
- A good range of shops and services for a centre of its size.
- Waitrose performs as an anchor store for the centre.
- Relatively high rental values indicating a strong commercial property market.

Cobham's Weaknesses

- Limited number of banks, financial/professional services.
- Limited number of national multiple retailers.
- Higher levels of dissatisfaction with the provision of clothing/footwear shops.
- The rail station is located away from the centre with limited bus connections.
- Traffic and limited pedestrian crossings.

Cobham's Opportunities

- Use of spaces for more temporary uses and events.
- Improving access to Leg O'Mutton field and crossings throughout the centre could attract more visitors.
- Improving bus access to the train station could increase visitor numbers and improve sustainable connections to the centre.

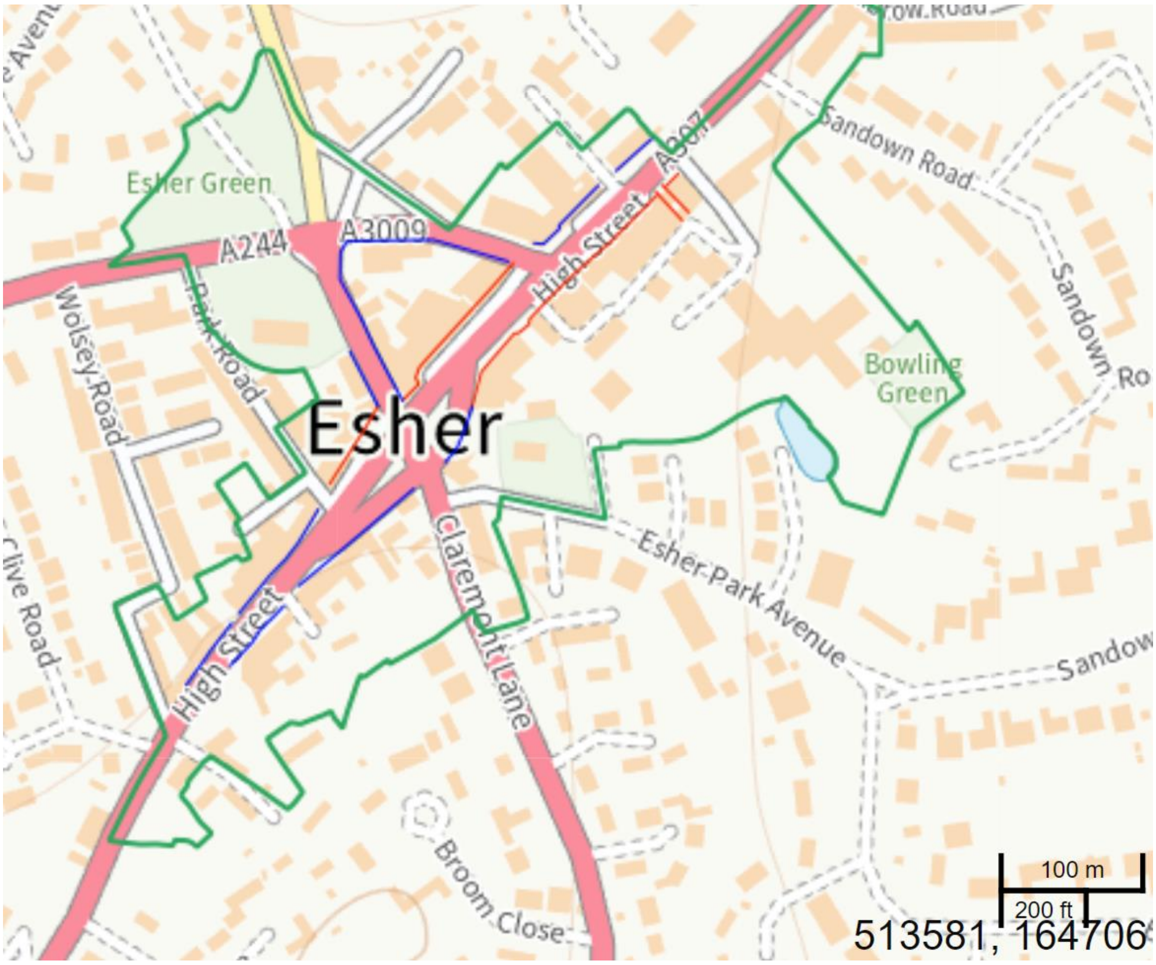
Cobham's Threats

- High rental values may prevent investment and increase vacancies.

ESHER

Esher is currently a designated 'District Centre' with proposals to upgrade it to 'Town Centre' status. It is located in the east of the Borough, approximately 4km south-east of Walton-on-Thames. The centre is defined by the green line in Figure ES1 below.

Figure ES1 Centre boundary and shopping frontages – Esher



Source: Elmbridge Core Strategy 2011-2026.

Esher is focused at the crossroads of High Street and Church Street / Claremont Lane. Most of the southern half of the centre is a Conservation Area. The Primary Shopping Frontage (red line) encompasses the majority of High Street, from Sandown Road to Park Road, and covers King George's Walk, a small arcade. Making up Secondary Shopping Frontage (blue line) is the southwestern section of High Street and parts of the north side of the northeastern section of High Street, as well as segments of Church Street and Esher Green (the street). Esher Green (the park) provides green space for the centre on its northern edge.

Mix of Uses and Vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

Esher has 112 retail and service units, the fourth highest of the six centres in Elmbridge. The mix of uses is set out in Table ES1, which is compared to the Borough and UK averages. There were 22 vacant units in September 2024, a vacancy rate of 19.6%, which is the highest rate in the Borough. Esher's vacancy rate was significantly higher than the Borough and UK averages, which suggests the supply of shop premises surpasses operator demand at the time. This has since fallen to 13.6% in January 2025 with a number of units undergoing renovations at the time (and so marked as vacant in accordance with standard practice) or have since been reoccupied.

The September 2024 vacant units are spread along the High Street, with a prominent cluster at the southern end, but a row of units in this location were undergoing alterations/renovations. There is another smaller cluster at Church Street. The vacancy rate during the Elmbridge Retail Assessment 2016 was much lower at 9.3%, and below the national average (11.4%) at the time, which suggests the centre has not fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table ES1 Mix of retail and service uses – Esher

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	3	2.7	6.0	9.8
Comparison retail	27	24.1	29.9	28.4
Financial/Professional	9	8.0	4.3	8.5
Restaurants/Cafés	18	16.1	15.5	10.7
Pubs/Bars	2	1.8	1.7	5.1
Hot food takeaways	2	1.8	3.1	6.4
Other non-retail services	29	25.9	25.7	16.3
Vacant	22	19.6	13.9	14.8
Total	**112**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

The composition mix of uses in Esher varies from the Borough and UK averages. There are only three convenience goods outlets and a low proportion of comparison retail, pubs/bars, hot food takeaways. The food and beverage offer in Esher generally conforms with the Borough's averages, with a higher proportion of restaurants/cafés. Esher's other non-retail services provision is similar to the Borough average, which is well above the national average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables ES2 and ES3.

Esher has 27 comparison retail units, the fourth-highest number in the Borough, but it has the lowest proportion of comparison retail units. As shown in Table ES2, it has representation in only 9 of the 14 Goad Plan comparison shop categories. There is a limited choice of comparison retailers in all categories, apart from in furniture/carpets/textiles. Esher has no outlets in the following categories: clothing/footwear shops, electrical/music/ photography; cars/motorcycles/accessories; variety/department/catalogue and other comparison goods retailers.

For its size, Esher has a good selection of non-retail services (60 units), as shown in Table ES3. As with the other centres in the Borough, there is a strong representation of restaurant/cafés, but lower representations of pubs/bars and hot food takeaways. When compared to the national average, Esher also has an above-average provision of estate agents/valuers and hairdressers/ beauty parlours.

Esher has no banks or building societies. Other non-retail service uses in Esher include accountants, a gym/fitness studio, interior designers, funeral directors, a photo framing and watch repair shop. The centre has a Surrey Police Station, library, Esher Theatre, a cinema, places of worship, educational and health facilities.

Table ES2 Mix of comparison goods retail uses – Esher

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	0	0.0	14.2	20.8
Furniture, carpets and textiles	12	44.4	19.9	7.4
Books, art, cards and stationers	1	3.7	8.1	6.2
Electrical, music and photography	0	0.0	3.8	9.4
DIY, hardware and homeware	3	11.1	9.5	7.1
China, glass and gifts	1	3.7	3.3	5.8
Cars, motorcycles and accessories	0	0.0	1.9	1.3
Chemists, drugstores and opticians	4	14.8	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	1	3.7	2.4	2.1
Toys, hobby, cycle and sports	1	3.7	7.1	5.5
Jewellers	1	3.7	2.8	5.1
Charity and second-hand shops	3	11.1	12.3	10.0
Other comparison goods retailers	0	0.0	1.9	5.7
Total	**27**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Table ES3 Mix of non-retail service uses – Esher

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	18	37.5	35.6	25.1
Hot food takeaway	2	4.2	7.2	15.1
Public house / bar	2	4.2	3.9	11.9
Bank / other financial service	2	4.2	4.2	7.1
Betting shop / casino / amusement	1	2.1	1.6	3.6
Estate agent / valuer	7	14.6	11.4	7.3
Travel agent	0	0.0	0.7	1.4
Hairdresser / beauty parlour	15	31.3	31.7	27.1
Launderette / dry cleaner	1	2.1	3.6	1.5
Sub-total	**48**	**100.0**	**100.0**	**100.0**
Other non-retail services	12			
Total	**60**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

The national multiple retailer and food/beverage outlets are shown in Table ES4. Esher has a limited selection of retail multiples, but there is a reasonable food and beverage offer.

Table ES4 Multiple retailers – Esher

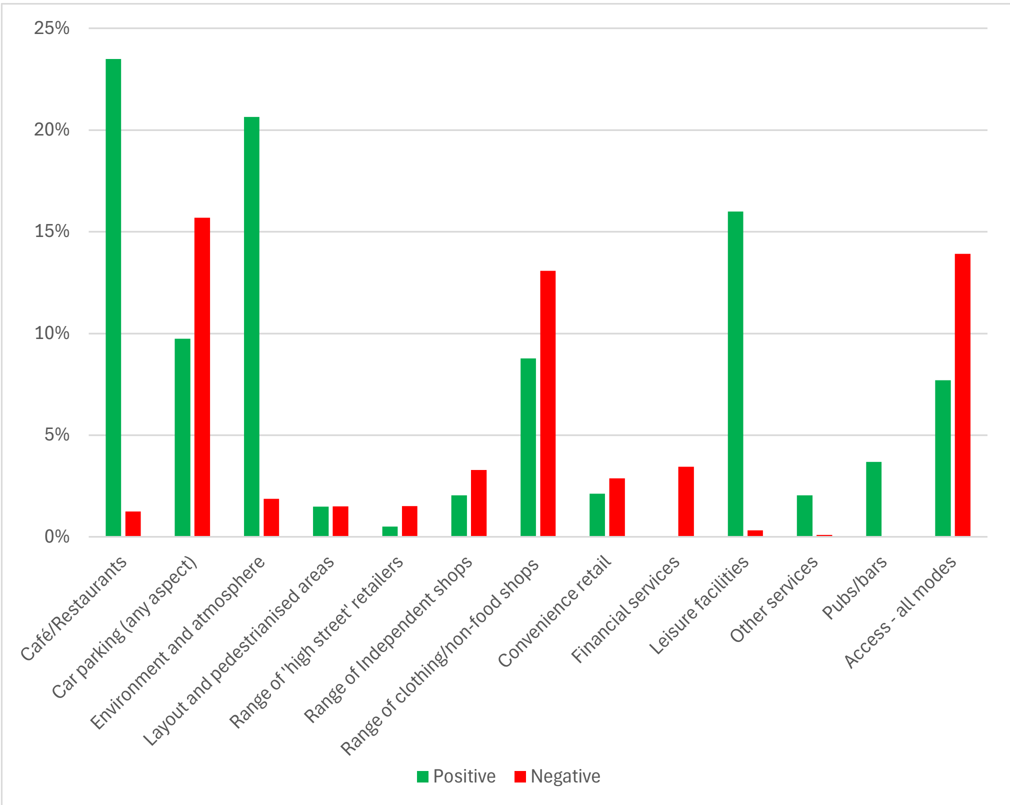
Comparison	Convenience	Food and Beverage
Age UK	Morrison's Daily	Caffe Nero
Boots	Tesco Express	Cote Brasserie
Farrow and Ball	Waitrose	Esquire's Coffee
Magnet Kitchens		Fuller's Inns
Oxfam		Gail's
		Giggling Squid
		Pizza Express
		Subway
		Young's Pubs

Source: Lichfields' site visit (September 2024).

Customer Views

Around 31% of respondents in the study area had visited Esher in the past year. Of those who had used shops/services in Esher, respondents were asked what they liked about the centre and what improvements would make them visit more often. These factors are compared in Figure ES2 below.

Figure ES2 - Positive and negative factors mentioned by visitors about Esher (% of all Esher visitors)



Source: NEMS household survey (August 2024).

The survey results indicate mixed opinions on Esher, with marginally higher levels of satisfaction overall. Cafés and restaurants, the environment and atmosphere, and leisure facilities were three aspects that attracted particularly high levels of satisfaction compared to dissatisfaction. The range of clothing and non-food shops generally, car parking and access by all modes attracted more negative views overall, although there were reasonable numbers of positive comments. Pubs and bars and other services were viewed positively, while there were negative views about financial services. Other aspects attracted lower numbers of comments and indicated mixed opinions. Despite the high shop vacancy rate in Esher, this issue was not raised a particular concern in Esher.

In terms of suggested improvements, car parking was the most significant issue, with 15.7% commenting negatively, although 9.6% viewed this positively. The next most popular suggestion was to reduce traffic congestion / improve access by car (11.3%), followed by improving the range of non-food shops (9.0%).

Overall, taking aspects attracting comments of more than 5% of respondents, three attributes were viewed positively, and three negatively, indicating the mixed nature of opinions. The results indicate satisfaction with the provision of cafés/restaurants, pubs/bars and leisure in Esher, but services and the range of shops had higher levels of dissatisfaction. Details of opinions on the environment, accessibility and car parking are included below.

Customer activities and catchment area

The Council's 2016 Retail Assessment gave Esher Town Centre a convenience goods turnover of £29.6m in 2015, and a comparison goods turnover of £9.0m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £32.3m and £5.7m in this Study. This shows a positive uplift in food spending in the centre, whilst comparison goods spending has fallen, in line with existing national trends and reflecting the wider impacts of the Covid-19 pandemic and the cost-of-living crisis.

Of the 31% of study area respondents who had visited shops, services or leisure facilities in Esher during the last year, most visitors came from Zone 4 – Claygate, where it was the most popular destination. Other significant visitor sources were Zone 3 – Molesey/Thames Ditton, Zone 5 – Esher/Hersham and Zone 6 – Cobham/Oxshott. Esher was the fourth most popular destination in the Borough.

Only 0.7% of households in the study area do most of their non-food shopping in Esher. This is the same as for Hersham, ranking only above East Molesey (0.1%). Around 3.3% of households in the study area do their main grocery shop at the Waitrose store in the centre.

The breakdown of activities undertaken by visitors to Esher is shown and compared with the average for the Borough in Table ES5.

Esher has low proportions of visitors undertaking retail activities, with below average figures for non-food shopping, food shopping, and window shopping. The proportions undertaking leisure activities and visiting cafes/pubs/restaurants is above average. Low proportions visit banks/financial institutions, but utilisation of other non-retail services is similar to the Borough average.

The capacity analysis suggests Esher has a combined retail and food/beverage turnover of £89 million, which is predominantly food/beverage (56%) and convenience (37%) turnover. This combined turnover is the fourth highest of all centres in the Borough. The centre attracts 76% of its trade from Zone 4 – Claygate and Zone 5 – Esher/Hersham. Esher attracts nearly all its trade from the northeast of the Borough.

Table ES5 Activities carried out by visitors to Esher (% of all visitors to each centre)

Activity	Esher	Average for all Centres
Shopping		
Non-food shopping	22.6%	41.1%
Food shopping	24.4%	37.6%
Visit the market	0.0%	1.6%
Window shop/browse	5.0%	9.2%
Click and collect	0.0%	0.7%
Leisure		
Go for a walk	1.7%	5.6%
Café/pub/restaurant	40.7%	37.0%
Leisure activity	36.6%	14.0%
Other services		
Banks/other financial institutions	1.5%	4.9%
Health facilities	3.2%	6.6%
Other services	6.1%	5.9%
Getting petrol	0.1%	0.1%
Post office	3.4%	3.2%
Library	2.2%	2.6%
Other activities		
Travelling to/from work	7.4%	3.3%
Education/school run	1.7%	0.6%
Visting family/friends	3.0%	5.8%

Source: NEMS household survey (August 2024).
* percentages add to more than 100% due to multiple activities.

Rental levels

Data from the Valuation Office Agency (VOA) shows that Esher's Prime Zone A retail rent values range between £300-£600 per sq.m., similar to values in Weybridge, but below Cobham. Values on Church Street range between £375-£400 per sq.m., with the highest values of £600 per sq.m. located at northeastern portions of the High Street. There is some variation in this area with values between £525 to £300 per sq.m.. Values decrease at the southwestern end of the High Street to £400-£450 per sq.m.

Accessibility

Esher Railway Station is located 1.5km north-east of the centre, a 10-minute bus ride (via 515), although the buses run only every 40 minutes. Train routes are mainly on a half-hourly basis to Woking, Guildford, Aldershot and London Waterloo.

Esher has four Council car parks, as shown in Table ES6 below.

Table ES6 Car parks – Esher

Car Park	No. of Spaces	Charge Regime
Civic Centre	157 + 4 disabled bays	Monday-Sunday: 1 hour - £1.80 2 hours - £3.50 3 hours - £5.20 4 hours - £6.50 5 hours - £8 Up to 9 hours - £8.70 Over 9 hours - £11.80 Applicable Monday-Saturday 8am-7pm and Sunday 10am-5pm.
Berguette	46 + 4 disabled bays	Monday-Sunday: 1 hour - £1.90 2 hours - £3.70 3 hours - £5.60 4 hours - £6.90 5 hours - £8.70 Up to 9 hours - £9.70 Daily charge - £12.90 Applicable Monday-Saturday 8am-7pm and Sunday 10am-5pm.
Highwaymans Cottage	68	Monday-Sunday: 1 hour - £1.90 2 hours - £3.70 3 hours - £5.60 4 hours - £6.90 5 hours - £8.70 Up to 9 hours - £9.70 Daily charge - £12.90 Applicable Monday-Saturday 8am-7pm and Sunday 10am-5pm.
Heather Place	29	Monday-Sunday: 1 hour - £1.80 2 hours - £3.50 3 hours - £5.20 4 hours - £6.50 5 hours - £8 Up to 9 hours - £8.70 Over 9 hours - £11.80 Applicable Monday-Saturday 8am-7pm and Sunday 10am-5pm.

Source: Elmbridge.gov.uk

Free customer parking is available at the Waitrose store (109 spaces) for up to 1.5 hours during opening hours. On-street car parking can also be found on either side of High Street.

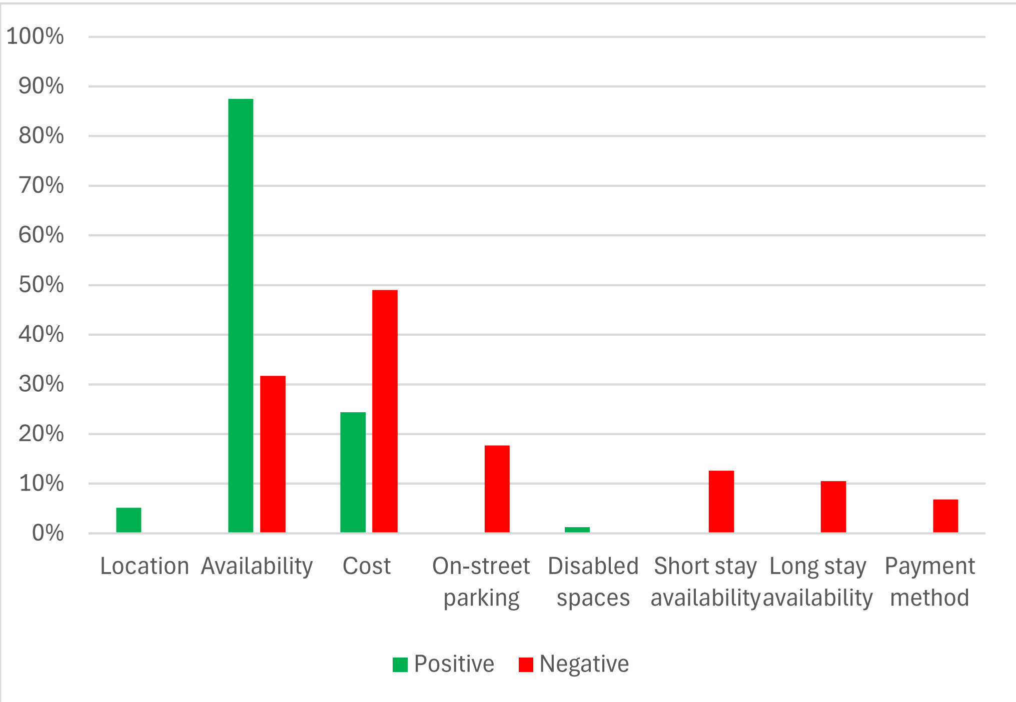
Within the centre, there are six bus stops – three along the High Street, two at Esher Green and one on Church Street. Bus serve routes run to Walton-on-Thames (458, 663); Brooklands (515); Kingston (K3, 458, 513, 514, 515, 715); Guildford (715); Staines (458); Putney Vale (K3) and Downside (513), with stops including Weybridge, Cobham, Hersham, Shepperton, Claygate, Oxshott and Stoke D'Abernon. However, these services run relatively infrequently.

Pedestrian accessibility to and from Esher and pavements are well maintained. During Lichfields' site visit, footfall was highest along the northern portion of High Street, but were relatively light elsewhere. There are adequate pedestrian crossings.

Accessibility was a key aspect viewed negatively by survey respondents, mainly due to negative views on accessibility by car, with 11.3% suggesting improvements were required, relating to congestion in particular. Congestion was the second most suggested improvement. Other accessibility issues raised limited positive or negative comments.

Survey respondents' views on car parking in Esher are shown below in Figure ES3. Views on car parking in Esher were negative overall. Only 9.8% reported satisfaction, with 15.6% suggesting improvements were required. Esher has the lowest levels of satisfaction of the assessed centres, and the second highest dissatisfaction rate. Factors liked and disliked are broken down below.

Figure ES3 Positive and negative factors mentioned by visitors about car parking in Esher (% of those who said 'car parking' as a positive/negative factor)



Source: NEMS household survey (August 2024).

As in other centres, more respondents commented positively on the availability of car parking spaces. However, on-street parking availability, and the availability of long and short stay spaces all attracted negative views. The cost of parking was viewed negatively, including 31.1% suggesting parking is made cheaper and 17.9% suggesting it is made free. However, 19.8% reported positively that car parking was free (presumably at Waitrose). Other suggestions were limited but included improvements to parking payment methods, access in/out, security and safety, parking meter functionality and signposting.

Environment and ambience

Esher has a positive pedestrian environment with landscaping and planters. Pavements are generally good quality, wide and well maintained. Despite the high shop vacancy rate, Esher appears busy. The High Street is bustling, especially the northern section. The southern section of High Street is characterised by an abundance of home interiors design showrooms, including the row of vacant units (under refurbishment). The central green space, at the High Street, Church Street, Claremont Lane crossroads, is reasonably well-maintained, with large trees, seating, bins, as well as some small historical features. The road leading up to Esher Green is open with wide paving.

There are higher levels of dissatisfaction with congestion in the centre (11.3% suggesting improvements are required), traffic flow through the centre are consistent but relatively and low speed.

The environment and atmosphere were viewed positively by survey respondents, with low numbers suggesting improvements were needed. Factors liked are as follows: attractive environment / nice place (10.2%), nice atmosphere / friendly people (4.7%), quiet/not too busy (2.7%), clean/well-maintained streets (1.2%), traditional/quaint (1.2%) and open/green spaces (0.6%). All suggested improvements attracted low numbers of comments. The only aspects connected to the environment to attract significant levels of comments were relating to congestion (11.3%) and increasing pedestrianised areas (1.5%). The number of respondents suggesting an increase of pedestrianised areas is low.

Overall, the survey results indicate high levels of satisfaction with the environment.

Occurrence of crime

Esher has the lowest crime rate of Elmbridge's centres, at 62 per 1,000 people, in line the Surrey average, and similar to Weybridge (65 per 1,000 people).

In July 2024, six crimes were reported within Esher (Police.uk). These were evenly distributed throughout the centre. In June, the number of crimes was higher, with 19 reported to include hotspots at Church Street, Waitrose car park and Warren Close. In May, 10 crimes were reported.

Crime only attracted a small number of comments in the customer survey, which suggests this is not regarded as a significant issue in Esher.

SWOT Analysis

Esher's Strengths

- A strong commercial leisure offer with high levels of customer satisfaction.
- A pleasant shopping environment.
- Healthy shop rental values with a range of premises available.
- A low level of crime.

Esher's Weaknesses

- A high shop vacancy rate.
- A below-average comparison and convenience goods retail offer.
- The train station is not within easy walking distance.
- Car parking attracted low levels of satisfaction in relation to charges.

Esher's Opportunities

- Improving connections to the rail station could increase visitor numbers and promote sustainable access.
- The existing vacancy rate presents an opportunity for the expansion of Esher's shops and service, to accommodate future growth.

Esher's Threats

- Congestion could deter visitors.
- The high shop vacancy rate could deter future investment.

EAST MOLESEY

East Molesey is a designated 'District Centre' at the north-eastern border of the Borough. The centre is defined by the green line in Figure EM1 below. East Molesey is linear in form, stretching approximately 500 metres along Walton Road. The designated Primary (red line) and Secondary (blue line) Shopping Frontages are also shown below.

Figure EM1 Centre boundary and shopping frontages – East Molesey

Source: Elmbridge Core Strategy 2011-2026.

Mix of Uses and Vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

East Molesey has 87 retail and service units, the second lowest number in Elmbridge. The mix of uses is set out in Table EM1, which is compared to the Borough and UK averages. There were seven vacant units in September 2024, a vacancy rate of 8.0%, which is the lowest rate in the Borough and around half of the Borough and UK averages. This suggests good levels of operator demand in relation to the supply of shop premises. In the Elmbridge Retail Assessment 2016, the vacancy rate was 4.0%, significantly and below the national average (11.4%) at the time. The vacancy rate has increase during the Covid and cost of living crisis, but remains below average.

The composition mix of uses in East Molesey is similar to the Borough average, with some notable differences from the UK average. The proportion of convenience retail and comparison retail is in line with the Borough's averages. In relation to the UK averages, East Molesey has a low proportion of financial/professional services and pubs/bars. The food and beverage offer in East Molesey is lower than the Borough average in terms of restaurants/cafés and pubs/bars, but much higher for hot food takeaways. East Molesey also has the highest proportion of other non-retail services in the Borough, double the national average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables EM2 and EM3

Table EM1 Mix of retail and service uses – East Molesey

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	6	6.9	6.0	9.8
Comparison retail	25	28.7	29.9	28.4
Financial/Professional	4	4.6	4.3	8.5
Restaurants/Cafés	10	11.5	15.5	10.7
Pubs/Bars	1	1.1	1.7	5.1
Hot food takeaways	6	6.9	3.1	6.4
Other non-retail services	28	32.2	25.7	16.3
Vacant	7	8.0	13.9	14.8
Total	**87**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

East Molesey has 25 comparison retail units with representation in 10 of the 14 Goad Plan comparison shop categories, as shown in Table ES2, but there is limited choice in all categories except for DIY/hardware/homeware outlets and cars/motorcycles/accessories outlets. There are no china/glass/gifts; variety/department/catalogue, jewellers and other comparison goods shops.

Table EM2 Mix of comparison goods retail uses – East Molesey

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	1	4.0	14.2	20.8
Furniture, carpets and textiles	2	8.0	19.9	7.4
Books, art, cards and stationers	1	4.0	8.1	6.2
Electrical, music and photography	1	4.0	3.8	9.4
DIY, hardware and homeware	6	24.0	9.5	7.1
China, glass and gifts	0	0.0	3.3	5.8
Cars, motorcycles and accessories	4	16.0	1.9	1.3
Chemists, drugstores and opticians	2	8.0	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	2	8.0	2.4	2.1
Toys, hobby, cycle and sports	3	12.0	7.1	5.5
Jewellers	0	0.0	2.8	5.1
Charity and second-hand shops	3	12.0	12.3	10.0
Other comparison goods retailers	0	0.0	1.9	5.7
Total	**25**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

East Molesey's selection of non-retail services is good for a centre of its size (49 units), but there are no travel agents or betting shops/casinos/amusement centres, as shown in Table EM3. As indicated above, the centre has the lowest provision of restaurants/cafés and the highest levels of hot food takeaways in the Borough, although both are in line with the national averages. When compared to the national picture, East Molesey also has an above-average provision of estate agents/valuers, launderettes/dry cleaners and hairdressers/beauty parlours (highest in the Borough). In terms of financial services, East Molesey has no banks or building societies, and only a financial advisors' office. Other non-retail service uses in East Molesey include funeral directors, a dog groomers and a computer repair shop. Community uses include the Royal British Legion clubhouse, Refresh Centre Community Church, Molesey Islamic Cultural Centre, post office, creative workshops/studios, educational and health facilities.

Table EM3 Mix of non-retail service uses – East Molesey

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	10	23.8	35.6	25.1
Hot food takeaway	6	14.3	7.2	15.1
Public house / bar	1	2.4	3.9	11.9
Bank / other financial service	1	2.4	4.2	7.1
Betting shop / casino / amusement	0	0.0	1.6	3.6
Estate agent / valuer	5	11.9	11.4	7.3
Travel agent	0	0.0	0.7	1.4
Hairdresser / beauty parlour	16	38.1	31.7	27.1
Launderette / dry cleaner	3	7.1	3.6	1.5
Sub-total	**42**	**100.0**	**100.0**	**100.0**
Other non-retail services	7			
Total	**49**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

East Molesey has a limited number of national multiples and primarily has small independent shops. The national multiple retailer and food/beverage outlets available are shown in Table EM4.

Table EM4 Multiple retailers – East Molesey

Comparison	Convenience	Food and Beverage
Dulux Euronics Fara	Poundland Premier Express Tesco Metro	Subway

Source: Lichfields' site visit (September 2024).

Customer activities and catchment area

The Council's 2016 Retail Assessment gave East Molesey Town Centre a convenience goods turnover of £15.4m in 2015, and a comparison goods turnover of £15.8m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £11.0m and £7.9m in this Study. This drop-off in convenience goods spending indicates the continued success of out-of-centre stores, whilst comparison goods spending has fallen in line with existing national trends and reflecting the wider impacts of the Covid-19 pandemic and the cost-of-living crisis.

Around 17% of respondents in the study area had visited shops, services or leisure facilities in East Molesey during the last year. The majority of visitors came from Zone 3 – Molesey/Thames Ditton, where Walton was only marginally more popular. Very low numbers came from Zones 7-9 outside of the Borough, and Zones 2 – Walton and 4 – Claygate were the only other significant visitor sources.

Only 0.1% of households in the study area do most of their non-food shopping in East Molesey, which suggests the centre is not a significant shopping destination. This was the lowest figure for the main centres assessed in the Borough. Survey results suggest Tesco at Hurst Park attracted a high proportion of visitors for main food shopping (5.6%), with the Tesco on Walton Road attracting only 1.5%.

The capacity analysis suggests East Molesey has a combined retail and food/beverage turnover of only £26 million, relatively evenly split between convenience (42%), comparison (31%) and food/beverage (27%) turnover. This combined turnover is the lowest of the six main centres in the Borough. The centre attracts 67% of its trade from the local Molesey / Thames Ditton Zone 3. East Molesey attracts nearly all its trade from the north of the Borough.

Rental Levels

Data from the Valuation Office Agency (VOA) shows that prime retail rental values in East Molesey range between £200 and £300 per sq.m. Higher values are generally found on the southern side of Walton Road.

Accessibility

East Molesey does not have a railway station. Hampton Court Railway Station is located approximately 700 metres north-east, which is a 10-minute walk or a 3-minute bus journey (via 411) running every 20 minutes. South Western Railway trains run to London Waterloo. The station is part of a redevelopment area for residential and retail units, as well as a hotel and new transport interchange, allowed at appeal in July 2022.

There are three bus stops within the centre long Walton Road. Bus routes link the centre to West Molesey (411); Brooklands (514); Thames Ditton (881) and Kingston (411).

There is good pedestrian accessibility within the centre, with the wide paving on Walton Road. However, there are a limited number of crossing points. Routes connecting the centre to the East Molesey Bridge Road and Hampton Court station through residential areas could be improved, with better signage and pavement upgrades. Pedestrian flows are relatively light compared with other centres in the Borough.

East Molesey has one public car park, detailed in Table EM5. There is also on-street parking available.

Table EM5 Car Parks – East Molesey

Car Park	No. of Spaces	Charge Regime
Walton Road	138 + 3 disabled bays	Monday-Friday: 1 hour - £1.10 2 hours - £2.20 3 hours - £3.30 4 hours - £4.50 Over 4 hours (daily charge) - £5 Saturday: 1 hour - free 2 hour - £1.10 3 hour - £2.20 4 hour - £3.30 Over 4 hours (daily charge) - £5 Applicable Monday to Saturday 9am-6pm. Charges do not apply on Sundays, bank holidays or public holidays.

Source: Elmbridge.gov.uk

Environment and ambience

As a linear centre, East Molesey lacks a central focus point for meeting and gathering. The western side of the centre has wide pavements with tree planters, seating, bins and bicycle stands, bollards and bins. A noticeboard near the Tesco store advertises local events, activities and services. The eastern side of the centre have less attractive street frontages and narrower pavements. The buildings in this area are generally less attractive. There are no obvious clusters of vacant shop units in the centre. Traffic flow and speeds are relatively low. The environment is generally for pedestrians friendly.

Occurrence of Crime

An overall crime rate for East Molesey is not available, but the number crimes reported within its centre is available. In July 2024, 12 crimes were reported within East Molesey (Police.uk). This included a concentration at Walton Road/Kent Road, with a high proportion being shoplifting offences (6 out of 10 crimes in this area). In June, 15 crimes were reported in East Molesey with a similar distribution, including 10 counts of shoplifting at the same location. Few crimes were reported in May (3) and April (0).

SWOT Analysis

East Molesey's Strengths

- A low shop vacancy rate
- A good range of non-retail services for a centre of its size.
- Small independent outlets.
- A pedestrian friendly environment, with wide pavements and relatively low traffic flows.

East Molesey's Weaknesses

- A relatively low provision of restaurants/cafés and pubs/bar to support the evening economy.
- A limited number of national multiple.
- The quality of the environment could be improved in the eastern part of the centre.

East Molesey's Opportunities

- Public realm improvements could increase the attraction of the centre.
- The evening economy is relatively undeveloped and could be expanded.

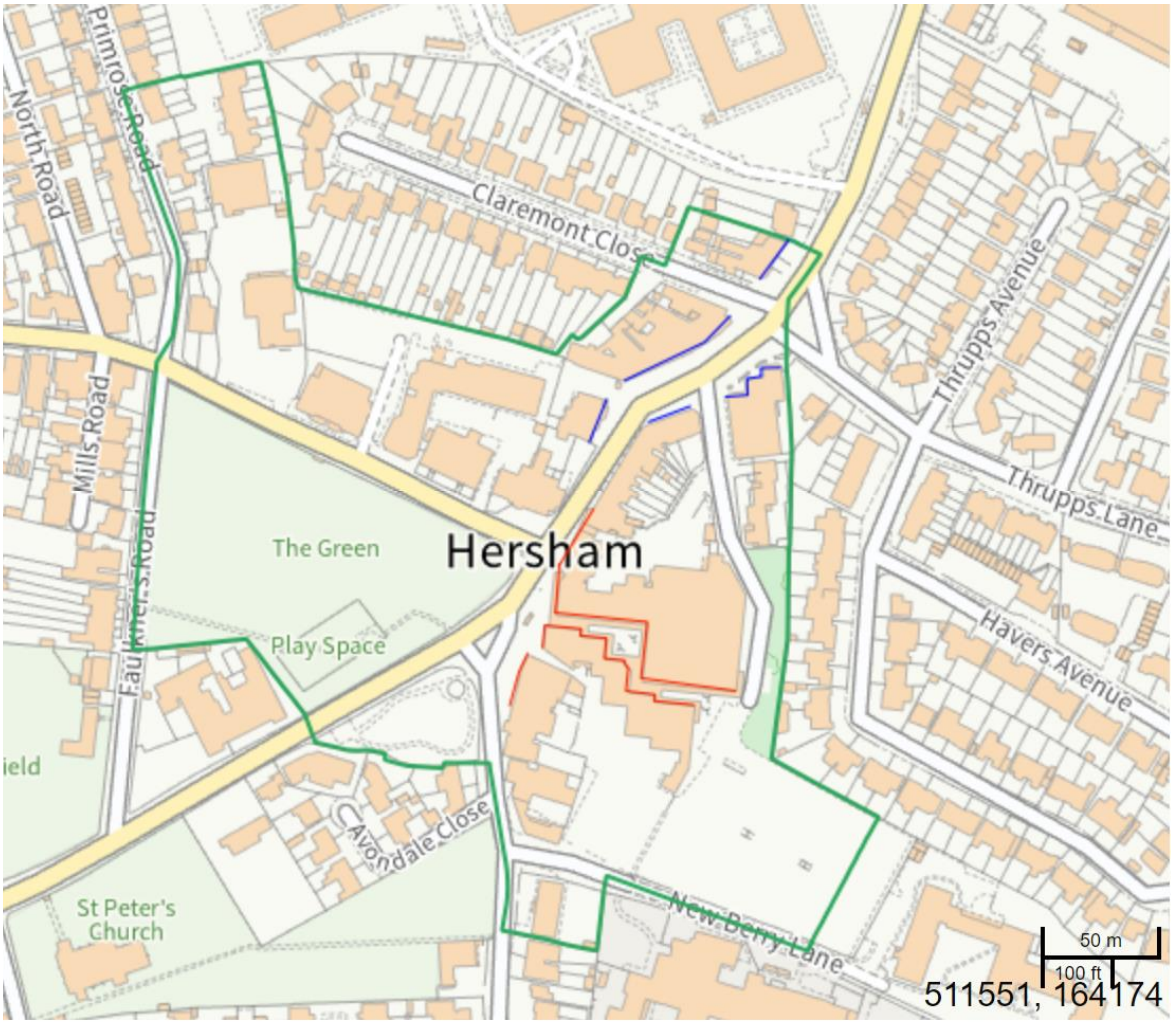
East Molesey's Threats

- There are a limited number of shop vacancies which could restrict opportunities to accommodate growth and investment.
- A further increase in crime could harm the vitality of the centre.

HERSHAM

Hersham is the smallest designated District Centre, centrally located in the Borough, just 2.5km south of Walton-on-Thames. The centre is defined by the green line in Figure H1 below. The Primary and Secondary Shopping Frontages are shown in red and blue lines, respectively.

Figure H1 Centre boundary and shopping frontages - Hersham



Source: Elmbridge Core Strategy 2011-2026.

The centre is focused around a T-junction, with Queens Road perpendicular to the main streets of Molesey Road / Burwood Road. The Primary Shopping Frontage consists of the Hersham Green Shopping Centre, which is anchored by a Waitrose supermarket, and parts of Molesey Road / Burwood Road. The Secondary Shopping Frontage is staggered from the Primary Frontage and covers the northern section of Molesey Road. A Lidl store is located 140 metres north of the centre. In addition to Hersham Green and Hersham Memorial Garden, further green spaces can be found close by at Vauxmead and Back Green. Towards the north is Hersham Place Technology Park, which is a significant area of office business space.

Mix of uses and vacancies

The following analysis excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

Hersham has 41 retail and service units, which is the smallest number of the six centres in Elmbridge. The mix of uses is set out in Table H1, which is compared to the Borough and UK averages. There were five vacant units in September 2024, a vacancy rate of 12.2%, which is the second lowest rate in the Borough and below the UK averages. This suggests the supply of shop premises is broadly in line with operator demand. The Elmbridge Retail Assessment 2016 did not contain information about Hersham but suggested *"very few units within the centre were vacant, including one vacant unit within Hersham Green Shopping Centre"*; which implies the vacancy rate was below the national average (11.4%) at the time.

Table H1 Mix of retail and service uses – Hersham

Type	Number of units	% units	% units Borough average	% units UK average
Convenience retail	1	2.4	6.0	9.8
Comparison retail	13	31.7	29.9	28.4
Financial/Professional	1	2.4	4.3	8.5
Restaurants/Cafés	6	14.6	15.5	10.7
Pubs/Bars	1	2.4	1.7	5.1
Hot food takeaways	2	4.9	3.1	6.4
Other non-retail services	12	29.3	25.7	16.3
Vacant	5	12.2	13.9	14.8
Total	**41**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

The composition mix of uses in Hersham is broadly similar to the Borough average. The centre's proportion of comparison retail units is amongst the highest in the Borough and slightly above the national average, but the proportion of convenience retail units is the lowest in the Borough, with only one outlet. The number of financial/professional services is also low. The food and beverage offer in Hersham is similar to the Borough's averages, with a higher proportion of restaurants/cafés and low proportions of pubs/bars and hot food takeaways when compared with the UK averages. Hersham has the second highest proportion of other non-retail services in the Borough, nearly double the national average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables H2 and H3.

Hersham has the lowest number of comparison retail outlets (13 units) in the Borough, but this is linked to its overall size. It has representation in only 6 of the 14 Goad Plan comparison shop categories, as shown in Table H2, and the choice in each category is limited, except for furniture /carpets/textiles outlet.

Table H2 Mix of comparison goods retail uses – Hersham

Type	Number of units	% units	% units Borough average	% units UK average
Clothing and footwear	2	15.4	14.2	20.8
Furniture, carpets and textiles	5	38.5	19.9	7.4
Books, art, cards and stationers	0	0.0	8.1	6.2
Electrical, music and photography	0	0.0	3.8	9.4
DIY, hardware and homeware	0	0.0	9.5	7.1
China, glass and gifts	1	7.7	3.3	5.8
Cars, motorcycles and accessories	0	0.0	1.9	1.3
Chemists, drugstores and opticians	3	23.1	12.8	12.1
Variety, department and catalogue	0	0.0	0.0	1.4
Florists, nurserymen and seedsmen	0	0.0	2.4	2.1
Toys, hobby, cycle and sports	1	7.7	7.1	5.5
Jewellers	0	0.0	2.8	5.1
Charity and second-hand shops	1	7.7	12.3	10.0
Other comparison goods retailers	0	0.0	1.9	5.7
Total	**13**	**100.0**	**100.0**	**100.0**

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

Hersham has a reasonable selection of non-retail services for a centre of its size (22 units), but there are no travel agents or betting shops/casinos/amusement outlets centres, as shown in Table H3.

Table H3 Mix of non-retail service uses – Hersham

Type	Number of units	% units	% units Borough average	% units UK average
Restaurant / café	6	28.6	35.6	25.1
Hot food takeaway	2	9.5	7.2	15.1
Public house / bar	1	4.8	3.9	11.9
Bank / other financial service	1	4.8	4.2	7.1
Betting shop / casino / amusement	0	0.0	1.6	3.6
Estate agent / valuer	1	4.8	11.4	7.3
Travel agent	0	0.0	0.7	1.4
Hairdresser / beauty parlour	7	33.3	31.7	27.1
Launderette / dry cleaner	3	14.3	3.6	1.5
Sub-total	**21**	**100.0**	**100.0**	**100.0**
Other non-retail services	1			
Total	**22**			

Source: Lichfields' site visit (September 2024) and Goad Plan UK averages (July 2024).

As in other centres in the Borough, there is a good representation of restaurants/cafés when compared with the national average, but there is lower representations of pubs/bars and hot food takeaways. Hersham has an above-average provision of hairdressers/beauty parlours and launderettes/dry cleaners (highest in the Borough). In terms of financial services, Hersham has no banks or building societies, and only a tax accountant. The remaining other non-retail service use in Hersham is a funeral director. Other community uses include Hersham Centre for the Community, All Saints Catholic Church and Hall and a post office.

As illustrated in Table H4, Hersham only has two national multiple outlets, including a Waitrose supermarket. The centre primarily has small independent outlets.

Table H4 Multiple retailers – Hersham

Comparison	Convenience	Food and Beverage
n/a	Waitrose	Costa

Source: Lichfields' site visit (September 2024).

Customer activities and catchment area

The Council's 2016 Retail Assessment gave Hersham Town Centre a convenience goods turnover of £25.3m in 2015, and a comparison goods turnover of £6.5m (uplifted to 2022 prices for comparison purposes and to account for inflation). This compares to respective turnovers of £30.5m and £6.1m in this Study. This shows a positive uplift in food spending in the centre, whilst the relatively small drop in comparison goods turnover shows the general resilience of Cobham's comparison good offer.

Around 24% of respondents in the study area had visited shops, services or leisure facilities in Hersham during the last year. The majority of visitors came from Zone 2 – Walton, closely followed by Zone 5 – Esher/Hersham and Zone 1 – Weybridge. Within Zone 5, Esher and Hersham attracted similar numbers of visitors. Hersham ranks the fifth most popular centre in the survey, behind Esher (31%) but attracting more visitors than East Molesey (17%). Hersham attracts similar proportions as Esher for households undertaking their main non-food shopping, at 0.7%. This is higher only than East Molesey (0.1%).

Survey results suggest the Waitrose acts as an anchor store for the centre. Around 4.7% throughout the survey area reported doing their main grocery shop at the Waitrose store, which was the most popular destination in the local zone. The Lidl outside of the centre attracted 4.3%. Of those that reported grocery shopping as part of a linked trip, 6.4% said this took place in Hersham which is comparable to other centres in the Borough and suggests healthy levels of linked convenience to comparison shopping.

The capacity analysis suggests Hersham has a combined retail and food/beverage turnover of over £42 million, which is predominantly convenience goods turnover (73%), primarily the Waitrose store. This combined turnover is the second lowest of the six main centres in the Borough. The centre attracts 66% of its trade from Zone 1 – Weybridge and Zone 5 – Esher/Hersham. Hersham attracts nearly all its trade from the northern half of the Borough.

Rental levels

Data from the Valuation Office Agency (VOA) shows that prime retail rental values in Hersham range between £200 and £282 per sq.m. Values of £275 per sq.m. and above are found within the Hersham centre, with values on Molesey Road and Hersham Green consistent at £200 per sq.m.

Accessibility

Hersham Railway Station is located 1.4km to the north-east, approximately a 20-minute walk or a short bus journey (via 564), but buses are infrequent, only one per hour. South Western Railway trains run routes to London Waterloo, Woking, Guildford and Aldershot.

There are four bus stops conveniently situated within Hersham, next to Hersham Green Park, Hersham Green Shopping Centre and Queens Road. The bus routes connect Hersham to Walton-on-Thames (458); Weybridge (515); Brooklands (515); Staines (458); Kingston (458, 515); Whiteley Village (555); Xcel Leisure Centre (564) and Heathrow Airport (555). However, the buses are relatively infrequent, at every hour or less.

Hersham has one public car park, detailed in Table H5, adjacent to Hersham Green Shopping Centre. The Waitrose car park is free for customers up to 2 hours, with a maximum of 4 hours.

Table H5 Car Parks - Hersham

Car Park	No. of Spaces	Charge Regime
New Berry Lane	32	Monday-Friday: 1 hour - £1.10 2 hours - £2.20 3 hours - £3.30 4 hours - £4.50 Over 4 hours (daily charge) - £5 Saturday: 1 hour - free 2 hours - £1.10 3 hours - £2.20 4 hours - £3.30 Over 4 hours (daily charge) - £5 Applicable Monday to Saturday 9am-6pm. Charges do not apply on Sundays, bank holidays or public holidays.
Hersham Green Shopping Centre / Waitrose	180 + 8 disabled bays + 7 parent & child bays	Monday-Sunday: Up to 2 hours - free Up to 4 hours (maximum) - £1.50 Available all day, every day.

Source: Elmbridge.gov.uk

Pedestrian accessibility and pavements in the centre are good. Pedestrian flows are relatively consistent throughout the centre. The household survey results regarding customer views suggest accessibility is not a significant issue in Hersham.

Environment and ambience

Hersham is a small but pleasant centre. Hersham Green provides open space with a children's playground, trees, planters, benches and bins. It is occasionally used as a venue for local community events, such as weekend circuses. Hersham Green is directly opposite to Hersham Green Shopping Centre. The shopping centre is anchored by a Waitrose and public toilets are available. The shopping centre is well-utilised, with only a few vacancies.

An outline planning application for the redevelopment of the shopping centre and its car park into a six-storey mixed-use residential scheme, including 'extra care' homes, is currently at planning committee under consideration.

The centre is relatively green with trees along the streets. Landscaping adds to the centre's appeal, with flower planters throughout the centre. There is adequate street lighting, seating and waste bins provided. Paving is clean and generally well-maintained. Traffic flow is quiet, contributing to a safe and secure environment.

Occurrence of crime

Overall crime rate data for Hersham is not available. However, few crimes were reported in Hersham. In July 2024, only two crimes were reported, with three in June (Police.uk). The month of May had slightly higher figures with seven reports. The majority of crimes were shoplifting offences in the central area.

SWOT analysis

Hersham's Strengths

- A high-quality public realm centred around Hersham Green, providing green space.
- A below-average shop vacancy rate.
- The Waitrose store acts as an anchor and generates linked trips to the centre.
- A good range of non-retail services for its size.

Hersham's Weaknesses

- The rail station is not within easy walking distance and bus connections are limited.
- There is a limited range of retail outlets, with few national multiples.
- A limited choice of comparison shops.

Hersham's Opportunities

- Improving links to the rail station could increase visitor numbers.
- Hersham Green provides ongoing opportunities to host temporary / pop up events.

Hersham's Threats

- There are a limited number of shop vacancies which could restrict opportunities to accommodate growth and investment.

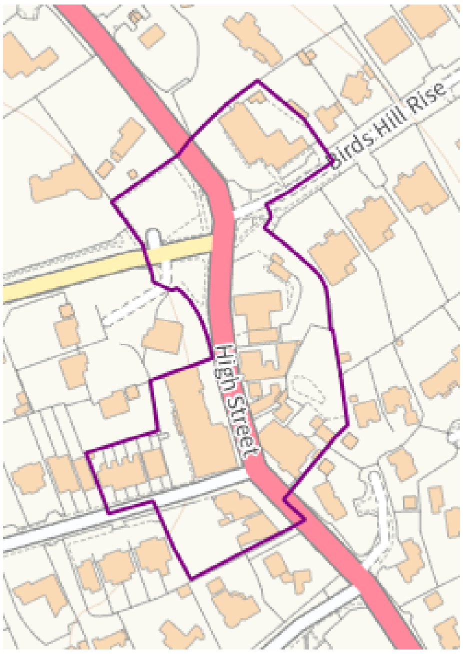
LOCAL CENTRES

There are nine designated Local Centres in Elmbridge Borough, as defined by the Core Strategy 2011. An audit of each local centre has been undertaken, shown at Table LC1 below, which excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses, which is taken as a snapshot at the time of the assessment.

The analysis includes a Local Needs Index (LNI), based on retail and service facilities that can be found within each local centres, in Table LC2.

Table LC1 Audit of Local Centres

Local Centre	Summary
Claygate  	Claygate is in the east of the Borough, approximately 1.6km south-east of Esher. Claygate railway station is partly within the centre, at its south-western corner. It is served by South Western Railway, with half-hourly trains to Guildford and London Waterloo. There are two bus stops in the centre, serving a single bus route (K3), which links to Putney Vale and Esher. Total number of shop units = 52 Class E units = 50 Vacant units = 3 Vacancy rate = 5.8% Visitors in the last year (from customer views survey): 11%, with the majority coming from Zone 4 – Claygate. VOA Rental Values: £380-400 per sq.m.
East Molesey Bridge Road  	East Molesey Bridge Road is adjacent to the northern boundary of the Borough, at the confluence of River Ember and River Thames. It is approximately 700 metres north-east of East Molesey. Hampton Court railway station is located within the east of the centre and is served by South Western Railway, with trains running every half hour to London Waterloo. The station is part of a redevelopment area for residential and retail units, as well as a hotel and new transport interchange. There are five bus stops in the centre, with links to West Molesey (411); Kew (R68); Kingston (411, 461); Addlestone (461); Chertsey South (461) and Thames Ditton (881). Total number of shop units = 86 Class E units = 79

Local Centre	Summary
	Vacant units = 10 Vacancy rate = 11.6% Visitors in the last year (from customer views survey): 10%, with the majority coming from Zone 3 – Molesey/Thames Ditton. VOA Rental Values: Creek Road and Hampton Court Parade £250 per sq.m.; Bridge Road £277-£300 per sq.m.
Hinchley Wood 	Hinchley Wood is located in the north-east of the Borough, approximately 1.8km north-east of Esher. Hinchley Wood railway station is within the centre, adjacent to its western border. It is served by South Western Railway, with half-hourly trains to Guildford and London Waterloo. There are two bus stops in the centre, serving a single bus route (K3), which links to Putney Vale and Esher. Total number of shop units = 30 Class E units = 15 Vacant units = 1 Vacancy rate = 3.3% VOA Rental Values: £250 per sq.m.
Oxshott 	Oxshott is located in the south-east of the Borough and is geographically isolated to the other designated centres, approximately 3.8km east of Cobham and 4.1km south of Esher. Oxshott railway station is around 600 metres to the north-west, outside of the centre. It is served by South Western Railway, with half-hourly trains to Guildford and London Waterloo. There are two bus stops in the centre, with links to Weybridge (C1); Cobham (408); Downside (513); Epsom (408) and Kingston (513). Total number of shop units = 23 Class E units = 9 Vacant units = 4 Vacancy rate = 17.4% VOA Rental Values: £350-£400 per sq.m.

<table>
<tr><th>Local Centre</th><th>Summary</th></tr>
<tr><td>Oatlands

</td><td>Oatlands is located in the west of the Borough, approximately 1.3km east of Weybridge and 1.9km south-west of Walton-on-Thames.

Oatlands does not have a railway station. The nearest stations are Weybridge and Walton-on-Thames, both equidistant at 1.7km away.

There are three bus stops just outside of the centre, along Oatlands Drive, one on the eastern edge and two next to the western end of the street. Only one bus route (461) comes through these stops, linking to Chertsey South; Addlestone and Kingston.

Total number of shop units = 28
Class E units = 26
Vacant units = 3
Vacancy rate = 10.7%

VOA Rental Values: £250 per sq.m.</td></tr>
<tr><td>Thames Ditton

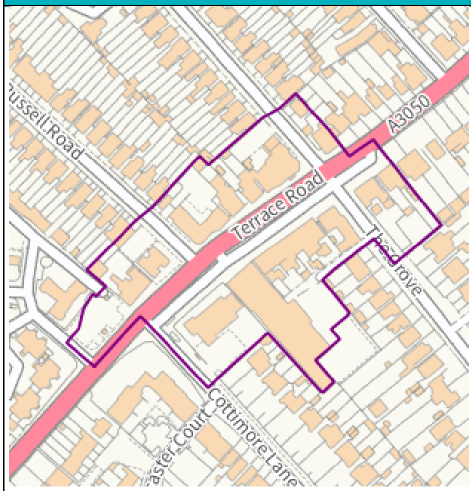
</td><td>Thames Ditton is located in the north-east of the Borough, close to the boundary and the River Thames. It is approximately 1.7km south-east of East Molesey, and between East Molesey Bridge Road and Hinchley Wood. Thames Ditton railway station is around 470 metres to the south-west, outside of the centre. It is served by South Western Railway, with half-hourly trains to Hampton Court and London Waterloo.

There are two bus stops in the centre, with links to Brooklands (514, 515); Downside (513) and Kingston (513, 514, 515).

Total number of shop units = 45
Class E units = 24
Vacant units = 2
Vacancy rate = 4.4%

Visitors in the last year (from customer views survey): 9%, with the majority coming from Zone 3 – Molesey/Thames Ditton, closely followed by Zone 4 – Claygate.

VOA Rental Values: £300 per sq.m.</td></tr>
<tr><td>Walton Terrace Road</td><td>Walton Terrace Road is located north of the Borough, only approximately 700 metres north-east of Walton-on-Thames.</td></tr>
</table>

Local Centre	Summary
	The centre does not have its own railway station, but shares the Walton-on-Thames station, 2km to the south, though there is no direct bus to reach it. The closest other rail stations are Hersham (2.2km away) and Shepperton (2.4km away). There are three bus stops within the centre and an additional one just outside the centre's boundaries. Bus routes link to Hersham (564); Weybridge (461); Xcel Leisure Centre (564); Chertsey South (461); Addlestone (461) and Kingston (461). Total number of shop units = 31 Class E units = 27 Vacant units = 4 Vacancy rate = 12.9% VOA Rental Values: £250 per sq.m.
Weybridge Queens Road 	Weybridge Queens Road is located in the east of the Borough, only approximately 700 metres south-east of Weybridge. The centre does not have its own railway station, but shares the Weybridge station, 1km to the south-west, with a direct bus (515) that loops up and around Weybridge to reach it. There are four bus stops within the centre, with links to Brooklands (514, 515) and Kingston (514, 515). Total number of shop units = 74 Class E units = 69 Vacant units = 5 Vacancy rate = 6.8% VOA Rental Values: £300-350 per sq.m.

Source: Elmbridge Core Strategy 2011-2026 and EBC's Retail Assessment 2024 and Google Maps.

Table LC2 Local Needs Index

	Claygate	East Molesey Bridge Road	Thames Ditton	Hinchley Wood	Oatlands	Oxshott	Walton Halfway	Walton Terrace Road	Weybridge Queens Road
Food/Convenience									
Banks									
Post Office									
Newsagent									
Off Licence									
Chemist									
Restaurant/ café/ takeaway									
Public house									
Bookmakers									
Launderette/ drycleaner									
Hairdresser/ beauty salon									
Florist									
Estate agents									
Doctor's surgery									
Community hall									
Library									
Total LNI score (out of 16)	**11**	**9**	**10**	**9**	**7**	**9**	**6**	**9**	**9**

Source: EBC's Retail Assessment 2024 and Google Maps.

Each local centre in Elmbridge has been allocated a score out of 16 in the LNI, corresponding to the number of categories of shops, services and community uses residents could expect to find within easy walking distance of their home. All centres have a medium-low score, with between 6 to 11 of the 16 categories represented. Claygate has the highest score whilst Walton Halfway has the lowest. Five of the nine centres scored a middling nine. The LNI scores and analysis provide a useful indicator of whether a centre meets some or all the needs of residents.

Appendix 3 Convenience Goods Assessment

Table 1 - Study area population projections

Zone	2024	2027	2030	2035	2040
1 - Weybridge	25,988	25,987	25,890	25,705	25,636
2 - Walton-on-Thames	27,016	27,011	27,046	27,111	27,273
3 - Molesey / Thames Ditton	27,217	27,213	27,209	27,264	27,370
4 - Claygate	23,204	23,178	23,021	22,823	22,981
5 - Esher / Hersham	18,445	18,439	18,403	18,373	18,425
6 - Cobham / Oxshott	18,887	18,833	18,710	18,501	18,412
7 - Shepperton	21,706	21,670	21,588	21,459	21,386
8 - Runnymede	33,494	33,838	34,150	34,565	34,738
9 - Byfleet	28,751	28,498	28,328	28,127	27,878
Total	**224,708**	**224,667**	**224,345**	**223,928**	**224,099**

Sources: Experian population projections 2024.

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	3,001	2,970	2,954	2,950	2,955
2 - Walton-on-Thames	2,650	2,622	2,608	2,604	2,609
3 - Molesey / Thames Ditton	2,737	2,709	2,694	2,690	2,695
4 - Claygate	2,956	2,925	2,910	2,906	2,911
5 - Esher / Hersham	2,800	2,771	2,756	2,752	2,757
6 - Cobham / Oxshott	3,028	2,996	2,981	2,976	2,982
7 - Shepperton	2,681	2,653	2,639	2,635	2,640
8 - Runnymede	2,508	2,482	2,469	2,465	2,469
9 - Byfleet	2,800	2,771	2,756	2,752	2,757

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£M)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	77.99	77.17	76.47	75.82	75.75
2 - Walton-on-Thames	71.59	70.83	70.54	70.61	71.16
3 - Molesey / Thames Ditton	74.49	73.71	73.31	73.35	73.77
4 - Claygate	68.59	67.80	66.99	66.32	66.89
5 - Esher / Hersham	51.65	51.09	50.72	50.56	50.80
6 - Cobham / Oxshott	57.19	56.43	55.77	55.06	54.90
7 - Shepperton	58.19	57.50	56.97	56.55	56.46
8 - Runnymede	84.00	83.98	84.30	85.20	85.78
9 - Byfleet	80.50	78.97	78.08	77.42	76.87
Total	**624.20**	**617.48**	**613.15**	**610.89**	**612.36**

Source: Tables 1 and 2

Table 4 - Base year 2024 convenience goods market shares by zone (%)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow
Zone 1 - Brooklands Centre, Byfleet	22.6%	8.9%	1.7%	2.9%	5.6%	8.6%	3.4%	15.9%	36.2%	2.0%
Zone 1 - Weybridge Centre	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 1 - Morrisons Weybridge	14.0%	0.6%	0.5%	0.0%	1.3%	0.3%	0.3%	3.0%	0.0%	2.0%
Zone 1 - Waitrose Weybridge	16.8%	0.6%	0.0%	0.0%	0.0%	0.0%	5.2%	3.7%	0.0%	2.0%
Zone 1 - Other	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	1.0%	0.0%	2.0%
Zone 2 - Aldi Walton	1.2%	6.8%	1.4%	0.8%	2.7%	0.0%	0.9%	0.0%	0.0%	2.0%
Zone 2 - Walton Halfway	0.1%	1.7%	0.8%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 2 - M&S Walton	0.1%	5.1%	0.2%	0.2%	0.6%	0.0%	0.7%	0.0%	0.0%	2.0%
Zone 2 - Sainsbury's Walton	2.8%	31.4%	6.0%	0.0%	5.3%	0.0%	4.7%	1.3%	0.2%	2.0%
Zone 2 - Other	0.0%	8.9%	0.5%	0.5%	1.4%	0.0%	0.0%	0.7%	0.0%	2.0%
Zone 3 - Thames Ditton	0.0%	0.0%	2.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - East Molesey	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - West Molesey	0.2%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - Tesco Hurst Park	0.0%	9.0%	41.3%	6.1%	3.7%	0.0%	1.2%	0.0%	0.0%	2.0%
Zone 3 - Tesco East Molesey	0.0%	1.2%	7.6%	3.5%	0.0%	3.1%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Hinchley Wood	0.0%	0.0%	0.1%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Claygate	0.0%	0.0%	0.0%	16.3%	1.3%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Other	0.0%	0.0%	2.5%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Lidl Hersham	2.0%	9.8%	2.6%	10.1%	15.5%	1.0%	0.5%	1.1%	0.0%	2.0%
Zone 5 - Hersham Centre	1.5%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Esher Centre	0.0%	0.0%	0.0%	3.6%	3.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Waitrose Esher	0.0%	0.0%	4.9%	19.3%	21.7%	0.3%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Waitrose Hersham	12.3%	4.5%	3.5%	2.1%	21.0%	1.7%	0.3%	0.3%	0.0%	2.0%
Zone 5 - Other	0.0%	0.0%	0.0%	0.9%	1.9%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Oxshott	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Cobham Centre	0.0%	0.0%	0.0%	0.1%	2.7%	5.0%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Sainsbury's Bridge Way	3.3%	0.8%	1.2%	6.1%	4.3%	14.1%	0.0%	0.5%	4.0%	2.0%
Zone 6 - Waitrose Cobham	7.2%	2.5%	0.0%	0.0%	0.4%	45.3%	0.0%	0.0%	1.7%	2.0%
Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	2.0%
Elmbridge Borough Total	**93.3%**	**91.7%**	**81.7%**	**77.7%**	**95.7%**	**82.0%**	**19.7%**	**27.6%**	**42.0%**	**n/a**
Zone 7 - Shepperton	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	18.4%	0.1%	0.0%	n/a
Zone 7 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	n/a
Zone 8 - Chertsey Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	22.9%	0.6%	n/a
Zone 8 - Addlestone Centre	4.1%	2.0%	0.0%	0.0%	0.3%	1.5%	0.2%	31.6%	0.0%	n/a
Zone 8 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	0.0%	n/a
Zone 9 - Byfleet	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	7.3%	n/a
Zone 9 - West Byfleet	0.0%	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	1.8%	21.6%	n/a
Zone 9 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.1%	7.2%	n/a
Other study area total	**4.2%**	**2.4%**	**0.5%**	**0.1%**	**0.4%**	**2.3%**	**27.7%**	**64.0%**	**36.7%**	**n/a**
Ashford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	n/a
Chessington	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Epsom	0.0%	0.0%	0.0%	0.0%	0.4%	1.7%	0.0%	0.0%	0.0%	n/a
Felton	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	n/a
Guildford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	n/a
Hampton/Hampton Hill	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	n/a
Kingston-upon-Thames	0.0%	0.0%	3.9%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Leatherhead	0.0%	0.0%	0.4%	1.2%	0.4%	14.0%	0.0%	0.0%	0.0%	n/a
New Malden	0.0%	0.0%	2.0%	1.2%	2.2%	0.0%	0.0%	0.0%	0.0%	n/a
Staines	2.1%	0.0%	0.0%	1.5%	0.0%	0.0%	8.4%	4.3%	2.0%	n/a
Sunbury-on-Thames	0.0%	4.7%	1.7%	0.0%	0.0%	0.0%	41.0%	0.0%	0.0%	n/a
Surbiton	0.0%	0.6%	8.1%	14.2%	0.3%	0.0%	0.0%	0.0%	0.0%	n/a
Tolworth	0.0%	0.0%	0.1%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Woking	0.0%	0.2%	0.0%	0.0%	0.6%	0.0%	0.0%	2.8%	12.0%	n/a
Elsewhere	0.0%	0.4%	1.1%	0.6%	0.0%	0.0%	0.2%	1.3%	0.6%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**n/a**

Source: NEMS Household Survey August 2024 and Lichfields' analysis.

Table 5 - Base year 2024 convenience goods market shares by zone (%)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2024	£77.99	£71.59	£74.49	£68.59	£51.65	£57.19	£58.19	£84.00	£80.50		**£624.20**
Zone 1 - Brooklands Centre, Byfleet	£17.64	£6.35	£1.24	£1.98	£2.89	£4.89	£1.99	£13.38	£29.13	£1.62	£81.11
Zone 1 - Weybridge Centre	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24
Zone 1 - Morrisons Weybridge	£10.92	£0.45	£0.39	£0.00	£0.68	£0.16	£0.20	£2.53	£0.00	£0.31	£15.63
Zone 1 - Waitrose Weybridge	£13.10	£0.39	£0.00	£0.00	£0.00	£0.00	£3.04	£3.11	£0.00	£0.40	£20.04
Zone 1 - Other	£6.95	£0.00	£0.00	£0.00	£0.00	£0.00	£1.41	£0.88	£0.00	£0.19	£9.43
Zone 2 - Aldi Walton	£0.90	£4.86	£1.07	£0.57	£1.41	£0.00	£0.52	£0.00	£0.00	£0.19	£9.51
Zone 2 - Walton Halfway	£0.08	£1.20	£0.57	£0.00	£1.43	£0.00	£0.00	£0.00	£0.00	£0.07	£3.34
Zone 2 - M&S Walton	£0.12	£3.67	£0.18	£0.16	£0.29	£0.00	£0.42	£0.00	£0.00	£0.10	£4.94
Zone 2 - Sainsbury's Walton	£2.15	£22.46	£4.44	£0.00	£2.74	£0.00	£2.72	£1.12	£0.13	£0.73	£36.49
Zone 2 - Other	£0.00	£6.38	£0.37	£0.35	£0.73	£0.00	£0.00	£0.60	£0.00	£0.17	£8.59
Zone 3 - Thames Ditton	£0.00	£0.00	£2.11	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£2.22
Zone 3 - East Molesey	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.29
Zone 3 - West Molesey	£0.15	£0.00	£2.89	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.11
Zone 3 - Tesco Hurst Park	£0.00	£6.43	£30.77	£4.15	£1.92	£0.00	£0.68	£0.00	£0.00	£0.90	£44.85
Zone 3 - Tesco East Molesey	£0.00	£0.84	£5.67	£2.43	£0.00	£1.78	£0.00	£0.00	£0.00	£0.22	£10.93
Zone 4 - Hinchley Wood	£0.00	£0.00	£0.09	£1.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£1.43
Zone 4 - Claygate	£0.00	£0.00	£0.00	£11.18	£0.65	£0.00	£0.00	£0.00	£0.00	£0.24	£12.08
Zone 4 - Other	£0.00	£0.00	£1.84	£2.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£4.02
Zone 5 - Lidl Hersham	£1.57	£7.04	£1.92	£6.95	£8.03	£0.60	£0.29	£0.94	£0.00	£0.56	£27.88
Zone 5 - Hersham Centre	£1.16	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.03	£1.42
Zone 5 - Esher Centre	£0.00	£0.00	£0.00	£2.47	£1.56	£0.00	£0.00	£0.00	£0.00	£0.08	£4.11
Zone 5 - Waitrose Esher	£0.00	£0.00	£3.63	£13.26	£11.21	£0.15	£0.00	£0.00	£0.00	£0.58	£28.82
Zone 5 - Waitrose Hersham	£9.63	£3.22	£2.59	£1.47	£10.84	£0.97	£0.17	£0.24	£0.00	£0.59	£29.73
Zone 5 - Other	£0.00	£0.00	£0.00	£0.64	£0.96	£0.00	£0.00	£0.00	£0.00	£0.03	£1.63
Zone 6 - Oxshott	£0.00	£0.00	£0.00	£0.00	£0.00	£1.15	£0.00	£0.00	£0.00	£0.02	£1.17
Zone 6 - Cobham Centre	£0.00	£0.00	£0.00	£0.06	£1.41	£2.87	£0.00	£0.00	£0.00	£0.09	£4.43
Zone 6 - Sainsbury's Bridge Way	£2.58	£0.58	£0.86	£4.16	£2.24	£8.09	£0.00	£0.39	£3.18	£0.45	£22.54
Zone 6 - Waitrose Cobham	£5.63	£1.81	£0.00	£0.00	£0.21	£25.88	£0.00	£0.00	£1.39	£0.71	£35.63
Zone 6 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.00	£0.00	£0.00	£0.01	£0.37
Elmbridge Borough Total	**£72.80**	**£65.67**	**£60.89**	**£53.31**	**£49.42**	**£46.91**	**£11.44**	**£23.18**	**£33.83**	**£8.52**	**£425.98**
Zone 7 - Shepperton	£0.00	£0.10	£0.00	£0.07	£0.00	£0.00	£10.73	£0.10	£0.00	n/a	£11.00
Zone 7 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	n/a	£0.70
											£0.00
Zone 8 - Chertsey Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.55	£19.25	£0.48	n/a	£24.28
Zone 8 - Addlestone Centre	£3.18	£1.45	£0.00	£0.00	£0.14	£0.88	£0.12	£26.57	£0.00	n/a	£32.34
Zone 8 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.08	£0.00	n/a	£6.08
											£0.00
Zone 9 - Byfleet	£0.12	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.10	£5.91	n/a	£6.19
Zone 9 - West Byfleet	£0.00	£0.15	£0.39	£0.00	£0.00	£0.00	£0.00	£1.54	£17.43	n/a	£19.51
Zone 9 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.10	£5.76	n/a	£6.30
Other study area total	**£3.30**	**£1.70**	**£0.39**	**£0.07**	**£0.21**	**£1.32**	**£16.10**	**£53.74**	**£29.58**	**£0.00**	**£106.41**
Ashford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	n/a	£0.45
Chessington	£0.00	£0.00	£0.00	£0.93	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.93
Epsom	£0.00	£0.00	£0.00	£0.00	£0.21	£0.98	£0.00	£0.00	£0.00	n/a	£1.19
Felton	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.88	£0.00	£0.00	n/a	£1.11
Guildford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.33	n/a	£5.33
Hampton/Hampton Hill	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.46	£0.00	£0.00	n/a	£0.80
Kingston-upon-Thames	£0.00	£0.00	£2.91	£0.30	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£3.21
Leatherhead	£0.00	£0.00	£0.27	£0.81	£0.19	£7.98	£0.00	£0.00	£0.00	n/a	£9.25
New Malden	£0.00	£0.00	£1.49	£0.83	£1.16	£0.00	£0.00	£0.00	£0.00	n/a	£3.48
Staines	£1.66	£0.00	£0.00	£1.03	£0.00	£0.00	£4.89	£3.60	£1.57	n/a	£12.75
Sunbury-on-Thames	£0.00	£3.34	£1.29	£0.00	£0.00	£0.00	£23.86	£0.00	£0.00	n/a	£28.48
Surbiton	£0.00	£0.43	£6.06	£9.73	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£16.36
Tolworth	£0.00	£0.00	£0.06	£1.17	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.23
Woking	£0.00	£0.17	£0.00	£0.00	£0.32	£0.00	£0.00	£2.37	£9.69	n/a	£12.55
Elsewhere	£0.00	£0.29	£0.78	£0.40	£0.00	£0.00	£0.12	£1.12	£0.50	n/a	£3.21
TOTAL	**£77.99**	**£71.59**	**£74.49**	**£68.59**	**£51.65**	**£57.19**	**£58.19**	**£84.00**	**£80.50**	**n/a**	**£624.20**

Source: Table 3 and Table 4

Table 6 - Future 2027 convenience goods expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2027	£77.17	£70.83	£73.71	£67.80	£51.09	£56.43	£57.50	£83.98	£80.50		**£619.01**
Zone 1 - Brooklands Centre, Byfleet	£17.46	£6.28	£1.23	£1.96	£2.86	£4.83	£1.96	£13.37	£29.13	£1.61	£80.69
Zone 1 - Weybridge Centre	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24
Zone 1 - Morrisons Weybridge	£10.81	£0.45	£0.39	£0.00	£0.67	£0.16	£0.20	£2.52	£0.00	£0.31	£15.49
Zone 1 - Waitrose Weybridge	£12.96	£0.39	£0.00	£0.00	£0.00	£0.00	£3.00	£3.11	£0.00	£0.40	£19.86
Zone 1 - Other	£6.87	£0.00	£0.00	£0.00	£0.00	£0.00	£1.40	£0.88	£0.00	£0.19	£9.34
Zone 2 - Aldi Walton	£0.89	£4.80	£1.06	£0.56	£1.40	£0.00	£0.51	£0.00	£0.00	£0.19	£9.41
Zone 2 - Walton Halfway	£0.08	£1.18	£0.56	£0.00	£1.42	£0.00	£0.00	£0.00	£0.00	£0.07	£3.30
Zone 2 - M&S Walton	£0.12	£3.63	£0.18	£0.16	£0.29	£0.00	£0.42	£0.00	£0.00	£0.10	£4.89
Zone 2 - Sainsbury's Walton	£2.13	£22.22	£4.39	£0.00	£2.71	£0.00	£2.69	£1.11	£0.13	£0.72	£36.11
Zone 2 - Other	£0.00	£6.31	£0.36	£0.34	£0.72	£0.00	£0.00	£0.60	£0.00	£0.17	£8.50
Zone 3 - Thames Ditton	£0.00	£0.00	£2.09	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£2.20
Zone 3 - East Molesey	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.28
Zone 3 - West Molesey	£0.15	£0.00	£2.86	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.07
Zone 3 - Tesco Hurst Park	£0.00	£6.36	£30.44	£4.11	£1.90	£0.00	£0.67	£0.00	£0.00	£0.89	£44.37
Zone 3 - Tesco East Molesey	£0.00	£0.83	£5.61	£2.40	£0.00	£1.76	£0.00	£0.00	£0.00	£0.22	£10.81
Zone 4 - Hinchley Wood	£0.00	£0.00	£0.09	£1.29	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£1.41
Zone 4 - Claygate	£0.00	£0.00	£0.00	£11.05	£0.65	£0.00	£0.00	£0.00	£0.00	£0.24	£11.94
Zone 4 - Other	£0.00	£0.00	£1.82	£2.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.98
Zone 5 - Lidl Hersham	£1.55	£6.96	£1.90	£6.87	£7.94	£0.59	£0.28	£0.94	£0.00	£0.55	£27.59
Zone 5 - Hersham Centre	£1.15	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.03	£1.41
Zone 5 - Esher Centre	£0.00	£0.00	£0.00	£2.44	£1.55	£0.00	£0.00	£0.00	£0.00	£0.08	£4.06
Zone 5 - Waitrose Esher	£0.00	£0.00	£3.59	£13.11	£11.09	£0.14	£0.00	£0.00	£0.00	£0.57	£28.50
Zone 5 - Waitrose Hersham	£9.53	£3.19	£2.56	£1.46	£10.72	£0.96	£0.17	£0.24	£0.00	£0.59	£29.41
Zone 5 - Other	£0.00	£0.00	£0.00	£0.63	£0.95	£0.00	£0.00	£0.00	£0.00	£0.03	£1.62
Zone 6 - Oxshott	£0.00	£0.00	£0.00	£0.00	£0.00	£1.13	£0.00	£0.00	£0.00	£0.02	£1.16
Zone 6 - Cobham Centre	£0.00	£0.00	£0.00	£0.06	£1.39	£2.84	£0.00	£0.00	£0.00	£0.09	£4.37
Zone 6 - Sainsbury's Bridge Way	£2.56	£0.58	£0.85	£4.11	£2.21	£7.99	£0.00	£0.39	£3.18	£0.45	£22.31
Zone 6 - Waitrose Cobham	£5.57	£1.79	£0.00	£0.00	£0.21	£25.54	£0.00	£0.00	£1.39	£0.70	£35.19
Zone 6 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.01	£0.37
Elmbridge Borough Total	**£72.04**	**£64.96**	**£60.25**	**£52.70**	**£48.89**	**£46.29**	**£11.31**	**£23.17**	**£33.83**	**£8.44**	**£421.89**
Zone 7 - Shepperton	£0.00	£0.10	£0.00	£0.07	£0.00	£0.00	£10.60	£0.10	£0.00	n/a	£10.87
Zone 7 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	n/a	£0.70
											£0.00
Zone 8 - Chertsey Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.49	£19.25	£0.48	n/a	£24.22
Zone 8 - Addlestone Centre	£3.15	£1.44	£0.00	£0.00	£0.14	£0.86	£0.11	£26.56	£0.00	n/a	£32.27
Zone 8 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.08	£0.00	n/a	£6.08
											£0.00
Zone 9 - Byfleet	£0.12	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.10	£5.91	n/a	£6.19
Zone 9 - West Byfleet	£0.00	£0.15	£0.39	£0.00	£0.00	£0.00	£0.00	£1.54	£17.43	n/a	£19.50
Zone 9 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.10	£5.76	n/a	£6.30
Other study area total	**£3.27**	**£1.69**	**£0.39**	**£0.07**	**£0.21**	**£1.31**	**£15.90**	**£53.72**	**£29.58**	**£0.00**	**£106.12**
Ashford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	n/a	£0.45
Chessington	£0.00	£0.00	£0.00	£0.92	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.92
Epsom	£0.00	£0.00	£0.00	£0.00	£0.21	£0.97	£0.00	£0.00	£0.00	n/a	£1.17
Felton	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.87	£0.00	£0.00	n/a	£1.10
Guildford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.33	n/a	£5.33
Hampton/Hampton Hill	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	n/a	£0.79
Kingston-upon-Thames	£0.00	£0.00	£2.88	£0.30	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£3.18
Leatherhead	£0.00	£0.00	£0.26	£0.80	£0.19	£7.87	£0.00	£0.00	£0.00	n/a	£9.13
New Malden	£0.00	£0.00	£1.48	£0.82	£1.14	£0.00	£0.00	£0.00	£0.00	n/a	£3.44
Staines	£1.64	£0.00	£0.00	£1.02	£0.00	£0.00	£4.83	£3.59	£1.57	n/a	£12.66
Sunbury-on-Thames	£0.00	£3.30	£1.27	£0.00	£0.00	£0.00	£23.57	£0.00	£0.00	n/a	£28.15
Surbiton	£0.00	£0.42	£5.99	£9.62	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£16.18
Tolworth	£0.00	£0.00	£0.06	£1.16	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.22
Woking	£0.00	£0.16	£0.00	£0.00	£0.32	£0.00	£0.00	£2.37	£9.69	n/a	£12.54
Elsewhere	£0.00	£0.29	£0.77	£0.40	£0.00	£0.00	£0.11	£1.12	£0.50	n/a	£3.19
TOTAL	**£77.17**	**£70.83**	**£73.71**	**£67.80**	**£51.09**	**£56.43**	**£57.50**	**£83.98**	**£80.50**	**n/a**	**£619.01**

Source: Table 3 and Table 4

Table 7 - Future 2030 convenience goods expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2030	£76.47	£70.54	£73.31	£66.99	£50.72	£55.77	£56.97	£84.30	£78.08		**£613.15**
Zone 1 - Brooklands Centre, Byfleet	£17.30	£6.25	£1.22	£1.93	£2.84	£4.77	£1.95	£13.43	£28.26	£1.59	£79.54
Zone 1 - Weybridge Centre	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23
Zone 1 - Morrisons Weybridge	£10.71	£0.44	£0.38	£0.00	£0.66	£0.15	£0.19	£2.53	£0.00	£0.31	£15.39
Zone 1 - Waitrose Weybridge	£12.84	£0.39	£0.00	£0.00	£0.00	£0.00	£2.97	£3.12	£0.00	£0.39	£19.72
Zone 1 - Other	£6.81	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£0.88	£0.00	£0.19	£9.27
Zone 2 - Aldi Walton	£0.88	£4.79	£1.05	£0.55	£1.39	£0.00	£0.51	£0.00	£0.00	£0.19	£9.36
Zone 2 - Walton Halfway	£0.07	£1.18	£0.56	£0.00	£1.41	£0.00	£0.00	£0.00	£0.00	£0.07	£3.28
Zone 2 - M&S Walton	£0.11	£3.62	£0.18	£0.16	£0.29	£0.00	£0.41	£0.00	£0.00	£0.10	£4.86
Zone 2 - Sainsbury's Walton	£2.11	£22.13	£4.37	£0.00	£2.69	£0.00	£2.66	£1.12	£0.13	£0.72	£35.93
Zone 2 - Other	£0.00	£6.29	£0.36	£0.34	£0.71	£0.00	£0.00	£0.60	£0.00	£0.17	£8.47
Zone 3 - Thames Ditton	£0.00	£0.00	£2.07	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£2.19
Zone 3 - East Molesey	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.28
Zone 3 - West Molesey	£0.15	£0.00	£2.85	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.06
Zone 3 - Tesco Hurst Park	£0.00	£6.33	£30.28	£4.06	£1.88	£0.00	£0.67	£0.00	£0.00	£0.88	£44.10
Zone 3 - Tesco East Molesey	£0.00	£0.82	£5.58	£2.37	£0.00	£1.74	£0.00	£0.00	£0.00	£0.21	£10.72
Zone 4 - Hinchley Wood	£0.00	£0.00	£0.09	£1.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£1.40
Zone 4 - Claygate	£0.00	£0.00	£0.00	£10.92	£0.64	£0.00	£0.00	£0.00	£0.00	£0.24	£11.80
Zone 4 - Other	£0.00	£0.00	£1.81	£2.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.94
Zone 5 - Lidl Hersham	£1.54	£6.93	£1.89	£6.79	£7.88	£0.58	£0.28	£0.95	£0.00	£0.55	£27.38
Zone 5 - Hersham Centre	£1.14	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.03	£1.39
Zone 5 - Esher Centre	£0.00	£0.00	£0.00	£2.41	£1.53	£0.00	£0.00	£0.00	£0.00	£0.08	£4.02
Zone 5 - Waitrose Esher	£0.00	£0.00	£3.57	£12.95	£11.01	£0.14	£0.00	£0.00	£0.00	£0.56	£28.24
Zone 5 - Waitrose Hersham	£9.44	£3.17	£2.55	£1.44	£10.64	£0.95	£0.17	£0.24	£0.00	£0.58	£29.19
Zone 5 - Other	£0.00	£0.00	£0.00	£0.62	£0.95	£0.00	£0.00	£0.00	£0.00	£0.03	£1.60
Zone 6 - Oxshott	£0.00	£0.00	£0.00	£0.00	£0.00	£1.12	£0.00	£0.00	£0.00	£0.02	£1.14
Zone 6 - Cobham Centre	£0.00	£0.00	£0.00	£0.06	£1.38	£2.80	£0.00	£0.00	£0.00	£0.09	£4.33
Zone 6 - Sainsbury's Bridge Way	£2.53	£0.57	£0.84	£4.06	£2.20	£7.89	£0.00	£0.39	£3.09	£0.44	£22.02
Zone 6 - Waitrose Cobham	£5.52	£1.78	£0.00	£0.00	£0.20	£25.24	£0.00	£0.00	£1.35	£0.70	£34.78
Zone 6 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.01	£0.37
Elmbridge Borough Total	**£71.39**	**£64.70**	**£59.92**	**£52.06**	**£48.54**	**£45.74**	**£11.20**	**£23.26**	**£32.82**	**£8.36**	**£418.00**
Zone 7 - Shepperton	£0.00	£0.10	£0.00	£0.07	£0.00	£0.00	£10.50	£0.10	£0.00	n/a	£10.77
Zone 7 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£0.00	£0.00	n/a	£0.69
											£0.00
Zone 8 - Chertsey Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.45	£19.32	£0.47	n/a	£24.24
Zone 8 - Addlestone Centre	£3.12	£1.43	£0.00	£0.00	£0.14	£0.85	£0.11	£26.66	£0.00	n/a	£32.32
Zone 8 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.10	£0.00	n/a	£6.10
											£0.00
Zone 9 - Byfleet	£0.11	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.10	£5.73	n/a	£6.01
Zone 9 - West Byfleet	£0.00	£0.15	£0.38	£0.00	£0.00	£0.00	£0.00	£1.55	£16.90	n/a	£18.98
Zone 9 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.10	£5.59	n/a	£6.12
Other study area total	**£3.24**	**£1.68**	**£0.38**	**£0.07**	**£0.20**	**£1.29**	**£15.76**	**£53.93**	**£28.69**	**£0.00**	**£105.24**
Ashford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	n/a	£0.44
Chessington	£0.00	£0.00	£0.00	£0.91	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.91
Epsom	£0.00	£0.00	£0.00	£0.00	£0.20	£0.96	£0.00	£0.00	£0.00	n/a	£1.16
Felton	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	n/a	£1.09
Guildford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.17	n/a	£5.17
Hampton/Hampton Hill	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	n/a	£0.79
Kingston-upon-Thames	£0.00	£0.00	£2.87	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£3.16
Leatherhead	£0.00	£0.00	£0.26	£0.79	£0.19	£7.78	£0.00	£0.00	£0.00	n/a	£9.02
New Malden	£0.00	£0.00	£1.47	£0.81	£1.14	£0.00	£0.00	£0.00	£0.00	n/a	£3.41
Staines	£1.63	£0.00	£0.00	£1.01	£0.00	£0.00	£4.79	£3.61	£1.52	n/a	£12.55
Sunbury-on-Thames	£0.00	£3.29	£1.27	£0.00	£0.00	£0.00	£23.36	£0.00	£0.00	n/a	£27.91
Surbiton	£0.00	£0.42	£5.96	£9.51	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£16.03
Tolworth	£0.00	£0.00	£0.06	£1.14	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.20
Woking	£0.00	£0.16	£0.00	£0.00	£0.31	£0.00	£0.00	£2.38	£9.40	n/a	£12.26
Elsewhere	£0.00	£0.29	£0.77	£0.39	£0.00	£0.00	£0.11	£1.12	£0.48	n/a	£3.17
TOTAL	**£76.47**	**£70.54**	**£73.31**	**£66.99**	**£50.72**	**£55.77**	**£56.97**	**£84.30**	**£78.08**	**n/a**	**£613.15**

Source: Table 3 and Table 4

Table 8 - Future 2035 convenience goods expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2035	£75.82	£70.61	£73.35	£66.32	£50.56	£55.06	£56.55	£85.20	£77.42		**£610.89**
Zone 1 - Brooklands Centre, Byfleet	£17.15	£6.26	£1.22	£1.92	£2.83	£4.71	£1.93	£13.57	£28.02	£1.58	£79.19
Zone 1 - Weybridge Centre	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23
Zone 1 - Morrisons Weybridge	£10.62	£0.44	£0.38	£0.00	£0.66	£0.15	£0.19	£2.56	£0.00	£0.31	£15.32
Zone 1 - Waitrose Weybridge	£12.73	£0.39	£0.00	£0.00	£0.00	£0.00	£2.95	£3.16	£0.00	£0.39	£19.62
Zone 1 - Other	£6.75	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.89	£0.00	£0.18	£9.21
Zone 2 - Aldi Walton	£0.87	£4.79	£1.05	£0.55	£1.38	£0.00	£0.50	£0.00	£0.00	£0.19	£9.34
Zone 2 - Walton Halfway	£0.07	£1.18	£0.56	£0.00	£1.40	£0.00	£0.00	£0.00	£0.00	£0.07	£3.28
Zone 2 - M&S Walton	£0.11	£3.62	£0.18	£0.16	£0.29	£0.00	£0.41	£0.00	£0.00	£0.10	£4.86
Zone 2 - Sainsbury's Walton	£2.09	£22.15	£4.37	£0.00	£2.68	£0.00	£2.64	£1.13	£0.13	£0.72	£35.92
Zone 2 - Other	£0.00	£6.29	£0.36	£0.34	£0.71	£0.00	£0.00	£0.61	£0.00	£0.17	£8.48
Zone 3 - Thames Ditton	£0.00	£0.00	£2.08	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£2.19
Zone 3 - East Molesey	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.28
Zone 3 - West Molesey	£0.15	£0.00	£2.85	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.06
Zone 3 - Tesco Hurst Park	£0.00	£6.34	£30.29	£4.02	£1.88	£0.00	£0.66	£0.00	£0.00	£0.88	£44.07
Zone 3 - Tesco East Molesey	£0.00	£0.83	£5.58	£2.34	£0.00	£1.71	£0.00	£0.00	£0.00	£0.21	£10.68
Zone 4 - Hinchley Wood	£0.00	£0.00	£0.09	£1.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£1.39
Zone 4 - Claygate	£0.00	£0.00	£0.00	£10.81	£0.64	£0.00	£0.00	£0.00	£0.00	£0.23	£11.68
Zone 4 - Other	£0.00	£0.00	£1.81	£2.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.92
Zone 5 - Lidl Hersham	£1.52	£6.94	£1.89	£6.72	£7.86	£0.58	£0.28	£0.96	£0.00	£0.55	£27.29
Zone 5 - Hersham Centre	£1.13	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.03	£1.38
Zone 5 - Esher Centre	£0.00	£0.00	£0.00	£2.38	£1.53	£0.00	£0.00	£0.00	£0.00	£0.08	£3.99
Zone 5 - Waitrose Esher	£0.00	£0.00	£3.57	£12.82	£10.97	£0.14	£0.00	£0.00	£0.00	£0.56	£28.07
Zone 5 - Waitrose Hersham	£9.36	£3.18	£2.55	£1.43	£10.61	£0.94	£0.17	£0.24	£0.00	£0.58	£29.05
Zone 5 - Other	£0.00	£0.00	£0.00	£0.62	£0.94	£0.00	£0.00	£0.00	£0.00	£0.03	£1.59
Zone 6 - Oxshott	£0.00	£0.00	£0.00	£0.00	£0.00	£1.11	£0.00	£0.00	£0.00	£0.02	£1.13
Zone 6 - Cobham Centre	£0.00	£0.00	£0.00	£0.06	£1.38	£2.77	£0.00	£0.00	£0.00	£0.09	£4.28
Zone 6 - Sainsbury's Bridge Way	£2.51	£0.57	£0.84	£4.02	£2.19	£7.79	£0.00	£0.40	£3.06	£0.44	£21.83
Zone 6 - Waitrose Cobham	£5.47	£1.78	£0.00	£0.00	£0.20	£24.92	£0.00	£0.00	£1.34	£0.69	£34.40
Zone 6 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.01	£0.36
Elmbridge Borough Total	**£70.77**	**£64.76**	**£59.96**	**£51.54**	**£48.39**	**£45.16**	**£11.12**	**£23.51**	**£32.54**	**£8.32**	**£416.08**
Zone 7 - Shepperton	£0.00	£0.10	£0.00	£0.07	£0.00	£0.00	£10.43	£0.10	£0.00	n/a	£10.69
Zone 7 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	n/a	£0.68
											£0.00
Zone 8 - Chertsey Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.42	£19.53	£0.46	n/a	£24.41
Zone 8 - Addlestone Centre	£3.09	£1.43	£0.00	£0.00	£0.14	£0.84	£0.11	£26.95	£0.00	n/a	£32.57
Zone 8 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.17	£0.00	n/a	£6.17
											£0.00
Zone 9 - Byfleet	£0.11	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.10	£5.68	n/a	£5.96
Zone 9 - West Byfleet	£0.00	£0.15	£0.38	£0.00	£0.00	£0.00	£0.00	£1.57	£16.76	n/a	£18.86
Zone 9 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.10	£5.54	n/a	£6.07
Other study area total	**£3.21**	**£1.68**	**£0.38**	**£0.07**	**£0.20**	**£1.27**	**£15.64**	**£54.51**	**£28.44**	**£0.00**	**£105.41**
Ashford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	n/a	£0.44
Chessington	£0.00	£0.00	£0.00	£0.90	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.90
Epsom	£0.00	£0.00	£0.00	£0.00	£0.20	£0.94	£0.00	£0.00	£0.00	n/a	£1.15
Felton	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	n/a	£1.08
Guildford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.13	n/a	£5.13
Hampton/Hampton Hill	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	n/a	£0.78
Kingston-upon-Thames	£0.00	£0.00	£2.87	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£3.16
Leatherhead	£0.00	£0.00	£0.26	£0.79	£0.19	£7.68	£0.00	£0.00	£0.00	n/a	£8.92
New Malden	£0.00	£0.00	£1.47	£0.80	£1.13	£0.00	£0.00	£0.00	£0.00	n/a	£3.40
Staines	£1.62	£0.00	£0.00	£1.00	£0.00	£0.00	£4.75	£3.65	£1.51	n/a	£12.52
Sunbury-on-Thames	£0.00	£3.29	£1.27	£0.00	£0.00	£0.00	£23.18	£0.00	£0.00	n/a	£27.74
Surbiton	£0.00	£0.42	£5.97	£9.41	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£15.94
Tolworth	£0.00	£0.00	£0.06	£1.13	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.19
Woking	£0.00	£0.16	£0.00	£0.00	£0.31	£0.00	£0.00	£2.40	£9.32	n/a	£12.20
Elsewhere	£0.00	£0.29	£0.77	£0.39	£0.00	£0.00	£0.11	£1.14	£0.48	n/a	£3.18
TOTAL	**£75.82**	**£70.61**	**£73.35**	**£66.32**	**£50.56**	**£55.06**	**£56.55**	**£85.20**	**£77.42**	**n/a**	**£610.89**

Source: Table 3 and Table 4

Table 9 - Future 2040 convenience goods expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2040	£75.75	£71.16	£73.77	£66.89	£50.80	£54.90	£56.46	£85.78	£76.87		**£612.36**
Zone 1 - Brooklands Centre, Byfleet	£17.13	£6.31	£1.23	£1.93	£2.85	£4.69	£1.93	£13.66	£27.82	£1.58	£79.13
Zone 1 - Weybridge Centre	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23
Zone 1 - Morrisons Weybridge	£10.61	£0.45	£0.39	£0.00	£0.67	£0.15	£0.19	£2.58	£0.00	£0.31	£15.34
Zone 1 - Waitrose Weybridge	£12.72	£0.39	£0.00	£0.00	£0.00	£0.00	£2.95	£3.18	£0.00	£0.39	£19.63
Zone 1 - Other	£6.75	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	£0.90	£0.00	£0.18	£9.20
Zone 2 - Aldi Walton	£0.87	£4.83	£1.06	£0.55	£1.39	£0.00	£0.50	£0.00	£0.00	£0.19	£9.39
Zone 2 - Walton Halfway	£0.07	£1.19	£0.56	£0.00	£1.41	£0.00	£0.00	£0.00	£0.00	£0.07	£3.30
Zone 2 - M&S Walton	£0.11	£3.65	£0.18	£0.16	£0.29	£0.00	£0.41	£0.00	£0.00	£0.10	£4.89
Zone 2 - Sainsbury's Walton	£2.09	£22.33	£4.40	£0.00	£2.70	£0.00	£2.64	£1.14	£0.13	£0.72	£36.13
Zone 2 - Other	£0.00	£6.34	£0.36	£0.34	£0.71	£0.00	£0.00	£0.61	£0.00	£0.17	£8.54
Zone 3 - Thames Ditton	£0.00	£0.00	£2.09	£0.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£2.20
Zone 3 - East Molesey	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.28
Zone 3 - West Molesey	£0.15	£0.00	£2.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£3.07
Zone 3 - Tesco Hurst Park	£0.00	£6.39	£30.47	£4.05	£1.89	£0.00	£0.66	£0.00	£0.00	£0.89	£44.34
Zone 3 - Tesco East Molesey	£0.00	£0.83	£5.61	£2.37	£0.00	£1.71	£0.00	£0.00	£0.00	£0.21	£10.73
Zone 4 - Hinchley Wood	£0.00	£0.00	£0.09	£1.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£1.40
Zone 4 - Claygate	£0.00	£0.00	£0.00	£10.90	£0.64	£0.00	£0.00	£0.00	£0.00	£0.24	£11.78
Zone 4 - Other	£0.00	£0.00	£1.82	£2.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£3.95
Zone 5 - Lidl Hersham	£1.52	£6.99	£1.90	£6.78	£7.89	£0.57	£0.28	£0.96	£0.00	£0.55	£27.45
Zone 5 - Hersham Centre	£1.13	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.03	£1.38
Zone 5 - Esher Centre	£0.00	£0.00	£0.00	£2.40	£1.54	£0.00	£0.00	£0.00	£0.00	£0.08	£4.02
Zone 5 - Waitrose Esher	£0.00	£0.00	£3.59	£12.94	£11.02	£0.14	£0.00	£0.00	£0.00	£0.57	£28.25
Zone 5 - Waitrose Hersham	£9.35	£3.20	£2.56	£1.44	£10.66	£0.93	£0.17	£0.24	£0.00	£0.58	£29.14
Zone 5 - Other	£0.00	£0.00	£0.00	£0.62	£0.95	£0.00	£0.00	£0.00	£0.00	£0.03	£1.60
Zone 6 - Oxshott	£0.00	£0.00	£0.00	£0.00	£0.00	£1.10	£0.00	£0.00	£0.00	£0.02	£1.12
Zone 6 - Cobham Centre	£0.00	£0.00	£0.00	£0.06	£1.38	£2.76	£0.00	£0.00	£0.00	£0.09	£4.28
Zone 6 - Sainsbury's Bridge Way	£2.51	£0.58	£0.85	£4.06	£2.20	£7.77	£0.00	£0.40	£3.04	£0.44	£21.84
Zone 6 - Waitrose Cobham	£5.47	£1.80	£0.00	£0.00	£0.20	£24.84	£0.00	£0.00	£1.33	£0.69	£34.32
Zone 6 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.01	£0.36
Elmbridge Borough Total	**£70.71**	**£65.27**	**£60.30**	**£51.99**	**£48.61**	**£45.03**	**£11.10**	**£23.67**	**£32.31**	**£8.35**	**£417.33**
Zone 7 - Shepperton	£0.00	£0.10	£0.00	£0.07	£0.00	£0.00	£10.41	£0.10	£0.00	n/a	£10.68
Zone 7 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	n/a	£0.68
											£0.00
Zone 8 - Chertsey Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.41	£19.66	£0.46	n/a	£24.53
Zone 8 - Addlestone Centre	£3.09	£1.44	£0.00	£0.00	£0.14	£0.84	£0.11	£27.13	£0.00	n/a	£32.76
Zone 8 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.21	£0.00	n/a	£6.21
											£0.00
Zone 9 - Byfleet	£0.11	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.10	£5.64	n/a	£5.92
Zone 9 - West Byfleet	£0.00	£0.15	£0.39	£0.00	£0.00	£0.00	£0.00	£1.58	£16.64	n/a	£18.75
Zone 9 - Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.10	£5.50	n/a	£6.03
Other study area total	**£3.21**	**£1.69**	**£0.39**	**£0.07**	**£0.20**	**£1.27**	**£15.62**	**£54.88**	**£28.24**	**£0.00**	**£105.56**
Ashford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	n/a	£0.44
Chessington	£0.00	£0.00	£0.00	£0.91	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.91
Epsom	£0.00	£0.00	£0.00	£0.00	£0.20	£0.94	£0.00	£0.00	£0.00	n/a	£1.14
Felton	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	n/a	£1.08
Guildford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.09	n/a	£5.09
Hampton/Hampton Hill	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	n/a	£0.79
Kingston-upon-Thames	£0.00	£0.00	£2.88	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£3.18
Leatherhead	£0.00	£0.00	£0.26	£0.79	£0.19	£7.66	£0.00	£0.00	£0.00	n/a	£8.90
New Malden	£0.00	£0.00	£1.48	£0.81	£1.14	£0.00	£0.00	£0.00	£0.00	n/a	£3.42
Staines	£1.61	£0.00	£0.00	£1.00	£0.00	£0.00	£4.74	£3.67	£1.50	n/a	£12.53
Sunbury-on-Thames	£0.00	£3.32	£1.28	£0.00	£0.00	£0.00	£23.15	£0.00	£0.00	n/a	£27.74
Surbiton	£0.00	£0.43	£6.00	£9.49	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£16.06
Tolworth	£0.00	£0.00	£0.06	£1.14	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.20
Woking	£0.00	£0.16	£0.00	£0.00	£0.31	£0.00	£0.00	£2.42	£9.26	n/a	£12.15
Elsewhere	£0.00	£0.29	£0.78	£0.39	£0.00	£0.00	£0.11	£1.14	£0.48	n/a	£3.19
TOTAL	**£75.75**	**£71.16**	**£73.77**	**£66.89**	**£50.80**	**£54.90**	**£56.46**	**£85.78**	**£76.87**	**n/a**	**£612.36**

Source: Table 3 and Table 4

Table 10 - Main food stores convenience goods sales floorspace and benchmark turnover

Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Aldi, Walton	973	80%	779	£14,548	£11.33
Budgens, Esher	253	95%	241	£7,634	£1.84
Budgens, Thames Ditton	56	95%	53	£7,634	£0.41
Lidl, Hersham	1,544	80%	1,235	£11,174	£13.80
Lidl. Weybridge	1,032	80%	826	£11,438	£9.45
M&S Foodhall, Brooklands	1,003	95%	953	£11,438	£10.90
M&S Foodhall, Walton	1,207	95%	1,146	£11,438	£13.11
M&S Simply Food (Bp), East Molesey	84	95%	79	£11,438	£0.91
M&S Simply Food (Services), Cobham	116	95%	110	£11,438	£1.26
Morrisons, Weybridge	3,433	80%	2,746	£12,721	£34.94
Morrisons Daily, Esher	129	95%	123	£12,721	£1.56
Sainsburys, Cobham	4,741	80%	3,792	£14,522	£55.07
Sainsburys, Walton	3,936	80%	3,149	£14,522	£45.73
Sainsburys Local, Cobham	380	95%	361	£14,522	£5.25
Sainsburys Local, West Molesey	206	95%	196	£14,522	£2.84
Sainsburys Local, Weybridge	142	95%	135	£14,522	£1.96
Tesco, Walton Road, East Molesey	712	90%	641	£14,511	£9.30
Tesco, Hurst Road, West Molesey	1,731	80%	1,385	£14,511	£20.09
Tesco Express, Esher	290	95%	276	£14,511	£4.00
Tesco Express, Hersham Road, Walton	281	95%	267	£14,511	£3.88
Tesco Express, Molesey Road, Walton	175	95%	166	£14,511	£2.41
Tesco Express, Queens Road, Weybridge	249	95%	236	£14,511	£3.43
Tesco Extra, Brooklands	6,017	70%	4,212	£14,511	£61.12
The Co-Operative, The Broadway, Esher	232	95%	220	£11,174	£2.46
The Co-Operative, Hare Lane, Esher	254	95%	241	£11,174	£2.69
The Co-Operative, Terrace Road, Walton	164	95%	156	£11,174	£1.74
Waitrose, Cobham	1,698	90%	1,528	£14,470	£22.11
Waitrose, Esher	1,181	90%	1,063	£14,470	£15.38
Waitrose, Hersham	1,755	90%	1,580	£14,470	£22.86
Waitrose, Weybridge	1,056	90%	950	£14,470	£13.75
Total	**35,030**		**28,846**		**£395.57**

Source: ORC Storepoint 2024 sales floorspace and Globaldata company average sales densities.

Table 11 - Summary of convenience goods expenditure 2024 to 2040 (£m)

	2024	2027	2030	2035	2040
Available expenditure					
Zone 1 - Weybridge/Brooklands	126.45	125.62	124.15	123.57	123.53
Zone 2 - Walton-on-Thames	62.88	62.22	61.90	61.88	62.26
Zone 3 - East Mlesey/Thames Ditton	61.39	60.73	60.35	60.28	60.63
Zone 4 - Claygate/Hinchley Wood	17.53	17.33	17.14	16.99	17.13
Zone 5 - Esher/Hersham	93.60	92.59	91.82	91.37	91.85
Zone 6 - Cobham/Oxshott	64.14	63.40	62.64	62.00	61.93
Total	**425.98**	**421.89**	**418.00**	**416.08**	**417.33**
Turnover of existing facilities					
Zone 1 - Weybridge/Brooklands	126.45	126.96	127.72	128.36	129.01
Zone 2 - Walton-on-Thames	62.88	63.13	63.51	63.83	64.15
Zone 3 - East Mlesey/Thames Ditton	61.39	61.64	62.01	62.32	62.63
Zone 4 - Claygate/Hinchley Wood	17.53	17.60	17.70	17.79	17.88
Zone 5 - Esher/Hersham	93.60	93.97	94.54	95.01	95.49
Zone 6 - Cobham/Oxshott	64.14	64.39	64.78	65.10	65.43
Total	**425.98**	**427.69**	**430.26**	**432.42**	**434.58**
Surplus/deficit expenditure					
Zone 1 - Weybridge/Brooklands	-	-1.34	-3.58	-4.80	-5.48
Zone 2 - Walton-on-Thames	-	-0.91	-1.60	-1.95	-1.89
Zone 3 - East Mlesey/Thames Ditton	-	-0.90	-1.66	-2.04	-2.00
Zone 4 - Claygate/Hinchley Wood	-	-0.27	-0.57	-0.80	-0.75
Zone 5 - Esher/Hersham	-	-1.39	-2.71	-3.64	-3.63
Zone 6 - Cobham/Oxshott	-	-0.99	-2.14	-3.10	-3.50
Total	**-**	**-5.80**	**-12.26**	**-16.33**	**-17.25**

Source: Tables 5 to 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 12 - Convenience goods floorspace capacity up to 2040 (cumulative)

	2024	2027	2030	2035	2040
Turnover density new floorspace (£ per sq m)	£12,000	£12,048	£12,120	£12,181	£12,242
Floorspace projection (sq m net)					
Zone 1 - Weybridge/Brooklands	0	-112	-295	-394	-447
Zone 2 - Walton-on-Thames	0	-75	-132	-160	-154
Zone 3 - East Mlesey/Thames Ditton	0	-75	-137	-167	-163
Zone 4 - Claygate/Hinchley Wood	0	-22	-47	-66	-61
Zone 5 - Esher/Hersham	0	-115	-224	-299	-297
Zone 6 - Cobham/Oxshott	0	-82	-177	-255	-286
Total	**0**	**-482**	**-1,012**	**-1,341**	**-1,409**
Floorspace projection (sq m gross)					
Zone 1 - Weybridge/Brooklands	0	-159	-422	-563	-639
Zone 2 - Walton-on-Thames	0	-108	-189	-229	-220
Zone 3 - East Mlesey/Thames Ditton	0	-107	-195	-239	-233
Zone 4 - Claygate/Hinchley Wood	0	-32	-67	-94	-88
Zone 5 - Esher/Hersham	0	-164	-320	-427	-424
Zone 6 - Cobham/Oxshott	0	-117	-252	-364	-409
Total	**0**	**-688**	**-1,445**	**-1,915**	**-2,013**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
Figures may not sum due to rounding

Appendix 4 Comparison Goods Assessment

Table 1 - Study area population projections

Zone	2024	2027	2030	2035	2040
1 - Weybridge	25,988	25,987	25,890	25,705	25,636
2 - Walton-on-Thames	27,016	27,011	27,046	27,111	27,273
3 - Molesey / Thames Ditton	27,217	27,213	27,209	27,264	27,370
4 - Claygate	23,204	23,178	23,021	22,823	22,981
5 - Esher / Hersham	18,445	18,439	18,403	18,373	18,425
6 - Cobham / Oxshott	18,887	18,833	18,710	18,501	18,412
7 - Shepperton	21,706	21,670	21,588	21,459	21,386
8 - Runnymede	33,494	33,838	34,150	34,565	34,738
9 - Byfleet	28,751	28,498	28,328	28,127	27,878
Total	**224,708**	**224,667**	**224,345**	**223,928**	**224,099**

Sources: Experian population projections 2024.

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	3,836	4,066	4,377	4,934	5,617
2 - Walton-on-Thames	3,241	3,435	3,698	4,169	4,746
3 - Molesey / Thames Ditton	3,417	3,622	3,899	4,396	5,004
4 - Claygate	3,790	4,017	4,324	4,875	5,550
5 - Esher / Hersham	3,530	3,742	4,028	4,541	5,169
6 - Cobham / Oxshott	3,956	4,193	4,514	5,089	5,793
7 - Shepperton	3,180	3,370	3,628	4,091	4,657
8 - Runnymede	2,965	3,142	3,383	3,814	4,342
9 - Byfleet	3,459	3,667	3,947	4,450	5,066

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£M)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	99.69	105.66	113.32	126.84	144.00
2 - Walton-on-Thames	87.56	92.79	100.02	113.03	129.44
3 - Molesey / Thames Ditton	93.00	98.57	106.10	119.86	136.97
4 - Claygate	87.94	93.10	99.55	111.27	127.54
5 - Esher / Hersham	65.11	68.99	74.13	83.43	95.24
6 - Cobham / Oxshott	74.72	78.97	84.46	94.16	106.67
7 - Shepperton	69.03	73.04	78.33	87.78	99.59
8 - Runnymede	99.31	106.34	115.53	131.83	150.82
9 - Byfleet	99.45	104.49	111.82	125.17	141.22
Total	**775.80**	**821.95**	**883.25**	**993.36**	**1,131.48**

Source: Tables 1 and 2

Table 4 - Base year 2024 comparison goods market shares by zone (%)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow
Zone 1 - Weybridge	23.3%	6.5%	2.2%	0.1%	2.0%	2.1%	1.9%	4.9%	1.1%	5.0%
Zone 1 - Brooklands Shopping Centre	9.1%	5.7%	1.5%	2.5%	4.3%	1.9%	3.6%	7.0%	16.5%	5.0%
Zone 1 - Weybridge Queens Road	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 1 - Other	7.9%	8.8%	1.3%	0.6%	7.4%	5.7%	0.9%	9.0%	8.5%	2.0%
Zone 2 - Walton-on-Thames	8.4%	30.7%	5.2%	1.0%	15.7%	2.6%	5.9%	4.8%	0.3%	5.0%
Zone 2 - Walton Terrace Road	0.0%	0.6%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 2 - Other	0.9%	1.7%	0.9%	0.0%	0.5%	0.2%	0.0%	0.0%	0.5%	2.0%
Zone 3 - East Molesey	0.1%	0.8%	5.5%	0.4%	2.2%	0.2%	0.1%	0.0%	0.0%	2.0%
Zone 3 - East Molesey Bridge Road	0.0%	0.0%	0.0%	0.3%	0.1%	0.1%	0.0%	0.0%	0.0%	2.0%
Zone 3 - Thames Ditton	0.0%	0.3%	2.6%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - Other	0.0%	0.4%	2.6%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Claygate	0.0%	0.0%	0.0%	1.9%	1.2%	0.3%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Hinchley Wood	0.0%	0.0%	0.1%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Other	0.0%	0.0%	0.6%	1.3%	0.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Esher	0.0%	0.8%	1.0%	2.1%	3.0%	0.0%	0.0%	0.0%	0.3%	2.0%
Zone 5 - Hersham	1.1%	0.4%	0.4%	2.0%	3.0%	0.2%	0.0%	0.4%	0.0%	2.0%
Zone 5 - Other	0.5%	0.4%	0.7%	0.2%	2.7%	0.1%	0.1%	0.1%	0.0%	2.0%
Zone 6 - Cobham	5.5%	1.3%	0.6%	1.1%	4.2%	33.1%	0.5%	0.0%	2.0%	5.0%
Zone 6 - Oxshott	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	2.0%
Elmbridge District total	**57.1%**	**58.4%**	**26.1%**	**14.6%**	**46.6%**	**48.7%**	**12.9%**	**26.4%**	**29.2%**	**n/a**
Zone 7 - Shepperton	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	n/a
Zone 7 - Other	0.1%	0.8%	0.8%	0.0%	0.2%	0.0%	1.1%	0.1%	0.0%	n/a
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Zone 8 - Addlestone	2.8%	1.8%	0.2%	1.7%	1.1%	0.2%	0.5%	13.1%	1.5%	n/a
Zone 8 - Chertsey	0.2%	0.9%	0.0%	0.0%	0.2%	0.0%	1.4%	3.5%	0.3%	n/a
Zone 8 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.2%	n/a
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Zone 9 - Byfleet	0.7%	0.0%	0.0%	0.0%	0.3%	1.9%	0.0%	0.7%	3.0%	n/a
Zone 9 - West Byfleet	0.1%	0.1%	0.0%	0.0%	0.8%	0.0%	0.8%	0.3%	3.3%	n/a
Zone 9 - Other	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	4.8%	n/a
Other study area total	**4.3%**	**3.9%**	**1.0%**	**1.8%**	**2.6%**	**2.3%**	**8.9%**	**18.3%**	**13.2%**	**n/a**
Central London	2.7%	0.3%	1.0%	0.3%	1.7%	8.2%	2.9%	0.7%	3.6%	n/a
Guildford	2.2%	0.7%	1.2%	0.7%	1.7%	2.7%	1.3%	2.0%	9.1%	n/a
Kingston upon Thames	19.8%	18.0%	51.3%	55.9%	31.3%	17.8%	19.9%	10.1%	5.7%	n/a
Staines	3.3%	7.5%	0.0%	0.0%	1.7%	0.3%	30.3%	19.5%	1.1%	n/a
Woking	2.0%	0.4%	0.0%	0.0%	1.0%	0.4%	0.0%	7.0%	24.9%	n/a
Elsewhere	8.6%	10.8%	19.3%	26.7%	13.4%	19.6%	23.8%	15.9%	13.3%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey August 2024 and Lichfields' analysis.

Table 5 - Base year 2024 comparison goods expenditure patterns (£ millions)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2024	99.69	87.56	93.00	87.94	65.11	74.72	69.03	99.31	99.45		775.80
Zone 1 - Weybridge	23.26	5.71	2.04	0.10	1.29	1.54	1.34	4.90	1.14	2.17	43.48
Zone 1 - Brooklands SC	9.07	5.00	1.39	2.24	2.78	1.45	2.48	6.96	16.38	2.51	50.26
Zone 1 - Weybridge Queens Rd	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.13
Zone 1 - Other	7.91	7.70	1.22	0.56	4.85	4.27	0.61	8.98	8.45	0.91	45.45
Zone 2 - Walton-on-Thames	8.38	26.86	4.88	0.90	10.20	1.95	4.07	4.82	0.29	3.28	65.63
Zone 2 - Walton Terrace Rd	0.00	0.55	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.03	1.26
Zone 2 - Other	0.92	1.52	0.87	0.00	0.35	0.13	0.00	0.01	0.52	0.09	4.42
Zone 3 - East Molesey	0.13	0.72	5.08	0.34	1.42	0.18	0.06	0.00	0.00	0.16	8.09
Zone 3 - East Molesey Bridge Rd	0.00	0.02	0.00	0.29	0.03	0.04	0.00	0.00	0.00	0.01	0.39
Zone 3 - Thames Ditton	0.00	0.25	2.46	0.16	0.04	0.00	0.00	0.00	0.00	0.06	2.97
Zone 3 - Other	0.04	0.34	2.40	0.11	0.07	0.00	0.00	0.00	0.00	0.06	3.02
Zone 4 - Claygate	0.00	0.00	0.00	1.70	0.79	0.26	0.00	0.00	0.00	0.06	2.81
Zone 4 - Hinchley Wood	0.04	0.00	0.12	0.54	0.05	0.00	0.00	0.00	0.00	0.02	0.77
Zone 4 - Other	0.00	0.00	0.56	1.17	0.06	0.00	0.00	0.01	0.00	0.04	1.84
Zone 5 - Esher	0.00	0.70	0.94	1.82	1.99	0.02	0.00	0.00	0.27	0.12	5.86
Zone 5 - Hersham	1.10	0.33	0.36	1.78	1.94	0.13	0.00	0.41	0.00	0.12	6.17
Zone 5 - Other	0.47	0.31	0.69	0.16	1.74	0.06	0.03	0.10	0.00	0.07	3.66
Zone 6 - Cobham	5.50	1.11	0.57	0.97	2.75	24.72	0.36	0.00	1.96	2.00	39.94
Zone 6 - Oxshott	0.00	0.00	0.00	0.00	0.00	1.39	0.00	0.00	0.00	0.03	1.42
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.00	0.01	0.27
Elmbridge District total	**56.92**	**51.12**	**24.27**	**12.86**	**30.36**	**36.42**	**8.94**	**26.23**	**29.01**	**11.74**	**287.85**
Zone 7 - Shepperton	0.02	0.23	0.00	0.00	0.00	0.00	3.40	0.01	0.00	n/a	3.67
Zone 7 - Other	0.15	0.68	0.74	0.00	0.14	0.01	0.78	0.14	0.00	n/a	2.65
Zone 8 - Addlestone	2.81	1.59	0.15	1.53	0.72	0.12	0.38	12.97	1.49	n/a	21.76
Zone 8 - Chertsey	0.15	0.81	0.00	0.00	0.10	0.00	0.97	3.48	0.34	n/a	5.86
Zone 8 - Other	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.24	n/a	0.78
Zone 9 - Byfleet	0.70	0.03	0.02	0.04	0.18	1.39	0.00	0.71	3.03	n/a	6.09
Zone 9 - West Byfleet	0.13	0.07	0.00	0.00	0.54	0.00	0.54	0.32	3.26	n/a	4.85
Zone 9 - Other	0.31	0.00	0.00	0.00	0.00	0.20	0.08	0.03	4.78	n/a	5.40
Other study area total	**4.29**	**3.42**	**0.91**	**1.57**	**1.67**	**1.73**	**6.16**	**18.18**	**13.14**	**n/a**	**51.05**
Central London	2.67	0.23	0.95	0.28	1.09	6.10	1.99	0.72	3.59	n/a	17.62
Guildford	2.22	0.64	1.16	0.63	1.12	2.02	0.88	2.01	9.04	n/a	19.72
Kingston upon Thames	19.74	15.77	47.74	49.13	20.40	13.29	13.75	10.02	5.68	n/a	195.53
Staines	3.33	6.57	0.00	0.00	1.10	0.23	20.91	19.41	1.09	n/a	52.64
Woking	1.97	0.36	0.00	0.00	0.68	0.29	0.00	6.95	24.72	n/a	34.97
Elsewhere	8.55	9.44	17.97	23.48	8.70	14.64	16.40	15.78	13.19	n/a	128.16
TOTAL	**99.69**	**87.56**	**93.00**	**87.94**	**65.11**	**74.72**	**69.03**	**99.31**	**99.45**	**n/a**	**787.54**

Source: Table 3 and 4.

Table 6 - Future 2027 comparison goods expenditure patterns (£ millions)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2027	105.66	92.79	98.57	93.10	68.99	78.97	73.04	106.34	104.49		821.95
Zone 1 - Weybridge	24.65	6.05	2.17	0.10	1.37	1.63	1.42	5.24	1.19	2.31	46.12
Zone 1 - Brooklands SC	9.61	5.30	1.47	2.37	2.94	1.54	2.62	7.45	17.21	2.66	53.18
Zone 1 - Weybridge Queens Rd	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.13
Zone 1 - Other	8.38	8.16	1.29	0.59	5.14	4.51	0.64	9.62	8.88	0.96	48.18
Zone 2 - Walton-on-Thames	8.88	28.46	5.17	0.95	10.81	2.06	4.31	5.16	0.31	3.48	69.59
Zone 2 - Walton Terrace Rd	0.00	0.59	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.03	1.33
Zone 2 - Other	0.97	1.61	0.92	0.00	0.37	0.14	0.00	0.01	0.55	0.09	4.68
Zone 3 - East Molesey	0.14	0.76	5.38	0.36	1.50	0.19	0.06	0.00	0.00	0.17	8.57
Zone 3 - East Molesey Bridge Rd	0.00	0.02	0.00	0.31	0.04	0.04	0.00	0.00	0.00	0.01	0.42
Zone 3 - Thames Ditton	0.00	0.26	2.61	0.17	0.04	0.00	0.00	0.00	0.00	0.06	3.15
Zone 3 - Other	0.05	0.36	2.55	0.12	0.07	0.00	0.00	0.00	0.00	0.06	3.21
Zone 4 - Claygate	0.00	0.00	0.00	1.80	0.84	0.28	0.00	0.00	0.00	0.06	2.98
Zone 4 - Hinchley Wood	0.05	0.00	0.13	0.58	0.05	0.00	0.00	0.00	0.00	0.02	0.82
Zone 4 - Other	0.00	0.00	0.59	1.24	0.06	0.00	0.00	0.01	0.00	0.04	1.95
Zone 5 - Esher	0.00	0.74	1.00	1.93	2.10	0.03	0.00	0.00	0.28	0.12	6.21
Zone 5 - Hersham	1.17	0.35	0.38	1.88	2.06	0.14	0.00	0.44	0.00	0.13	6.54
Zone 5 - Other	0.50	0.33	0.73	0.17	1.84	0.07	0.04	0.11	0.00	0.08	3.88
Zone 6 - Cobham	5.83	1.18	0.61	1.03	2.92	26.13	0.38	0.00	2.05	2.11	42.23
Zone 6 - Oxshott	0.00	0.00	0.00	0.00	0.00	1.47	0.00	0.00	0.00	0.03	1.50
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.00	0.00	0.01	0.28
Elmbridge District total	**60.33**	**54.18**	**25.72**	**13.61**	**32.17**	**38.49**	**9.46**	**28.08**	**30.48**	**12.43**	**304.95**
Zone 7 - Shepperton	0.02	0.25	0.00	0.00	0.00	0.00	3.60	0.01	0.00	n/a	3.88
Zone 7 - Other	0.16	0.73	0.79	0.00	0.15	0.01	0.83	0.15	0.00	n/a	2.81
Zone 8 - Addlestone	2.98	1.69	0.15	1.62	0.76	0.13	0.40	13.89	1.57	n/a	23.18
Zone 8 - Chertsey	0.16	0.86	0.00	0.00	0.11	0.00	1.03	3.72	0.36	n/a	6.24
Zone 8 - Other	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.25	n/a	0.83
Zone 9 - Byfleet	0.75	0.03	0.02	0.04	0.19	1.47	0.00	0.76	3.18	n/a	6.43
Zone 9 - West Byfleet	0.14	0.07	0.00	0.00	0.57	0.00	0.57	0.34	3.42	n/a	5.11
Zone 9 - Other	0.33	0.00	0.00	0.00	0.00	0.22	0.08	0.04	5.02	n/a	5.68
Other study area total	**4.54**	**3.62**	**0.96**	**1.66**	**1.77**	**1.83**	**6.51**	**19.47**	**13.80**	**n/a**	**54.17**
Central London	2.83	0.24	1.01	0.29	1.15	6.44	2.10	0.78	3.77	n/a	18.63
Guildford	2.35	0.68	1.23	0.66	1.19	2.14	0.93	2.15	9.50	n/a	20.83
Kingston upon Thames	20.93	16.71	50.60	52.01	21.61	14.05	14.55	10.73	5.96	n/a	207.16
Staines	3.53	6.97	0.00	0.00	1.16	0.24	22.12	20.79	1.15	n/a	55.96
Woking	2.09	0.38	0.00	0.00	0.72	0.31	0.00	7.45	25.97	n/a	36.91
Elsewhere	9.06	10.01	19.05	24.86	9.22	15.47	17.36	16.90	13.86	n/a	135.78
TOTAL	**105.66**	**92.79**	**98.57**	**93.10**	**68.99**	**78.97**	**73.04**	**106.34**	**104.49**	**n/a**	**834.38**

Source: Table 3 and 4.

Table 7 - Future 2030 comparison goods expenditure patterns (£ millions)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2030	113.32	100.02	106.10	99.55	74.13	84.46	78.33	115.53	111.82		883.25
Zone 1 - Weybridge	26.44	6.52	2.33	0.11	1.47	1.74	1.52	5.69	1.28	2.48	49.58
Zone 1 - Brooklands SC	10.31	5.72	1.58	2.54	3.16	1.64	2.81	8.10	18.42	2.86	57.13
Zone 1 - Weybridge Queens Rd	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.14
Zone 1 - Other	8.99	8.80	1.39	0.63	5.52	4.83	0.69	10.45	9.51	1.04	51.83
Zone 2 - Walton-on-Thames	9.52	30.68	5.56	1.02	11.62	2.20	4.62	5.60	0.33	3.75	74.91
Zone 2 - Walton Terrace Rd	0.00	0.63	0.77	0.00	0.00	0.00	0.00	0.00	0.00	0.03	1.43
Zone 2 - Other	1.04	1.74	0.99	0.00	0.40	0.15	0.00	0.01	0.59	0.10	5.03
Zone 3 - East Molesey	0.15	0.82	5.79	0.39	1.62	0.20	0.06	0.00	0.00	0.18	9.22
Zone 3 - East Molesey Bridge Rd	0.00	0.02	0.00	0.33	0.04	0.05	0.00	0.00	0.00	0.01	0.45
Zone 3 - Thames Ditton	0.00	0.28	2.81	0.18	0.05	0.00	0.00	0.00	0.00	0.07	3.39
Zone 3 - Other	0.05	0.38	2.74	0.13	0.08	0.00	0.00	0.00	0.00	0.07	3.45
Zone 4 - Claygate	0.00	0.00	0.00	1.93	0.90	0.30	0.00	0.00	0.00	0.06	3.19
Zone 4 - Hinchley Wood	0.05	0.00	0.14	0.61	0.05	0.00	0.00	0.00	0.00	0.02	0.88
Zone 4 - Other	0.00	0.00	0.64	1.33	0.07	0.00	0.00	0.01	0.00	0.04	2.09
Zone 5 - Esher	0.00	0.80	1.08	2.06	2.26	0.03	0.00	0.00	0.30	0.13	6.66
Zone 5 - Hersham	1.25	0.37	0.41	2.01	2.21	0.15	0.00	0.48	0.00	0.14	7.03
Zone 5 - Other	0.54	0.35	0.79	0.19	1.98	0.07	0.04	0.12	0.00	0.08	4.17
Zone 6 - Cobham	6.25	1.27	0.65	1.10	3.13	27.95	0.40	0.00	2.20	2.26	45.21
Zone 6 - Oxshott	0.00	0.00	0.00	0.00	0.00	1.58	0.00	0.00	0.00	0.03	1.61
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.00	0.01	0.30
Elmbridge District total	**64.70**	**58.40**	**27.69**	**14.56**	**34.56**	**41.17**	**10.14**	**30.51**	**32.62**	**13.36**	**327.69**
Zone 7 - Shepperton	0.02	0.27	0.00	0.00	0.00	0.00	3.86	0.01	0.00	n/a	4.17
Zone 7 - Other	0.17	0.78	0.85	0.00	0.16	0.01	0.89	0.16	0.00	n/a	3.02
Zone 8 - Addlestone	3.19	1.82	0.17	1.73	0.81	0.14	0.43	15.09	1.68	n/a	25.06
Zone 8 - Chertsey	0.17	0.93	0.00	0.00	0.11	0.00	1.10	4.04	0.39	n/a	6.75
Zone 8 - Other	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.61	0.27	n/a	0.90
Zone 9 - Byfleet	0.80	0.03	0.02	0.04	0.20	1.57	0.00	0.83	3.40	n/a	6.90
Zone 9 - West Byfleet	0.15	0.08	0.00	0.00	0.62	0.00	0.61	0.37	3.66	n/a	5.48
Zone 9 - Other	0.35	0.00	0.00	0.00	0.00	0.23	0.09	0.04	5.37	n/a	6.08
Other study area total	**4.87**	**3.91**	**1.03**	**1.77**	**1.90**	**1.95**	**6.99**	**21.15**	**14.77**	**n/a**	**58.35**
Central London	3.03	0.26	1.09	0.31	1.24	6.89	2.25	0.84	4.04	n/a	19.96
Guildford	2.52	0.74	1.32	0.71	1.27	2.29	1.00	2.34	10.17	n/a	22.35
Kingston upon Thames	22.44	18.01	54.47	55.62	23.22	15.03	15.61	11.66	6.38	n/a	222.43
Staines	3.79	7.51	0.00	0.00	1.25	0.25	23.73	22.58	1.23	n/a	60.34
Woking	2.24	0.41	0.00	0.00	0.77	0.33	0.00	8.09	27.79	n/a	39.63
Elsewhere	9.72	10.79	20.51	26.58	9.91	16.55	18.62	18.36	14.83	n/a	145.85
TOTAL	**113.32**	**100.02**	**106.10**	**99.55**	**74.13**	**84.46**	**78.33**	**115.53**	**111.82**	**n/a**	**896.61**

Source: Table 3 and 4.

Table 8 - Future 2035 comparison goods expenditure patterns (£ millions)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2035	126.84	113.03	119.86	111.27	83.43	94.16	87.78	131.83	125.17		993.36
Zone 1 - Weybridge	29.60	7.37	2.63	0.12	1.66	1.94	1.70	6.50	1.43	2.79	55.73
Zone 1 - Brooklands SC	11.54	6.46	1.79	2.84	3.56	1.83	3.15	9.24	20.61	3.21	64.23
Zone 1 - Weybridge Queens Rd	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.16
Zone 1 - Other	10.06	9.94	1.57	0.70	6.21	5.38	0.77	11.92	10.64	1.17	58.37
Zone 2 - Walton-on-Thames	10.66	34.67	6.28	1.14	13.08	2.46	5.18	6.39	0.37	4.22	84.45
Zone 2 - Walton Terrace Rd	0.00	0.72	0.87	0.00	0.00	0.00	0.00	0.00	0.00	0.03	1.62
Zone 2 - Other	1.17	1.97	1.12	0.00	0.45	0.16	0.00	0.02	0.66	0.11	5.66
Zone 3 - East Molesey	0.17	0.93	6.54	0.43	1.82	0.22	0.07	0.00	0.00	0.21	10.40
Zone 3 - East Molesey Bridge Rd	0.00	0.03	0.00	0.37	0.04	0.05	0.00	0.00	0.00	0.01	0.50
Zone 3 - Thames Ditton	0.00	0.32	3.17	0.20	0.05	0.00	0.00	0.00	0.00	0.08	3.83
Zone 3 - Other	0.06	0.43	3.10	0.14	0.09	0.00	0.00	0.00	0.00	0.08	3.89
Zone 4 - Claygate	0.00	0.00	0.00	2.15	1.02	0.33	0.00	0.00	0.00	0.07	3.57
Zone 4 - Hinchley Wood	0.06	0.00	0.16	0.69	0.06	0.00	0.00	0.00	0.00	0.02	0.98
Zone 4 - Other	0.00	0.00	0.72	1.48	0.08	0.00	0.00	0.02	0.00	0.05	2.34
Zone 5 - Esher	0.00	0.90	1.22	2.30	2.54	0.03	0.00	0.00	0.34	0.15	7.49
Zone 5 - Hersham	1.40	0.42	0.46	2.25	2.49	0.16	0.00	0.54	0.00	0.16	7.89
Zone 5 - Other	0.60	0.40	0.89	0.21	2.23	0.08	0.04	0.14	0.00	0.09	4.69
Zone 6 - Cobham	7.00	1.43	0.74	1.23	3.53	31.16	0.45	0.00	2.46	2.53	50.52
Zone 6 - Oxshott	0.00	0.00	0.00	0.00	0.00	1.76	0.00	0.00	0.00	0.04	1.79
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.33	0.00	0.00	0.00	0.01	0.34
Elmbridge District total	**72.42**	**65.99**	**31.28**	**16.27**	**38.90**	**45.90**	**11.36**	**34.81**	**36.51**	**15.02**	**368.46**
Zone 7 - Shepperton	0.02	0.30	0.00	0.00	0.00	0.00	4.33	0.02	0.00	n/a	4.67
Zone 7 - Other	0.19	0.88	0.96	0.00	0.18	0.01	1.00	0.18	0.00	n/a	3.40
Zone 8 - Addlestone	3.58	2.05	0.19	1.94	0.92	0.15	0.48	17.22	1.88	n/a	28.40
Zone 8 - Chertsey	0.19	1.05	0.00	0.00	0.13	0.00	1.24	4.62	0.43	n/a	7.65
Zone 8 - Other	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.69	0.30	n/a	1.02
Zone 9 - Byfleet	0.89	0.04	0.02	0.05	0.22	1.75	0.00	0.94	3.81	n/a	7.73
Zone 9 - West Byfleet	0.16	0.09	0.00	0.00	0.69	0.00	0.68	0.42	4.10	n/a	6.15
Zone 9 - Other	0.39	0.00	0.00	0.00	0.00	0.26	0.10	0.05	6.01	n/a	6.81
Other study area total	**5.46**	**4.41**	**1.17**	**1.98**	**2.14**	**2.18**	**7.83**	**24.13**	**16.53**	**n/a**	**65.84**
Central London	3.40	0.30	1.23	0.35	1.40	7.68	2.53	0.96	4.52	n/a	22.36
Guildford	2.82	0.83	1.49	0.79	1.43	2.55	1.12	2.67	11.38	n/a	25.09
Kingston upon Thames	25.12	20.36	61.53	62.16	26.14	16.75	17.49	13.30	7.14	n/a	249.99
Staines	4.24	8.49	0.00	0.00	1.40	0.28	26.59	25.77	1.38	n/a	68.15
Woking	2.51	0.46	0.00	0.00	0.87	0.37	0.00	9.23	31.11	n/a	44.54
Elsewhere	10.87	12.19	23.16	29.71	11.15	18.45	20.86	20.95	16.60	n/a	163.95
TOTAL	**126.84**	**113.03**	**119.86**	**111.27**	**83.43**	**94.16**	**87.78**	**131.83**	**125.17**	**n/a**	**1008.38**

Source: Table 3 and 4.

Table 9 - Future 2040 comparison goods expenditure patterns (£ millions)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2040	144.00	129.44	136.97	127.54	95.24	106.67	99.59	150.82	141.22		1131.48
Zone 1 - Weybridge	33.60	8.43	3.01	0.14	1.89	2.20	1.93	7.43	1.61	3.17	63.43
Zone 1 - Brooklands SC	13.10	7.40	2.04	3.25	4.06	2.07	3.57	10.57	23.26	3.65	72.98
Zone 1 - Weybridge Queens Rd	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.18
Zone 1 - Other	11.42	11.39	1.80	0.81	7.09	6.10	0.87	13.64	12.01	1.33	66.45
Zone 2 - Walton-on-Thames	12.10	39.71	7.18	1.31	14.93	2.78	5.87	7.31	0.42	4.82	96.43
Zone 2 - Walton Terrace Rd	0.00	0.82	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	1.85
Zone 2 - Other	1.33	2.25	1.28	0.00	0.52	0.18	0.00	0.02	0.74	0.13	6.45
Zone 3 - East Molesey	0.19	1.07	7.48	0.50	2.08	0.25	0.08	0.00	0.00	0.24	11.88
Zone 3 - East Molesey Bridge Rd	0.00	0.03	0.00	0.43	0.05	0.06	0.00	0.00	0.00	0.01	0.57
Zone 3 - Thames Ditton	0.00	0.37	3.63	0.23	0.06	0.00	0.00	0.00	0.00	0.09	4.38
Zone 3 - Other	0.06	0.50	3.54	0.17	0.10	0.00	0.00	0.00	0.00	0.09	4.45
Zone 4 - Claygate	0.00	0.00	0.00	2.47	1.16	0.37	0.00	0.00	0.00	0.08	4.08
Zone 4 - Hinchley Wood	0.06	0.00	0.18	0.79	0.07	0.00	0.00	0.00	0.00	0.02	1.12
Zone 4 - Other	0.00	0.00	0.82	1.70	0.09	0.00	0.00	0.02	0.00	0.05	2.68
Zone 5 - Esher	0.00	1.03	1.39	2.64	2.90	0.03	0.00	0.00	0.38	0.17	8.56
Zone 5 - Hersham	1.59	0.48	0.53	2.58	2.84	0.18	0.00	0.62	0.00	0.18	9.01
Zone 5 - Other	0.69	0.46	1.02	0.24	2.55	0.09	0.05	0.16	0.00	0.11	5.35
Zone 6 - Cobham	7.94	1.64	0.84	1.41	4.03	35.30	0.51	0.00	2.78	2.87	57.31
Zone 6 - Oxshott	0.00	0.00	0.00	0.00	0.00	1.99	0.00	0.00	0.00	0.04	2.03
Zone 6 - Other	0.00	0.00	0.00	0.00	0.00	0.38	0.00	0.00	0.00	0.01	0.38
Elmbridge District total	**82.22**	**75.57**	**35.74**	**18.65**	**44.41**	**51.99**	**12.89**	**39.83**	**41.19**	**17.10**	**419.59**
Zone 7 - Shepperton	0.03	0.35	0.00	0.00	0.00	0.00	4.91	0.02	0.00	n/a	5.30
Zone 7 - Other	0.21	1.01	1.09	0.00	0.21	0.02	1.13	0.21	0.00	n/a	3.88
Zone 8 - Addlestone	4.06	2.35	0.21	2.22	1.05	0.17	0.55	19.70	2.12	n/a	32.43
Zone 8 - Chertsey	0.22	1.20	0.00	0.00	0.15	0.00	1.40	5.28	0.49	n/a	8.74
Zone 8 - Other	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.34	n/a	1.16
Zone 9 - Byfleet	1.02	0.04	0.03	0.05	0.26	1.99	0.00	1.08	4.30	n/a	8.76
Zone 9 - West Byfleet	0.19	0.10	0.00	0.00	0.79	0.00	0.78	0.48	4.62	n/a	6.96
Zone 9 - Other	0.44	0.00	0.00	0.00	0.00	0.29	0.11	0.05	6.78	n/a	7.68
Other study area total	**6.19**	**5.06**	**1.33**	**2.27**	**2.45**	**2.47**	**8.88**	**27.61**	**18.65**	**n/a**	**74.91**
Central London	3.85	0.34	1.41	0.40	1.59	8.70	2.87	1.10	5.10	n/a	25.36
Guildford	3.20	0.95	1.71	0.91	1.64	2.89	1.27	3.05	12.84	n/a	28.46
Kingston upon Thames	28.52	23.31	70.31	71.25	29.84	18.98	19.84	15.22	8.06	n/a	285.33
Staines	4.82	9.72	0.00	0.00	1.60	0.32	30.16	29.48	1.55	n/a	77.66
Woking	2.85	0.53	0.00	0.00	0.99	0.42	0.00	10.56	35.10	n/a	50.44
Elsewhere	12.35	13.96	26.47	34.05	12.73	20.90	23.67	23.97	18.73	n/a	186.82
TOTAL	**144.00**	**129.44**	**136.97**	**127.54**	**95.24**	**106.67**	**99.59**	**150.82**	**141.22**	**n/a**	**1148.58**

Source: Table 3 and 4.

Table 10 - Summary of comparison goods expenditure 2024 to 2040 (£m)

	2024	2027	2030	2035	2040
Available expenditure					
Zone 1 - Weybridge/Brooklands	139.33	147.61	158.69	178.50	203.04
Zone 2 - Walton-on-Thames	71.30	75.60	81.37	91.73	104.74
Zone 3 - East Molesey/Thames Ditton	14.48	15.35	16.51	18.63	21.28
Zone 4 - Claygate/Hinchley Wood	5.42	5.74	6.15	6.89	7.89
Zone 5 - Esher/Hersham	15.69	16.62	17.85	20.07	22.92
Zone 6 - Cobham/Oxshott	41.63	44.02	47.13	52.65	59.73
Total	**287.85**	**304.95**	**327.69**	**368.46**	**419.59**
Turnover of existing facilities					
Zone 1 - Weybridge/Brooklands	139.33	148.86	160.78	182.80	207.83
Zone 2 - Walton-on-Thames	71.30	76.19	82.28	93.55	106.36
Zone 3 - East Molesey/Thames Ditton	14.48	15.48	16.71	19.00	21.60
Zone 4 - Claygate/Hinchley Wood	5.42	5.80	6.26	7.12	8.09
Zone 5 - Esher/Hersham	15.69	16.76	18.11	20.58	23.40
Zone 6 - Cobham/Oxshott	41.63	44.48	48.04	54.61	62.09
Total	**287.85**	**307.56**	**332.18**	**377.67**	**429.38**
Surplus/deficit expenditure					
Zone 1 - Weybridge/Brooklands	-	-1.25	-2.09	-4.30	-4.79
Zone 2 - Walton-on-Thames	-	-0.59	-0.92	-1.82	-1.63
Zone 3 - East Molesey/Thames Ditton	-	-0.13	-0.20	-0.38	-0.32
Zone 4 - Claygate/Hinchley Wood	-	-0.05	-0.11	-0.22	-0.20
Zone 5 - Esher/Hersham	-	-0.14	-0.25	-0.52	-0.48
Zone 6 - Cobham/Oxshott	-	-0.46	-0.91	-1.97	-2.37
Total	**-**	**-2.61**	**-4.49**	**-9.21**	**-9.79**

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b

Table 11 - Comparison goods floorspace capacity up to 2040 (cumulative)

	2024	2027	2030	2035	2040
Turnover density new floorspace (£ per sq m)	£6,000	£6,411	£6,924	£7,872	£8,950
Floorspace projection (sq m net)					
Zone 1 - Weybridge/Brooklands	0	-195	-302	-546	-536
Zone 2 - Walton-on-Thames	0	-92	-132	-231	-182
Zone 3 - East Molesey/Thames Ditton	0	-20	-29	-48	-36
Zone 4 - Claygate/Hinchley Wood	0	-8	-15	-28	-23
Zone 5 - Esher/Hersham	0	-22	-37	-66	-54
Zone 6 - Cobham/Oxshott	0	-72	-132	-250	-265
Total	**0**	**-408**	**-648**	**-1,169**	**-1,094**
Floorspace projection (sq m gross)					
Zone 1 - Weybridge/Brooklands	0	-278	-432	-781	-765
Zone 2 - Walton-on-Thames	0	-131	-189	-330	-260
Zone 3 - East Molesey/Thames Ditton	0	-28	-42	-69	-51
Zone 4 - Claygate/Hinchley Wood	0	-12	-22	-40	-32
Zone 5 - Esher/Hersham	0	-31	-52	-94	-77
Zone 6 - Cobham/Oxshott	0	-103	-188	-357	-378
Total	**0**	**-583**	**-925**	**-1,671**	**-1,563**

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Figure 4b
Figures may not sum due to rounding

Appendix 5 Food/Beverage Assessment

Table 1 - Study area population projections

Zone	2024	2027	2030	2035	2040
1 - Weybridge	25,988	25,987	25,890	25,705	25,636
2 - Walton-on-Thames	27,016	27,011	27,046	27,111	27,273
3 - Molesey / Thames Ditton	27,217	27,213	27,209	27,264	27,370
4 - Claygate	23,204	23,178	23,021	22,823	22,981
5 - Esher / Hersham	18,445	18,439	18,403	18,373	18,425
6 - Cobham / Oxshott	18,887	18,833	18,710	18,501	18,412
7 - Shepperton	21,706	21,670	21,588	21,459	21,386
8 - Runnymede	33,494	33,838	34,150	34,565	34,738
9 - Byfleet	28,751	28,498	28,328	28,127	27,878
Total	**224,708**	**224,667**	**224,345**	**223,928**	**224,099**

Sources: Experian population projections 2024.

Table 2 - Food and beverage expenditure per person per annum (£)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	2,649	2,723	2,814	2,929	3,048
2 - Walton-on-Thames	2,242	2,305	2,382	2,479	2,580
3 - Molesey / Thames Ditton	2,362	2,429	2,510	2,612	2,718
4 - Claygate	2,533	2,604	2,691	2,800	2,914
5 - Esher / Hersham	2,381	2,448	2,530	2,633	2,740
6 - Cobham / Oxshott	2,518	2,589	2,676	2,784	2,898
7 - Shepperton	1,974	2,030	2,097	2,183	2,271
8 - Runnymede	1,936	1,991	2,058	2,141	2,228
9 - Byfleet	2,093	2,152	2,224	2,315	2,409

Sources:
Experian Local Expenditure 2022 (2022 prices)
Experian growth rates - Retail Planner Briefing Note 21 (February 2024)

Table 3 - Total food and beverarge expenditure (£M)

Zone	2024	2027	2030	2035	2040
1 - Weybridge	68.84	70.77	72.86	75.28	78.13
2 - Walton-on-Thames	60.57	62.27	64.43	67.21	70.36
3 - Molesey / Thames Ditton	64.29	66.09	68.29	71.21	74.39
4 - Claygate	58.78	60.36	61.95	63.91	66.97
5 - Esher / Hersham	43.92	45.14	46.56	48.37	50.48
6 - Cobham / Oxshott	47.56	48.76	50.06	51.52	53.35
7 - Shepperton	42.85	43.98	45.28	46.84	48.58
8 - Runnymede	64.84	67.37	70.26	74.01	77.40
9 - Byfleet	60.18	61.34	63.00	65.10	67.15
Total	**511.82**	**526.09**	**542.69**	**563.44**	**586.80**

Source: Tables 1 and 2

Table 4 - Base year 2024 food and beverage market shares by zone (%)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow Byfleet
Zone 1 - Weybridge	41.9%	5.4%	1.9%	1.2%	2.3%	3.9%	5.0%	12.5%	7.1%	5.0%
Zone 1 - Other	0.0%	0.9%	0.1%	0.0%	0.0%	0.2%	0.0%	0.4%	0.7%	2.0%
Zone 2 - Walton-on-Thames	2.4%	56.8%	4.6%	0.0%	16.1%	0.4%	2.4%	3.2%	5.2%	5.0%
Zone 2 - Walton Halfway	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 2 - Other	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - East Molesey	0.2%	0.0%	10.5%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	2.0%
Zone 3 - East Molesey Bridge Rd	0.0%	2.4%	14.2%	1.2%	0.0%	0.4%	0.0%	0.0%	0.0%	2.0%
Zone 3 - Thames Ditton	0.0%	1.1%	16.1%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 3 - Other	1.1%	0.0%	0.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Claygate	0.2%	0.0%	0.0%	15.8%	1.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Hinchley Wood	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Long Ditton	0.0%	0.0%	0.9%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 4 - Other	0.0%	0.1%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Zone 5 - Esher	5.4%	6.7%	3.6%	30.1%	39.6%	4.0%	3.5%	0.7%	0.0%	2.0%
Zone 5 - Hersham	1.7%	1.4%	0.4%	0.4%	5.1%	0.0%	0.5%	0.4%	0.0%	2.0%
Zone 5 - Other	0.0%	0.0%	0.1%	0.3%	0.4%	0.4%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Cobham	17.7%	3.9%	0.0%	3.5%	13.6%	58.4%	5.3%	4.1%	4.5%	5.0%
Zone 6 - Oxshott	0.0%	0.0%	0.0%	0.4%	0.0%	6.5%	0.0%	0.1%	2.7%	2.0%
Zone 6 - Stoke D'Abernon	0.7%	0.3%	0.0%	0.4%	0.0%	5.2%	0.0%	0.0%	0.0%	2.0%
Zone 6 - Other	0.0%	0.0%	0.0%	0.0%	1.7%	1.2%	0.0%	0.0%	0.5%	2.0%
Elmbridge District total	**71.8%**	**79.1%**	**53.0%**	**63.4%**	**81.9%**	**80.7%**	**16.8%**	**21.5%**	**20.6%**	**n/a**
Zone 7 - Shepperton	0.6%	2.6%	0.0%	0.0%	0.2%	0.0%	31.0%	0.5%	0.0%	n/a
Zone 7 - Other	0.6%	0.3%	0.4%	0.0%	0.4%	0.0%	4.4%	1.4%	0.0%	n/a
Zone 8 - Addlestone	0.0%	3.1%	0.4%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	n/a
Zone 8 - Chertsey	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	2.3%	14.9%	1.3%	n/a
Zone 8 - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.2%	n/a
Zone 9 - Byfleet	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	8.8%	n/a
Zone 9 - West Byfleet	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	13.5%	n/a
Zone 9 - Ripley	1.5%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.4%	9.0%	
Zone 9 - Other	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	n/a
Other study area total	**3.9%**	**6.3%**	**1.0%**	**0.0%**	**0.6%**	**0.2%**	**37.8%**	**35.7%**	**33.6%**	**n/a**
Central London	3.8%	2.5%	3.3%	10.2%	4.0%	9.9%	5.2%	7.2%	8.2%	n/a
Guildford	3.2%	0.0%	0.0%	0.4%	0.4%	0.4%	0.5%	6.0%	10.8%	n/a
Kingston upon Thames	4.2%	1.0%	21.3%	7.2%	0.0%	0.0%	3.9%	0.0%	0.0%	n/a
Staines	0.0%	3.3%	0.0%	0.6%	0.0%	0.0%	17.1%	2.9%	2.7%	n/a
Surbiton	0.0%	0.0%	0.1%	11.4%	1.1%	0.0%	0.0%	1.4%	0.0%	n/a
Woking	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	3.0%	2.3%	n/a
Elsewhere	8.7%	7.7%	21.3%	6.8%	11.9%	8.9%	18.6%	22.3%	21.8%	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**n/a**

Source: NEMS Household Survey August 2024 and Lichfields' analysis.

Table 5 - Base year 2024 food and beverage expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2024	68.84	60.57	64.29	58.78	43.92	47.56	42.85	64.84	60.18		**511.82**
Zone 1 - Weybridge	28.87	3.29	1.23	0.71	1.02	1.87	2.16	8.14	4.26	2.71	54.25
Zone 1 - Other	0.00	0.52	0.08	0.00	0.00	0.07	0.00	0.24	0.40	0.03	1.33
Zone 2 - Walton-on-Thames	1.67	34.42	2.94	0.00	7.09	0.17	1.05	2.08	3.13	2.77	55.32
Zone 2 - Walton Halfway	0.00	0.00	0.00	0.00	0.92	0.00	0.00	0.00	0.00	0.02	0.94
Zone 2 - Other	0.38	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.45
Zone 3 - East Molesey	0.11	0.00	6.72	0.00	0.00	0.17	0.00	0.00	0.00	0.14	7.15
Zone 3 - East Molesey Bridge Rd	0.00	1.43	9.13	0.71	0.00	0.17	0.00	0.00	0.00	0.23	11.67
Zone 3 - Thames Ditton	0.00	0.66	10.36	2.17	0.00	0.00	0.00	0.00	0.00	0.27	13.47
Zone 3 - Other	0.72	0.00	0.25	0.43	0.00	0.00	0.00	0.00	0.00	0.03	1.44
Zone 4 - Claygate	0.11	0.00	0.00	9.29	0.43	0.00	0.00	0.00	0.00	0.20	10.04
Zone 4 - Hinchley Wood	0.00	0.00	0.00	1.43	0.00	0.00	0.00	0.00	0.00	0.03	1.45
Zone 4 - Long Ditton	0.00	0.00	0.58	1.69	0.00	0.00	0.00	0.00	0.00	0.05	2.31
Zone 4 - Other	0.00	0.07	0.08	0.27	0.00	0.00	0.00	0.00	0.00	0.01	0.42
Zone 5 - Esher	3.74	4.07	2.34	17.72	17.37	1.89	1.52	0.48	0.00	1.00	50.13
Zone 5 - Hersham	1.14	0.83	0.29	0.21	2.25	0.00	0.20	0.24	0.00	0.11	5.26
Zone 5 - Other	0.00	0.00	0.08	0.21	0.17	0.17	0.00	0.00	0.00	0.01	0.63
Zone 6 - Cobham	12.18	2.37	0.00	2.04	5.98	27.76	2.26	2.64	2.70	3.05	60.96
Zone 6 - Oxshott	0.00	0.00	0.00	0.21	0.00	3.07	0.00	0.09	1.63	0.10	5.10
Zone 6 - Stoke D'Abernon	0.49	0.19	0.00	0.21	0.00	2.48	0.00	0.00	0.00	0.07	3.44
Zone 6 - Other	0.00	0.00	0.00	0.00	0.76	0.56	0.00	0.00	0.29	0.03	1.64
Elmbridge District total	**49.42**	**47.91**	**34.07**	**37.29**	**35.98**	**38.38**	**7.18**	**13.91**	**12.41**	**10.86**	**287.42**
Zone 7 - Shepperton	0.39	1.55	0.00	0.00	0.10	0.00	13.30	0.33	0.00	n/a	15.67
Zone 7 - Other	0.38	0.19	0.29	0.00	0.17	0.00	1.88	0.92	0.00	n/a	3.83
Zone 8 - Addlestone	0.00	1.90	0.29	0.00	0.00	0.00	0.00	5.84	0.00	n/a	8.03
Zone 8 - Chertsey	0.00	0.00	0.08	0.00	0.00	0.00	0.99	9.69	0.78	n/a	11.54
Zone 8 - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.53	0.09	n/a	3.62
Zone 9 - Byfleet	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.57	5.31	n/a	6.26
Zone 9 - West Byfleet	0.00	0.19	0.00	0.00	0.00	0.00	0.00	2.03	8.10	n/a	10.32
Zone 9 - Ripley	1.02	0.00	0.00	0.00	0.00	0.07	0.00	0.24	5.39	n/a	6.73
Zone 9 - Other	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	n/a	1.11
Other study area total	**2.70**	**3.84**	**0.65**	**0.00**	**0.27**	**0.07**	**16.18**	**23.17**	**20.24**	**n/a**	**67.12**
Central London	2.64	1.52	2.13	5.98	1.76	4.71	2.24	4.70	4.93	n/a	30.60
Guildford	2.19	0.00	0.00	0.21	0.17	0.17	0.20	3.86	6.47	n/a	13.27
Kingston upon Thames	2.92	0.59	13.68	4.23	0.00	0.00	1.67	0.00	0.00	n/a	23.09
Staines	0.00	2.02	0.00	0.36	0.00	0.00	7.32	1.89	1.63	n/a	13.22
Surbiton	0.00	0.00	0.08	6.73	0.50	0.00	0.00	0.90	0.00	n/a	8.21
Woking	2.96	0.00	0.00	0.00	0.00	0.00	0.07	1.97	1.38	n/a	6.38
Elsewhere	6.01	4.69	13.68	3.99	5.24	4.22	7.99	14.44	13.11	n/a	73.37
TOTAL	**68.84**	**60.57**	**64.29**	**58.78**	**43.92**	**47.56**	**42.85**	**64.84**	**60.18**	**n/a**	**522.68**

Source: Tables 3 and 4

Table 6 - Future 2027 food and beverage expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2027	70.77	62.27	66.09	60.36	45.14	48.76	43.98	67.37	61.34		**526.09**
Zone 1 - Weybridge	29.68	3.38	1.27	0.73	1.05	1.92	2.21	8.45	4.34	2.79	55.82
Zone 1 - Other	0.00	0.53	0.08	0.00	0.00	0.07	0.00	0.25	0.41	0.03	1.36
Zone 2 - Walton-on-Thames	1.72	35.38	3.02	0.00	7.29	0.17	1.08	2.16	3.19	2.84	56.86
Zone 2 - Walton Halfway	0.00	0.00	0.00	0.00	0.95	0.00	0.00	0.00	0.00	0.02	0.96
Zone 2 - Other	0.39	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.47
Zone 3 - East Molesey	0.12	0.00	6.91	0.00	0.00	0.17	0.00	0.00	0.00	0.15	7.35
Zone 3 - East Molesey Bridge Rd	0.00	1.47	9.38	0.73	0.00	0.17	0.00	0.00	0.00	0.24	12.00
Zone 3 - Thames Ditton	0.00	0.68	10.65	2.23	0.00	0.00	0.00	0.00	0.00	0.28	13.84
Zone 3 - Other	0.74	0.00	0.26	0.44	0.00	0.00	0.00	0.00	0.00	0.03	1.48
Zone 4 - Claygate	0.12	0.00	0.00	9.54	0.45	0.00	0.00	0.00	0.00	0.21	10.31
Zone 4 - Hinchley Wood	0.00	0.00	0.00	1.46	0.00	0.00	0.00	0.00	0.00	0.03	1.49
Zone 4 - Long Ditton	0.00	0.00	0.59	1.74	0.00	0.00	0.00	0.00	0.00	0.05	2.38
Zone 4 - Other	0.00	0.07	0.08	0.27	0.00	0.00	0.00	0.00	0.00	0.01	0.43
Zone 5 - Esher	3.85	4.18	2.40	18.20	17.86	1.94	1.56	0.50	0.00	1.03	51.51
Zone 5 - Hersham	1.17	0.85	0.30	0.21	2.31	0.00	0.21	0.25	0.00	0.11	5.41
Zone 5 - Other	0.00	0.00	0.08	0.21	0.17	0.17	0.00	0.00	0.00	0.01	0.65
Zone 6 - Cobham	12.52	2.43	0.00	2.10	6.14	28.46	2.32	2.74	2.75	3.13	62.59
Zone 6 - Oxshott	0.00	0.00	0.00	0.21	0.00	3.15	0.00	0.09	1.66	0.10	5.22
Zone 6 - Stoke D'Abernon	0.50	0.20	0.00	0.21	0.00	2.55	0.00	0.00	0.00	0.07	3.53
Zone 6 - Other	0.00	0.00	0.00	0.00	0.78	0.57	0.00	0.00	0.30	0.03	1.68
Elmbridge District total	**50.80**	**49.25**	**35.03**	**38.30**	**36.99**	**39.36**	**7.37**	**14.45**	**12.65**	**11.17**	**295.36**
Zone 7 - Shepperton	0.40	1.60	0.00	0.00	0.10	0.00	13.66	0.34	0.00	n/a	16.09
Zone 7 - Other	0.39	0.20	0.30	0.00	0.17	0.00	1.93	0.96	0.00	n/a	3.95
Zone 8 - Addlestone	0.00	1.95	0.30	0.00	0.00	0.00	0.00	6.07	0.00	n/a	8.32
Zone 8 - Chertsey	0.00	0.00	0.08	0.00	0.00	0.00	1.02	10.07	0.79	n/a	11.96
Zone 8 - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.67	0.09	n/a	3.76
Zone 9 - Byfleet	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.59	5.41	n/a	6.40
Zone 9 - West Byfleet	0.00	0.20	0.00	0.00	0.00	0.00	0.00	2.11	8.25	n/a	10.56
Zone 9 - Ripley	1.05	0.00	0.00	0.00	0.00	0.07	0.00	0.25	5.49	n/a	6.87
Zone 9 - Other	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	n/a	1.13
Other study area total	**2.78**	**3.94**	**0.67**	**0.00**	**0.27**	**0.07**	**16.61**	**24.07**	**20.63**	**n/a**	**69.05**
Central London	2.71	1.56	2.19	6.14	1.80	4.83	2.29	4.88	5.03	n/a	31.44
Guildford	2.25	0.00	0.00	0.21	0.17	0.17	0.21	4.01	6.60	n/a	13.63
Kingston upon Thames	3.01	0.61	14.06	4.34	0.00	0.00	1.71	0.00	0.00	n/a	23.73
Staines	0.00	2.08	0.00	0.37	0.00	0.00	7.51	1.96	1.66	n/a	13.59
Surbiton	0.00	0.00	0.08	6.91	0.52	0.00	0.00	0.94	0.00	n/a	8.44
Woking	3.04	0.00	0.00	0.00	0.00	0.00	0.07	2.05	1.41	n/a	6.57
Elsewhere	6.18	4.82	14.06	4.09	5.39	4.33	8.20	15.01	13.36	n/a	75.44
TOTAL	**70.77**	**62.27**	**66.09**	**60.36**	**45.14**	**48.76**	**43.98**	**67.37**	**61.34**	**n/a**	**537.26**

Source: Tables 3 and 4

Table 7 - Future 2030 food and beverage expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2030	72.86	64.43	68.29	61.95	46.56	50.06	45.28	70.26	63.00		**542.69**
Zone 1 - Weybridge	30.56	3.50	1.31	0.75	1.08	1.97	2.28	8.82	4.46	2.88	57.59
Zone 1 - Other	0.00	0.55	0.08	0.00	0.00	0.08	0.00	0.26	0.42	0.03	1.41
Zone 2 - Walton-on-Thames	1.77	36.61	3.13	0.00	7.51	0.18	1.11	2.26	3.28	2.94	58.78
Zone 2 - Walton Halfway	0.00	0.00	0.00	0.00	0.98	0.00	0.00	0.00	0.00	0.02	0.99
Zone 2 - Other	0.40	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.48
Zone 3 - East Molesey	0.12	0.00	7.14	0.00	0.00	0.18	0.00	0.00	0.00	0.15	7.59
Zone 3 - East Molesey Bridge Rd	0.00	1.52	9.69	0.75	0.00	0.18	0.00	0.00	0.00	0.25	12.39
Zone 3 - Thames Ditton	0.00	0.70	11.01	2.29	0.00	0.00	0.00	0.00	0.00	0.29	14.29
Zone 3 - Other	0.77	0.00	0.27	0.45	0.00	0.00	0.00	0.00	0.00	0.03	1.52
Zone 4 - Claygate	0.12	0.00	0.00	9.80	0.46	0.00	0.00	0.00	0.00	0.21	10.59
Zone 4 - Hinchley Wood	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.03	1.53
Zone 4 - Long Ditton	0.00	0.00	0.61	1.78	0.00	0.00	0.00	0.00	0.00	0.05	2.44
Zone 4 - Other	0.00	0.07	0.08	0.28	0.00	0.00	0.00	0.00	0.00	0.01	0.44
Zone 5 - Esher	3.96	4.33	2.48	18.68	18.42	1.99	1.60	0.52	0.00	1.06	53.04
Zone 5 - Hersham	1.20	0.88	0.31	0.22	2.38	0.00	0.22	0.26	0.00	0.11	5.58
Zone 5 - Other	0.00	0.00	0.08	0.22	0.18	0.18	0.00	0.00	0.00	0.01	0.67
Zone 6 - Cobham	12.89	2.52	0.00	2.15	6.33	29.22	2.38	2.86	2.82	3.22	64.41
Zone 6 - Oxshott	0.00	0.00	0.00	0.22	0.00	3.23	0.00	0.10	1.71	0.11	5.37
Zone 6 - Stoke D'Abernon	0.52	0.20	0.00	0.22	0.00	2.61	0.00	0.00	0.00	0.07	3.63
Zone 6 - Other	0.00	0.00	0.00	0.00	0.81	0.58	0.00	0.00	0.31	0.03	1.73
Elmbridge District total	**52.30**	**50.96**	**36.19**	**39.31**	**38.15**	**40.41**	**7.59**	**15.07**	**12.99**	**11.51**	**304.48**
Zone 7 - Shepperton	0.41	1.65	0.00	0.00	0.10	0.00	14.06	0.36	0.00	n/a	16.58
Zone 7 - Other	0.40	0.20	0.31	0.00	0.18	0.00	1.99	1.00	0.00	n/a	4.08
Zone 8 - Addlestone	0.00	2.02	0.31	0.00	0.00	0.00	0.00	6.33	0.00	n/a	8.66
Zone 8 - Chertsey	0.00	0.00	0.08	0.00	0.00	0.00	1.05	10.50	0.82	n/a	12.45
Zone 8 - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.83	0.10	n/a	3.92
Zone 9 - Byfleet	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.62	5.56	n/a	6.58
Zone 9 - West Byfleet	0.00	0.20	0.00	0.00	0.00	0.00	0.00	2.20	8.48	n/a	10.89
Zone 9 - Ripley	1.08	0.00	0.00	0.00	0.00	0.08	0.00	0.26	5.64	n/a	7.06
Zone 9 - Other	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	n/a	1.16
Other study area total	**2.86**	**4.08**	**0.69**	**0.00**	**0.28**	**0.08**	**17.10**	**25.10**	**21.19**	**n/a**	**71.39**
Central London	2.79	1.61	2.27	6.30	1.86	4.95	2.36	5.09	5.16	n/a	32.41
Guildford	2.31	0.00	0.00	0.22	0.18	0.18	0.22	4.19	6.78	n/a	14.07
Kingston upon Thames	3.10	0.63	14.53	4.45	0.00	0.00	1.77	0.00	0.00	n/a	24.48
Staines	0.00	2.15	0.00	0.38	0.00	0.00	7.73	2.05	1.71	n/a	14.02
Surbiton	0.00	0.00	0.08	7.09	0.53	0.00	0.00	0.98	0.00	n/a	8.68
Woking	3.13	0.00	0.00	0.00	0.00	0.00	0.08	2.14	1.45	n/a	6.79
Elsewhere	6.36	4.99	14.53	4.20	5.56	4.45	8.44	15.65	13.72	n/a	77.90
TOTAL	**72.86**	**64.43**	**68.29**	**61.95**	**46.56**	**50.06**	**45.28**	**70.26**	**63.00**	**n/a**	**554.21**

Source: Tables 3 and 4

Table 8 - Future 2035 food and beverage expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2035	75.28	67.21	71.21	63.91	48.37	51.52	46.84	74.01	65.10		**563.44**
Zone 1 - Weybridge	31.57	3.65	1.36	0.77	1.12	2.03	2.36	9.28	4.60	2.99	59.74
Zone 1 - Other	0.00	0.57	0.08	0.00	0.00	0.08	0.00	0.27	0.43	0.03	1.47
Zone 2 - Walton-on-Thames	1.83	38.19	3.26	0.00	7.81	0.18	1.15	2.38	3.39	3.06	61.24
Zone 2 - Walton Halfway	0.00	0.00	0.00	0.00	1.01	0.00	0.00	0.00	0.00	0.02	1.03
Zone 2 - Other	0.41	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.50
Zone 3 - East Molesey	0.12	0.00	7.45	0.00	0.00	0.18	0.00	0.00	0.00	0.16	7.91
Zone 3 - East Molesey Bridge Rd	0.00	1.58	10.11	0.77	0.00	0.18	0.00	0.00	0.00	0.26	12.91
Zone 3 - Thames Ditton	0.00	0.74	11.48	2.36	0.00	0.00	0.00	0.00	0.00	0.30	14.87
Zone 3 - Other	0.79	0.00	0.28	0.47	0.00	0.00	0.00	0.00	0.00	0.03	1.57
Zone 4 - Claygate	0.12	0.00	0.00	10.11	0.48	0.00	0.00	0.00	0.00	0.22	10.93
Zone 4 - Hinchley Wood	0.00	0.00	0.00	1.55	0.00	0.00	0.00	0.00	0.00	0.03	1.58
Zone 4 - Long Ditton	0.00	0.00	0.64	1.84	0.00	0.00	0.00	0.00	0.00	0.05	2.53
Zone 4 - Other	0.00	0.07	0.08	0.29	0.00	0.00	0.00	0.00	0.00	0.01	0.46
Zone 5 - Esher	4.09	4.52	2.59	19.27	19.13	2.05	1.66	0.55	0.00	1.10	54.95
Zone 5 - Hersham	1.24	0.92	0.32	0.22	2.47	0.00	0.22	0.27	0.00	0.12	5.80
Zone 5 - Other	0.00	0.00	0.08	0.22	0.19	0.18	0.00	0.00	0.00	0.01	0.69
Zone 6 - Cobham	13.32	2.63	0.00	2.22	6.58	30.07	2.47	3.01	2.92	3.33	66.54
Zone 6 - Oxshott	0.00	0.00	0.00	0.22	0.00	3.33	0.00	0.10	1.77	0.11	5.53
Zone 6 - Stoke D'Abernon	0.54	0.21	0.00	0.22	0.00	2.69	0.00	0.00	0.00	0.07	3.74
Zone 6 - Other	0.00	0.00	0.00	0.00	0.84	0.60	0.00	0.00	0.32	0.04	1.79
Elmbridge District total	**54.04**	**53.16**	**37.74**	**40.55**	**39.63**	**41.58**	**7.85**	**15.88**	**13.42**	**11.94**	**315.79**
Zone 7 - Shepperton	0.42	1.72	0.00	0.00	0.11	0.00	14.54	0.38	0.00	n/a	17.17
Zone 7 - Other	0.41	0.21	0.32	0.00	0.19	0.00	2.06	1.05	0.00	n/a	4.24
Zone 8 - Addlestone	0.00	2.11	0.32	0.00	0.00	0.00	0.00	6.67	0.00	n/a	9.10
Zone 8 - Chertsey	0.00	0.00	0.08	0.00	0.00	0.00	1.09	11.06	0.84	n/a	13.08
Zone 8 - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.03	0.10	n/a	4.13
Zone 9 - Byfleet	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.65	5.74	n/a	6.81
Zone 9 - West Byfleet	0.00	0.21	0.00	0.00	0.00	0.00	0.00	2.32	8.76	n/a	11.29
Zone 9 - Ripley	1.12	0.00	0.00	0.00	0.00	0.08	0.00	0.27	5.83	n/a	7.30
Zone 9 - Other	0.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	n/a	1.20
Other study area total	**2.96**	**4.26**	**0.72**	**0.00**	**0.29**	**0.08**	**17.69**	**26.44**	**21.90**	**n/a**	**74.33**
Central London	2.89	1.68	2.36	6.50	1.93	5.10	2.44	5.37	5.34	n/a	33.61
Guildford	2.39	0.00	0.00	0.22	0.19	0.18	0.22	4.41	7.00	n/a	14.62
Kingston upon Thames	3.20	0.66	15.15	4.59	0.00	0.00	1.83	0.00	0.00	n/a	25.43
Staines	0.00	2.25	0.00	0.39	0.00	0.00	8.00	2.15	1.77	n/a	14.56
Surbiton	0.00	0.00	0.08	7.32	0.55	0.00	0.00	1.03	0.00	n/a	8.98
Woking	3.23	0.00	0.00	0.00	0.00	0.00	0.08	2.25	1.49	n/a	7.06
Elsewhere	6.57	5.21	15.15	4.33	5.77	4.58	8.73	16.48	14.18	n/a	81.00
TOTAL	**75.28**	**67.21**	**71.21**	**63.91**	**48.37**	**51.52**	**46.84**	**74.01**	**65.10**	**n/a**	**575.38**

Source: Tables 3 and 4

Table 9 - Future 2040 food and beverage expenditure patterns by zone (£M)

	1 Weybridge	2 Walton-on-Thames	3 Molesey / Thames Ditton	4 Claygate	5 Esher / Hersham	6 Cobham / Oxshott	7 Shepperton	8 Runnymede	9 Byfleet	Inflow	Total
Expenditure 2040	78.13	70.36	74.39	66.97	50.48	53.35	48.58	77.40	67.15		**586.80**
Zone 1 - Weybridge	32.77	3.82	1.42	0.81	1.17	2.10	2.45	9.71	4.75	3.11	62.10
Zone 1 - Other	0.00	0.60	0.09	0.00	0.00	0.08	0.00	0.29	0.44	0.03	1.53
Zone 2 - Walton-on-Thames	1.90	39.98	3.40	0.00	8.15	0.19	1.19	2.48	3.50	3.20	63.99
Zone 2 - Walton Halfway	0.00	0.00	0.00	0.00	1.06	0.00	0.00	0.00	0.00	0.02	1.08
Zone 2 - Other	0.43	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.52
Zone 3 - East Molesey	0.13	0.00	7.78	0.00	0.00	0.19	0.00	0.00	0.00	0.17	8.26
Zone 3 - East Molesey Bridge Rd	0.00	1.66	10.56	0.81	0.00	0.19	0.00	0.00	0.00	0.27	13.49
Zone 3 - Thames Ditton	0.00	0.77	11.99	2.48	0.00	0.00	0.00	0.00	0.00	0.31	15.55
Zone 3 - Other	0.82	0.00	0.29	0.49	0.00	0.00	0.00	0.00	0.00	0.03	1.64
Zone 4 - Claygate	0.13	0.00	0.00	10.59	0.50	0.00	0.00	0.00	0.00	0.23	11.45
Zone 4 - Hinchley Wood	0.00	0.00	0.00	1.62	0.00	0.00	0.00	0.00	0.00	0.03	1.66
Zone 4 - Long Ditton	0.00	0.00	0.67	1.93	0.00	0.00	0.00	0.00	0.00	0.05	2.65
Zone 4 - Other	0.00	0.08	0.09	0.30	0.00	0.00	0.00	0.00	0.00	0.01	0.48
Zone 5 - Esher	4.25	4.73	2.70	20.19	19.97	2.12	1.72	0.57	0.00	1.15	57.40
Zone 5 - Hersham	1.29	0.96	0.33	0.24	2.58	0.00	0.23	0.29	0.00	0.12	6.05
Zone 5 - Other	0.00	0.00	0.09	0.23	0.19	0.19	0.00	0.00	0.00	0.01	0.72
Zone 6 - Cobham	13.82	2.75	0.00	2.33	6.87	31.14	2.56	3.15	3.01	3.45	69.08
Zone 6 - Oxshott	0.00	0.00	0.00	0.24	0.00	3.45	0.00	0.11	1.82	0.11	5.72
Zone 6 - Stoke D'Abernon	0.56	0.22	0.00	0.24	0.00	2.79	0.00	0.00	0.00	0.08	3.88
Zone 6 - Other	0.00	0.00	0.00	0.00	0.87	0.62	0.00	0.00	0.33	0.04	1.86
Elmbridge District total	**56.09**	**55.65**	**39.42**	**42.49**	**41.36**	**43.06**	**8.14**	**16.60**	**13.85**	**12.44**	**329.10**
Zone 7 - Shepperton	0.44	1.80	0.00	0.00	0.11	0.00	15.08	0.40	0.00	n/a	17.83
Zone 7 - Other	0.43	0.22	0.33	0.00	0.19	0.00	2.14	1.10	0.00	n/a	4.42
Zone 8 - Addlestone	0.00	2.20	0.33	0.00	0.00	0.00	0.00	6.98	0.00	n/a	9.51
Zone 8 - Chertsey	0.00	0.00	0.09	0.00	0.00	0.00	1.13	11.57	0.87	n/a	13.65
Zone 8 - Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.21	0.10	n/a	4.32
Zone 9 - Byfleet	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.68	5.93	n/a	7.04
Zone 9 - West Byfleet	0.00	0.22	0.00	0.00	0.00	0.00	0.00	2.43	9.03	n/a	11.69
Zone 9 - Ripley	1.16	0.00	0.00	0.00	0.00	0.08	0.00	0.29	6.01	n/a	7.54
Zone 9 - Other	0.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	n/a	1.24
Other study area total	**3.07**	**4.46**	**0.76**	**0.00**	**0.31**	**0.08**	**18.34**	**27.65**	**22.59**	**n/a**	**77.25**
Central London	3.00	1.76	2.47	6.81	2.02	5.28	2.53	5.61	5.50	n/a	34.98
Guildford	2.48	0.00	0.00	0.24	0.19	0.19	0.23	4.61	7.22	n/a	15.17
Kingston upon Thames	3.32	0.69	15.83	4.81	0.00	0.00	1.89	0.00	0.00	n/a	26.55
Staines	0.00	2.35	0.00	0.41	0.00	0.00	8.30	2.25	1.82	n/a	15.13
Surbiton	0.00	0.00	0.09	7.67	0.58	0.00	0.00	1.07	0.00	n/a	9.41
Woking	3.36	0.00	0.00	0.00	0.00	0.00	0.08	2.36	1.54	n/a	7.33
Elsewhere	6.82	5.45	15.82	4.54	6.02	4.74	9.05	17.24	14.63	n/a	84.32
TOTAL	**78.13**	**70.36**	**74.39**	**66.97**	**50.48**	**53.35**	**48.58**	**77.40**	**67.15**	**n/a**	**599.24**

Source: Tables 3 and 4

Table 10 - Summary of food and beverage expenditure 2024 to 2040 (£m)

	2024	2027	2030	2035	2040
Available expenditure					
Zone 1 - Weybridge/Brooklands	55.58	57.18	59.00	61.21	63.63
Zone 2 - Walton-on-Thames	56.71	58.29	60.26	62.77	65.58
Zone 3 - East Molesey/Thames Ditton	33.72	34.66	35.79	37.27	38.94
Zone 4 - Claygate/Hinchley Wood	14.23	14.61	15.01	15.49	16.23
Zone 5 - Esher/Hersham	56.02	57.57	59.29	61.44	64.17
Zone 6 - Cobham/Oxshott	71.15	73.03	75.13	77.60	80.55
Total	**287.42**	**295.36**	**304.48**	**315.79**	**329.10**
Turnover of existing facilities					
Zone 1 - Weybridge/Brooklands	55.58	56.14	56.99	57.56	58.14
Zone 2 - Walton-on-Thames	56.71	57.28	58.14	58.73	59.32
Zone 3 - East Molesey/Thames Ditton	33.72	34.06	34.57	34.92	35.27
Zone 4 - Claygate/Hinchley Wood	14.23	14.37	14.59	14.73	14.88
Zone 5 - Esher/Hersham	56.02	56.59	57.44	58.02	58.60
Zone 6 - Cobham/Oxshott	71.15	71.86	72.95	73.68	74.42
Total	**287.42**	**290.30**	**294.68**	**297.64**	**300.62**
Surplus/deficit expenditure					
Zone 1 - Weybridge/Brooklands	-	1.04	2.02	3.65	5.50
Zone 2 - Walton-on-Thames	-	1.01	2.11	4.04	6.27
Zone 3 - East Molesey/Thames Ditton	-	0.60	1.22	2.35	3.67
Zone 4 - Claygate/Hinchley Wood	-	0.24	0.42	0.76	1.35
Zone 5 - Esher/Hersham	-	0.99	1.85	3.43	5.57
Zone 6 - Cobham/Oxshott	-	1.17	2.18	3.92	6.13
Total	**-**	**5.06**	**9.80**	**18.15**	**28.47**

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2

Table 11 - Food and beverage floorspace capacity up to 2040 (cumulative)

	2024	2027	2030	2035	2040
Turnover density new floorspace (£ per sq m)	£6,000	£6,060	£6,097	£6,158	£6,220
Floorspace projection (sq m gross)					
Zone 1 - Weybridge/Brooklands	0	172	331	593	884
Zone 2 - Walton-on-Thames	0	167	346	657	1,007
Zone 3 - East Molesey/Thames Ditton	0	100	199	381	590
Zone 4 - Claygate/Hinchley Wood	0	40	69	123	217
Zone 5 - Esher/Hersham	0	163	304	557	896
Zone 6 - Cobham/Oxshott	0	193	358	637	985
Total	**0**	**835**	**1,607**	**2,948**	**4,578**

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 21 - Leisure Figure 2
Figures may not sum due to rounding

Birmingham
0121 713 1530
birmingham@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk

@LichfieldsUK

lichfields.uk