Tandridge Retail and Leisure Study Update

Final Report

Tandridge District Council

19 April 2018

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1.0 Introduction

Background

1.1 Lichfields was commissioned by Tandridge District Council to prepare the Tandridge Retail and Leisure Study published in September 2015 (TRLS 2015). The objectives of TRLS 2015 were to provide a robust and credible evidence base to inform the Council's development plan. The TRLS 2015 provided:

1. a qualitative analysis of the existing retail and leisure facilities within Tandridge District's town and local centres, identification of the role of each centre, catchment areas and the relationship between the centres; and
2. a quantitative and qualitative assessment of the need for new retail facilities within Tandridge District, and the need for leisure and other main town centre uses. This assessment will examine the need for both food and non-food retailing including a qualitative analysis for different forms of facilities such as retail warehousing, local shops, large food stores and traditional high street comparison shopping.
3. the future need and (residual) capacity for retail, food and beverage and leisure floorspace distributed by the main centres for the period up to 2033;
4. the potential implications of emerging developments both within and outside the District, in terms of impact on town centres and potential changes to shopping patterns;
5. the existing retail hierarchy and network of centres and advises whether any changes are required;
6. development plan policies, allocations and recommendations on how each centre can develop its role.

1.2 This report provides a partial update of the TRLS 2015, and should be read alongside the previous study. This report updates the District wide retail and leisure capacity projections and need assessment, including:

1. update population projections based on the Office of National Statistics (ONS) latest 2014 based projections, housing deliver targets and higher growth scenario based on the updated Assessment of Objectively Assessed Housing Need (OAN) based on the revised standard methodology published on 9 March 2018 as draft planning practice guidance;
2. Experian's local expenditure data (the latest 2016 data, which was issued in December 2017, will be obtained) for the six study area zones;
3. Experian's latest (December 2017) expenditure growth projections and home shopping projections;
4. revised retail sales floorspace for mainstream food stores in the District based on the latest StorePoint database;
5. benchmark turnover estimates for existing and proposed food store floorspace based on the latest Global Data information 2017;
6. Experian's latest growth forecast for special forms of trading and growth in turnover efficiencies;
7. an update on pipeline retail developments;
8. a review of the Council’s emerging town centres assessment; and

9 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met.

2.0 The Shopping Hierarchy

Introduction

2.1 This section provides an updated overview of the shopping hierarchy in Tandridge District and the surrounding sub-region. It updated Section 2.0 of the TRLS 2015.

Centres in Tandridge and the Surrounding Area

2.2 Tandridge District is bounded by Bromley, Crawley, Croydon, Reigate and Banstead, Mid-Sussex, Wealden and Sevenoaks. The District contains two designated town centres and a number of large and smaller villages. Caterham Valley and Oxted are the principal town centres. Caterham Hill, Lingfield, Warlingham and Whyteleafe are local centres catering for local needs. In addition to these centres designated in the development plan there are small village centres at Godstone and Smallfield and other local shopping facilities.

2.3 The Council's adopted Core Strategy (2008) sets out policies on retail and town centres, which seeks to protect and enhance the two main town centre's Caterham Valley and Oxted to maintain their role as local service centres providing services for the local population, particularly day to day needs. The core strategy recognises these two centres fall within the regional catchment area of Croydon and Crawley. Redhill and East Grinstead are also identified as key centres outside the District.

2.4 Javelin's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. The results for the town centre destinations and other relevant centres outside the District are shown in Table 2.1 overleaf.

2.5 Table 2.1 indicates that there have been no significant changes in the retail hierarchy since 2014. Most centres have increased their Venuescore since 2014, but the relative position between centres remains broadly unchanged. Kingston upon Thames, Croydon and Bromley remain at the top of the hierarchy, with Tunbridge Wells, Crawley and Sutton at the next tier. Caterham and Oxted are the main centres in Tandridge District, but remain mid to lower tier centres in the wider hierarchy. Residents in Tandridge District have good access to a number of larger centres, as well as having a choice of smaller centres more locally to meet their day to day shopping needs.

2.6 Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 2.1. This information is weighted towards clothing and fashion retailing.

2.7 The market position relates specifically to the fashion offer together with other easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations.

2.8 The sub-region has a number of "Upper Middle" centres, which reflects high levels of affluence in this area. These centres offer a higher proportion of luxury/high quality retailing. The Javelin analysis of centres suggests centres within the sub-region have a good provision of quality clothes/fashion shops, including independent shops and multiples. Most other centres, including Caterham and Oxted, have "Middle" market positions. This suggests Caterham and Oxted have a reasonable mix of fashion outlets catering for both the discount and mid-market sectors, but do not offer the higher quality fashion outlets. In overall terms the larger centres tend to have a stronger provision of luxury/high quality retailing than the smaller centres.

Table 2.1 Javelin's Venuescore UK Shopping Index and UK Rank 2017

Centre	Venuescore 2014	Venuescore 2017	Venuescore Change	UK Rank 2017	Market Position
Kingston Upon Thames	367	382	+ 15	18	Upper Middle
Croydon	306	328	+ 22	23	Middle
Bromley	274	286	+ 12	38	Upper Middle
Tunbridge Wells	233	232	- 1	55	Upper Middle
Crawley	200	204	+ 4	77	Middle
Sutton	189	199	+ 10	82	Middle
Epsom	130	142	+ 12	163	Middle
Purley Way North	104	116	+ 12	209	Middle
Redhill	97	101	+ 4	250	Middle
Orpington	84	90	+ 6	300	Lower Middle
Dorking	68	90	+ 22	300	Upper Middle
Tonbridge	77	82	+ 5	332	Middle
East Grinstead	89	80	- 9	343	Middle
Sevenoaks	68	79	+ 11	350	Upper Middle
Reigate	66	68	+ 2	416	Upper Middle
Gatwick Airport South	48	56	+ 8	537	Upscale
Caterham	49	52	+ 3	579	Middle
Gatwick Airport North	51	48	- 3	633	Upscale
West Wickham	43	46	+ 3	666	Middle
Wallington	36	43	+ 7	710	Middle
Banstead	29	35	+ 6	912	Upper Middle
Purley	20	32	+ 12	1008	Middle
Horley	30	32	+ 2	1008	Middle
Oxted	20	27	+ 7	1187	Middle
Coulsdon	17	26	+ 9	1233	Middle
Selsdon	15	18	+ 3	1696	Lower Middle
Biggin Hill	13	17	+ 4	1775	Middle
New Addington	14	17	+ 3	1775	n/a
Sanderstead	10	11	+ 1	2815	Upper Middle

2.9 In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:

1 age focus (is the offer targeting younger or older consumers?); and

2 fashionability of its offer (is the clothing offer traditional or progressive?).

2.10 The Javelin Group classifies retailers in terms of their "fashionability" ranging from "traditional" at one end, then "updated classic", "fashion moderate", "fashion forward" through to "progressive" at the other, i.e. least fashionable to the most fashionable. Shopping destinations in London dominate the most "progressive" venues, such as Carnaby Street and Bond Street.

2.11 The age positon of the fashion offer is also classified ranging from "young", "middle" to "old", for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and others such as Evans and Edinburgh Woollen Mill appealing to older people. The results for the main centres within the sub-region are shown in Table 2.2 overleaf.

Table 2.2 Javelin's Venuescore Fashion Attributes 2017

Centre	Age	Fashion Position
Kingston Upon Thames	Mid	Fashion Moderate
Croydon	Old	Fashion Moderate
Bromley	Mid	Fashion Moderate
Tunbridge Wells	Old	Updated Classic
Crawley	Mid	Fashion Moderate
Sutton	Mid	Fashion Moderate
Epsom	Mid	Fashion Moderate
Purley Way North	Old	Fashion Moderate
Redhill	Mid	Fashion Moderate
Orpington	Old	Traditional
Dorking	Old	Traditional
Tonbridge	Mid	Updated Classic
East Grinstead	Old	Updated Classic
Sevenoaks	Old	Traditional
Reigate	Old	Fashion Moderate
Gatwick Airport South	Old	Progressive
Caterham	Old	Updated Classic
Gatwick Airport North	Mid	Upper Middle
West Wickham	Old	Traditional
Wallington	Mid	Traditional
Banstead	Old	Fashion Moderate
Purley	Old	Progressive
Horley	Old	Fashion Moderate
Oxted	Old	Traditional
Coulsdon	Old	Fashion Moderate
Selsdon	Old	Progressive
Biggin Hill	Old	Progressive
New Addington	Old	Fashion Moderate
Sanderstead	Old	Fashion Moderate

2.12 The choice of centres within sub-region cater for a wide range of tastes from traditional through to progressive. The fashion offer in Caterham and Oxted is focused more towards the older customer, with Caterham slightly more progressive and described as "Updated Classic", whilst Oxted is considered to be more traditional.

Existing Retail Provision in Tandridge

2.13 An assessment of the existing retail and service provision in the main centres was provided in centre audits included at Appendix 5 of the TRLS 2015. Tandridge Council's emerging Town and Local Centre Review has been adopted to explore key changes in the mix of uses since the TRLS 2015 was prepared. A summary of these changes is provided in Table 2.3 overleaf.

2.14 Information within the emerging Town and Local Centre Review suggests the number of Class A1 retail uses has reduced slightly (-11 units) between 2014 and 2017, a small decrease of 3.7%. The number of vacant units has increased by 5 units.

2.15 The Town and Local Centre Review indicates evidence of retail decline in most centres, but overall the changes are relatively insignificant and are unlikely to have led to significant changes in shopping patterns within the District. This trend has been reflected in many centres across the Country, with the vacancy rate relatively stable, but a small shift from retail to non-retail uses.

Table 2.3 Number of Retail Units and Vacant Units in Main Centres 2014 to 2017

		Oxted	Caterham Valley	Caterham Hill	Warlingham	Whyteleafe	Lingfield	Godstone	Smallfield
A1 Retail	2014 2017	89 89	84 81	49 42	17 15	15 17	29 30	12* 14	n/a 11
Vacant Units	2014 2017	4 3	8 10	5 3	1 0	3 1	2 11	1* 1	n/a 0
Difference	A1 Vacant	0 -1	-3 +2	-7 -2	-2 -1	+2 -2	+1 +9	-2* 0	n/a n/a

* 2014 figures quoted for Godstone are based on Lichfields' on site survey in 2015

2.16 Caterham Valley and Oxted are still the main shopping destinations within the District, similar in size in terms of number of shop units and the amount of retail sales floorspace. Caterham Hill, Lingfield, Warlingham and Whyteleafe continue to support the two main centres, serving their respective settlements and smaller catchment areas. They provide a more limited range of shops and non-retail services.

3.0 Retail, Food and Beverage Capacity Assessment

3.1 This section objectively assesses the quantitative scope for new retail and food/beverage floorspace in Tandridge in the period from 2018 to 2033. The assessment follows the same approach adopted in the TRLS 2015. A summary of the methodology and key data inputs is contained in Appendix 1.

Study Area

3.2 The quantitative analysis is based on the District authority area, divided into four zones based on ward boundaries, as adopted in the TRLS 2015. The study area zones are shown in Appendix 1.

Price Base

3.3 All monetary values expressed in this study are at 2016 prices, consistent with Experian's base year expenditure figures for 2016 (Retail Planner Briefing Note 15, December 2017) which is the most up to date information available. The TRLS 2015 adopted price base was 2013, therefore expenditure and turnover estimates are not directly comparable. Since 2013 there has been deflation of -1.6% for both comparison and convenience goods (source: Experian's Briefing Note 15).

Population Projections – Growth Scenarios

3.4 The District's baseline population projections for 2016 is set out in Table 1A in Appendix 2. The 2016 base year population for each zone has been obtained from Experian, consistent with the Office of National Statistics (ONS) 2014 based population figures at 2016.

3.5 Population has been projected forward based on three scenarios, as follows:

1. Baseline Growth - 300 dwellings per annum;
2. Medium Growth - 470 dwellings per annum (consistent with ONS 2014 based projections);
3. High Growth - 645 dwellings per annum.

3.6 Population growth up to 2026 has been distributed pro-rata within each zone based on known residential commitments and allocations. Residual dwellings required to meet the assumed completion rates above (i.e. 300, 470 or 645 dwellings p.a.) are assumed to be provided in a new Garden Village located in Zone 4 (SW Tandridge), with the size of the Garden Village dependant on the growth scenario adopted.

3.7 Tables 1A, 1B and 1C in Appendix 2 set out the population projections for each growth scenario. The baseline scenario assumes the District's population will increase from 86,700 in 2016 to 96,045 in 2033. We understand at this stage that this is the most likely growth scenario. The medium and high growth scenarios provide a sensitivity analysis, and suggest an end year population of 100,500 and 105,080 respectively.

3.8 The TRLS 2015 assumed the District's population would increase to around 99,200 by 2033, slightly below the medium growth scenario.

Expenditure

3.9 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, convenience goods and food/beverage for each of the study area zones for the year 2016 have been obtained.

Growth Projections

3.10 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

3.11 Experian's EBS growth forecast rates for 2016 to 2019 reflect the current economic circumstances and provide an appropriate growth rate for the short term, as shown below.

	2016 to 2017	2017 to 2018	2018 to 2019
Convenience goods	0%	-0.6%	-0.2%
Comparison goods	+2.3%	+0.9%	+2.1%
Food/Beverage	+0.3%	-0.1%	+0.8%

3.12 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2019. Experian's previous long term projection adopted in the TRLS 2015 was higher at 0.6% per annum.

3.13 Experian's latest long term growth rate is 3.2% per annum growth for comparison goods after 2019, compared with 3.3% per annum in the TRLS 2015. The food and beverage growth rate is 1.1% after 2019, compared with 1.3% per annum in the TRLS 2015. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Deductions for Special Forms of Trading

3.14 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.15 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the Special Forms of Trading (SFT) market share will continue to grow, however the pace of e-commerce growth will moderate markedly after 2022.

3.16 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

3.17 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2016 was:

- 9.6% of convenience goods expenditure; and
- 18.0% of comparison goods expenditure.

3.18 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2016 were:

- 2.9% of convenience goods expenditure; and
- 13.5% of comparison goods expenditure.

3.19 The projections provided by Experian suggest that these percentages could increase to 5.2% and 17.9% by 2033 respectively. These figures have been adopted in this assessment.

Total Available Expenditure

3.20 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2033. Forecasts of comparison goods and food/beverage spending per capita are shown in Table 3 in Appendix 3 and Appendix 4 respectively.

3.21 As a consequence of growth in population described above, convenience goods spending within the District is forecast to increase by 8.1% from £201.53 million in 2018 to £217.88 million in 2033, as shown in Table 3A (Appendix 2).

3.22 Comparison goods spending is forecast to increase by 67.6%, increasing from £342.43 million in 2018 to £574 million in 2033, as shown in Table 3A (Appendix 3).

3.23 Food and beverage spending is forecast to increase by 29%, increasing from £115.54 million in 2018 to £149.07 million in 2033, as shown in Table 3A (Appendix 4).

3.24 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on grocery items does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.25 These figures relate to real growth and exclude inflation.

Existing Spending Patterns 2018

3.26 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The results of the household shopper questionnaire survey undertaken by NEMS in June 2015 have been used to estimate base year shopping patterns within the study area zones. Minor adjustments have been made to reflect changes since 2015, primarily the completion of commitments in Redhill.

3.27 The total turnover of shops and food/beverage outlets within Tandridge is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Convenience Shopping

3.28 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each zone are shown in Table 4A, Appendix 2. The level of convenience goods expenditure attracted to shops/stores in Tandridge in 2018 is estimated to be £152.3 million as shown in Table 5, Appendix 2.

3.29 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

3.30 Changes in convenience goods sales areas between 2015 and 2018 have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

3.31 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Tandridge and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area has been adopted. The total benchmark turnover of the existing convenience sales floorspace within Tandridge District is £160.15 million at 2018 (Table 9, Appendix 2).

3.32 These figures suggest that collectively convenience retail facilities in the District are trading 5.5% below the average benchmark turnover, which suggests there is currently a sufficient supply of convenience goods floorspace. The TRLS 2015 estimated that convenience retail facilities in the District were trading 6.7% below the average benchmark turnover in 2015, which suggests there has been a slight improvement in trading levels since 2015.

Comparison Shopping

3.33 The estimated comparison goods expenditure currently attracted by shopping facilities within Tandridge District is £77.61 million in 2018, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the District.

3.34 The TRLS 2015 estimated that the base year comparison goods turnover of the District was about £75 million in 2015 (adjusted to 2016 prices), which suggests there has been only modest real growth (+2%) in Tandridge's comparison goods turnover since 2015. This below average growth is consistent with the slight reduction in Class A1 uses within the main centres outlined in Section 2.

3.35 The average sales density for existing comparison sales floorspace (around 12,800 sq.m net) is just over £6,000 per sq.m net. Global Data provides company average sales density information for a selection of national comparison retailers. Based on Global Data sales density information for comparison goods operators and Lichfields' recent experience, this average sales density suggests existing comparison goods facilities within the District are currently trading satisfactorily, but there is no indication of over-trading or under-trading.

Food and Beverage

3.36 The estimated food and beverage expenditure currently attracted by facilities within Tandridge District is £73.85 million in 2018, as shown in Table 5, Appendix 4. The TRLS 2015 estimated that the base year food and beverage turnover of the District was about £76 million in 2015, which suggest there has been a small reduction in Tandridge's food and beverage turnover since 2015.

3.37 The average sales for existing food and beverage outlets (80 Class A3/A4/A5) is around £900,000 per outlet. Based on Lichfields' recent experience, this average level of sales per outlet suggests existing food/beverage facilities within the District are also trading satisfactorily.

Capacity for Convenience Goods Floorspace

3.38 Future market shares, adjusted to reflect the proposed Lidl store in Caterham are shown in Table 4B in Appendix 2. The baseline future levels of available convenience goods expenditure in 2023, 2028 and 2033 are shown at Tables 6, 7A and 8A in Appendix 2. The baseline total level of convenience goods expenditure available for shops in the District between 2018 and 2033 is summarised in Table 10A (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £152.30 million in 2018 to £164.65 million in 2033. The medium and high growth scenarios are shown in Table 10B and 10C, and the end year forecasts are £171.09 million and £177.72 million respectively.

3.39 The summary Tables 10A to 10C subtract the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is an existing deficit of -£7.85 million convenience goods expenditure at 2018, primarily concentrated in Zone 2 - Caterham. By 2023, this deficit increases to -£9.52 million due to the proposed Lidl store in Caterham, but decreases to -£5.51 million in 2028 and -£1.56 million in 2033. The medium and high growth scenarios produce small expenditure surpluses at 2033, i.e. £4.88 million and £11.51 million respectively.

3.40 The deficit/surplus expenditure projections have been converted into floorspace estimates in Tables 11A, 11B and 11C. Expenditure is converted into floorspace estimates using an assumed average sales density figure of £12,000 per sq.m, based on a generic average turnover density for the main food supermarket operators. The floorspace projections are summarised in Table 3.1 below.

3.41 The projections suggest there is limited or no capacity for new convenience goods floorspace in Oxted and Caterham/Warlingham/Whyteleafe, because the growth in population/expenditure does not offset the current under-trading. The medium and high growth scenarios also indicate a negative or limited floorspace capacity up to 2033 in these areas.

Table 3.1 Baseline Convenience Goods Floorspace Projections (SQ.M Gross)

	By 2023	By 2028	By 2033
Zone 1 - Oxted	0	0	0
Zone 2 - Caterham/Warl./Whyte.	0	0	0
Zone 3 - Lingfield	348	354	355
Zone 4 - Godstone/Smallfield	612	621	623
Zone 4 - Garden Village	0	205	546
District Total	**960**	**1,180**	**1,524**

Source: Table 11A, Appendix 2 Negative floorspace projections excluded.

3.42 Floorspace capacity is higher in Lingfield and Godstone/Smallfield primarily due to existing above average trading levels rather than future population/expenditure growth. Potential new residential development within a Garden Village will generate capacity for new convenience goods floorspace i.e.546 sq.m gross at 2033 for the baseline scenario. This would increase to 1,179 sq.m gross or 1,830 sq.m gross for the medium and high growth scenarios.

3.43 The TRLS 2015 retail capacity assessment suggested a global 2033 floorspace capacity projection of 2,986 sq.m gross. The medium and high growth floorspace projections are lower than this previous figure, despite the higher population growth projections. These higher population projections have been offset by Experian's lower expenditure growth forecasts.

Capacity for Comparison Goods Floorspace

3.44 As assumed in the TRLS 2015, the comparison goods retail capacity projections assume centres within Tandridge District will experience some impact from proposed developments in neighbouring authorities, in particular major development in Croydon (Westfield/Hammerson). The TRLS 2015 indicated that some retail development will be necessary in Tandridge District in order to prevent market shares falling significantly in the future, and that an appropriate strategy for the District should be to seek to prevent market shares falling significantly. As assumed in the TRLS a modest reduction in Caterham and Oxted's market share of comparison goods expenditure is envisaged in 2023 and beyond.

3.45 Available comparison goods expenditure has been projected forward to 2023, 2028 and 2033 based on the penetration rates in Tables 6 in Appendix 3, and summarised in Tables 10A, 10B and 10C. The baseline available comparison expenditure to facilities within the District is expected to increase from £77.61 million in 2018 to £119.53 million in 2033.

3.46 Table 10A assumes that the turnover of comparison floorspace will increase in real terms in the future. An average growth rate of 2% per annum is adopted, as recommended by Experian. This growth will help to maintain the health and viability of town centres.

3.47 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 11A in Appendix 3, adopting average sales densities in 2016 of £6,000 per sq.m, which is projected to grow by 2% in the future due to improved turnover efficiency. Globally, the surplus expenditure at 2033 could support 2,166 sq.m gross of comparison sales floorspace in the District. The floorspace projections are summarised in Table 3.2 below.

3.48 The projections suggest there is limited capacity for new comparison goods floorspace up to 2023, because the growth in population/expenditure does not fully offset impact of development in neighbouring authorities until after 2023. The medium and high growth scenarios produce higher global capacity figures at 2033 i.e. 2,839 sq.m gross and 3,531 sq.m gross respectively.

Table 3.2 Baseline Comparison Goods Floorspace Projections (SQ.M Gross)

	By 2023	By 2028	By 2033
Zone 1 - Oxted	81	543	1,014
Zone 2 - Caterham/Warl./Whyte.	0	93	554
Zone 3 - Lingfield	23	49	73
Zone 4 - Godstone/Smallfield	50	105	153
Zone 4 - Garden Village	0	134	373
District Total	**154**	**925**	**2,166**

Source: Table 11A, Appendix 3 Negative floorspace projections excluded.

3.49 The TRLS 2015 retail capacity assessment suggested a 2033 floorspace capacity projection of 3,438 sq.m gross, comparable with the high growth scenario. The medium growth floorspace projections are lower than this previous figure, despite the higher population growth projections. The higher population projection has been offset by Experian's lower expenditure growth forecasts.

Capacity for Food and Beverage Floorspace

3.50 As assumed in the TRLS 2015, the food and beverage capacity projections assume centres within Tandridge District will experience some impact from proposed developments in neighbouring authorities, in particular major development in Croydon (Westfield/Hammerson). Available expenditure has been projected forward to 2023, 2028 and 2033 in Tables 5, 7, 8A and 9A in Appendix 4, and summarised in Table 10A. The baseline level of available food and beverage expenditure within the District is expected to increase from £73.85 million in 2018 to £95 million in 2033.

3.51 Table 10A assumes that the turnover of food and beverage floorspace will increase in real terms in the future. A growth rate of 1% per annum is adopted. Surplus food and beverage expenditure has been converted into food and beverage floorspace projections at Table 11A in Appendix 4, adopting average sales densities in 2016 of £5,000 per sq.m gross, which is projected to grow by 1% in the future due to improved turnover efficiency. The surplus expenditure at 2033 could support 1,597 sq.m gross food and beverage floorspace in the District as a whole. The floorspace projections are summarised in Table 3.3 below.

Table 3.3 Baseline Food and Beverage Floorspace Projections (SQ.M Gross)

	By 2023	By 2028	By 2033
Zone 1 - Oxted	120	273	432
Zone 2 - Caterham/Warl./Whyte.	213	363	444
Zone 3 - Lingfield	52	94	119
Zone 4 - Godstone/Smallfield	80	138	170
Zone 4 - Garden Village	0	161	433
District Total	**465**	**1,029**	**1,597**

Source: Table 11A, Appendix 4

3.52 The medium and high growth scenarios produce higher capacity figures at 2033 i.e. 2,297 sq.m gross and 3,018 sq.m gross respectively.

3.53 The TRLS 2015 retail capacity assessment suggested a 2033 floorspace capacity projection of 2,842 sq.m gross. The medium growth floorspace projection is lower than this previous figure, despite the higher population growth projection. The higher population projection has been offset by Experian's lower expenditure growth forecasts.

4.0 Requirement for Other Town Centre Uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in Tandridge District, including cinemas, tenpin bowling, bingo, theatres, nightclubs and private health/fitness suites. The Council has also commissioned a separate study Assessing Needs and Opportunities for Indoor Sports Facilities in Tandridge (December 2017), which provides a more in-depth analysis of the need for indoor sports facilities provision up to 2033.

4.2 The TRLS 2015 indicated that residents in Tandridge District have relatively good access to range of commercial leisure and entertainment facilities in neighbouring authorities, where most of the key sectors are represented. Tandridge District's population has good access to major leisure parks in Croydon and Crawley, and also good public transport access to Central London. The proximity of major leisure facilities in these surrounding local authorities and the relatively small catchment population of towns in Tandridge District will continue to limit the potential for major commercial leisure facilities in the District.

Cinemas

4.3 Cinema admissions in the UK 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, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2016 were 168.3 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2016 UK national average is 2.6 trips per person.

4.4 The Cinema Advertising Association identifies 788 cinema facilities with 4,194 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, in order to identify areas of under and over-provision. The latest (2016) national average is about 40,000 cinema trips per screen per annum, or 210 trips per seat per annum.

4.5 As in 2015, the only permanent cinema within Tandridge District is the Everyman Cinema in Oxted. This small independent cinema has three screens and a capacity of 212 seats (source: UK Cinemas.

4.6 The 2015 household survey indicated that Everyman cinema in Oxted only attracted 35.3% of cinema trips generated in the District, with a significant outflow of trips to Crawley, Croydon and East Grinstead.

4.7 Tandridge District's population in 2018 (88,200 people) will generate 229,300 cinema trips per annum, based on the national visitation rate (2.6 trips per annum). The market shares estimated from the household survey (35.3%) suggests about 80,900 of these cinema trips could be attracted to the Everyman cinema in Oxted in 2018. These figures suggest the Everyman cinema attracts about 27,000 trips per screen or 382 trips per seat in 2018. This is below the national average for screens (40,000 trip per screen) but above the national average for seats (210 trips per seat).

Based on the national average trips per cinema seat (210 trips per seat), 229,300 trips in the District as a whole in 2018 generates demand for 1,091 cinema seats. Tandridge District's population at 2033 (96,045) could generate demand for 1,189 cinema seats or 5 to 6 screens, assuming all trips are retained within the District, which is unlikely. The medium and high growth scenarios suggest demand for 1,244 and 1,301 cinema seats by 2033 respectively.

4.8 If Tandridge District can increase its market share of cinema trips then there could be scope for another small independent cinema within the District.

Theatres

4.9 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UKTheatre's membership).

4.10 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, Tandridge's population in 2018 (88,200 people) generates only 44,100 theatre trips per annum.

4.11 This trip estimate, when compared with the British Theatre Consortium/British Theatre Repertoire average of around 121,000 visits per theatre venue, suggests the District's population on its own is not capable of supporting more theatres.

4.12 The 2015 household survey indicates most theatre trips generated in the District are attracted to Central London/West End (70.4%). The Miller Centre in Caterham (6.7%) and The Barn Theatre in Oxted (6.6%) have a relatively low market share of trips.

4.13 Tandridge District's baseline population at 2033 (96,045) could generate 48,000 theatre trips, an increase of 3,900 trips. The medium and high growth scenarios suggest an increase of 6,100 and 8,400 tips by 2033 respectively. Based on current market shares a small proportion of these additional trips are likely to be retained in the District.

4.14 There is no clear need for additional theatre provision in Tandridge District, even based on the high growth scenario.

Private Health and Fitness Clubs

4.15 The Assessing Needs and Opportunities for Indoor Sports Facilities in Tandridge (December 2017) recommends that existing indoor sports facilities at Tandridge Leisure Centre, de Stafford Sports Centre and The Village Health Club serve an existing need and should be protected. The study also recommends the provision of new or enhanced facilities to meet future housing development needs in order to avoid deficiencies in accessibility, quality or quantity.

4.16 The 2015 household survey indicated that 34.1% of respondents or their families visit health/fitness clubs. Of the participating households, around two thirds visited health and fitness facilities within Tandridge District. This implies one third of the trips to health and fitness facilities flow out of the District, which may be due in part to out-commuting from the District.

4.17 The Sport England/Active Places 2018 data indicates there are 13 health and fitness suites in the District, of which 5 are for school's private use only. These private uses facilities are relatively small, with 78 fitness stations in total (space for each piece of fitness equipment). The 8 suites open to the general public (including registered members) have 248 fitness stations. Existing provision is shown in Table 4.1.

4.18 The South East London region currently has 1,174 registered health and fitness suites with 54,899 fitness stations (average of 32 stations per suite). This existing provision equates to around 6.1 fitness stations per 1,000 people. Tandridge has 341 fitness stations (3.9 per 1,000 people), which is lower than the regional average (6.1 stations).

Table 4.1 Tandridge Health and Fitness Clubs 2018 (Sport England listed facilities only)

Name	Type	No. Stations
Chartham Park Golf & Country Club	Members	44
De Stafford Sports Centre (Caterham)	Pay and play	51
Le Club Effingham Park (Felbridge)	Pay and play	32
Lifeline Fitness (Oxted)	Pay and play	22
Marriott Leisure Club (Lingfield Park)	Members	9
Tandridge Leisure Centre (Oxted)	Pay and play	50
The Village Health Club (Caterham)	Members	30
Caterham School Sports Centre	Private Use	30
Woldingham School	Private Use	16
St Piers School	Private Use	10
Lingfield Notre Dame School	Private Use	17
Oxted School	Private Use	4
The Limpsfield Club	Members	8
Warlingham School	Sports Club/Community Assoc.	18
Total		**341**

Source: Sport England/Active Places Data 2018

4.19 As indicated above, Tandridge only retains two thirds of health and fitness users in the District, which would reduce the population potential to 59,100 people. This reduced population suggests 5.8 fitness stations per 1,000 people, which is closer to the regional average (6.1 stations). These figures suggest health and fitness clubs in the District are trading healthily above the regional average, despite the high outflow of trips.

4.20 The District' population in 2018 (88,200) is projected to grow to 96,045 by 2033, for the baseline scenario. If health and fitness facilities within the District continue to retain two thirds of trips in the District, then the health and fitness catchment population is about 59,100 in 2018, increasing to 64,300 in 2033.

4.21 On the basis that Tandridge District retains two thirds of trips, the required supply of fitness stations to meet demand (assuming 6 stations per 1,000 people) would be 355 stations in 2018, which would increase to 386 stations by 2033. This suggests the existing shortfall is 14 fitness stations, which will increase to 45 stations in 2033. The baseline projections suggest there is scope for 1 to 2 additional health and fitness facilities in the District by 2033.

4.22 The medium and high growth scenarios would generate demand for 404 and 422 fitness stations by 2033 respectively. The medium and high growth projections suggest there is scope for 2 to 3 additional health and fitness facilities in the District by 2033.

4.23 Caterham, Oxted and the proposed new Garden Village are the most likely locations for this new provision.

Tenpin Bowling

4.24 There are no tenpin bowling facilities in Tandridge District, although 21.7% of households interviewed in the household survey indicated they go bowling. The tenpin bowling facilities visited were in Crawley, Croydon and Tunbridge Wells.

4.25 Tandridge District's population (88,200 in 2018) as a whole could theoretically support 7 lanes, based on one lane per 12,000 people (national average). The baseline population at 2033 (96,045) could support 8 lanes. The high growth population at 2033 (105,080) could support 9 lanes.

4.26 These figures, and the dispersed nature of population within Tandridge District and the provision of bowling facilities in Croydon and Crawley suggest that tenpin bowling facilities would not be viable in the District.

Bingo, Games of Chance and Gambling

4.27 Gala 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. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL).

4.28 There are no mainstream bingo facilities in Tandridge District. The household survey results indicated that only 2.7% of households in the District visited bingo facilities, and most of these visit Gala Bingo in Crawley or Mecca Bingo in Croydon. The national average bingo visitation rate is around 5%.

4.29 The adult (over 18) population of Tandridge District (around 70,000) would generate about 120,000 admissions based on the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the District population could in theory support one bingo facilities, assuming all trips were retained within the District, which is unlikely. There is no clear need for a bingo facility in Tandridge District.

Nightclubs/Live Music Venues

4.30 The nightclub/live music sector has struggled in recent years. IBIS World suggests have lost their competitive advantage over pubs or 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.

4.31 The 2015 household survey results indicated that only that 9.7% of households in Tandridge District visited nightclubs, but only 1% of these households attended a nightclub event in the District. The most popular destinations mentioned were Central London, Croydon and Crawley. The provision of nightclubs in these locations will limit the potential for major new nightclubs in the District. There is no clear need for additional nightclub facilities in Tandridge District.

Other Leisure, Entertainment and Cultural Uses

4.32 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. museums, art galleries, exhibition space, casinos, ice rinks, trampoline centres, tourist attractions and new emerging leisure activities such as family entertainment centres, escape rooms and virtual golf centres. Given the fragmented nature of this sector it is difficult to quantify the potential demand for these uses over the plan period.

5.0 Recommendations

Introduction

5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) 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. The need for development should be met in full and should not be compromised by limited site supply. However the NPPF Consultation Proposals (March 2018) suggests accommodating a minimum of ten years may be more appropriate than the full plan period.

5.2 In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.3 The National Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres.

5.4 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles.

5.5 This section assesses the scope to accommodate growth within Tandridge's main centres.

Floorspace Projections

5.6 The floorspace projections set out in the previous sections assume that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

1. the impact major retail developments in competing centres e.g. Croydon and Redhill;
2. the re-occupation of vacant retail floorspace;
3. the availability of land to accommodate new development;
4. the reliability of long term expenditure projections (beyond 10 years);
5. the effect of internet/home shopping on the demand for retail property;
6. the level of operator demand for floorspace in Tandridge District, recognising the polarisation of investment within larger centres; and
7. the ability of Tandridge District to maintain its existing market share of expenditure in the future in the face of increasing competition.

5.7 The floorspace projections up to 2028 in this study update are relatively modest, even based on the high growth scenario. The development strategy should seek to identify opportunities to accommodate the baseline growth up to 2033. Recognising the uncertainties relating to longer term floorspace projections, the medium and high growth projections up to 2033 should be treated with caution. The baseline growth projections are the most appropriate for translation into the development plan allocations at this stage. The medium and high growth projections should be monitored and kept under review.

5.8 The baseline projections up to 2033 suggest there is scope for 1,524 sq.m gross of convenience goods floorspace, 2,167 sq.m gross of comparison goods floorspace and 1,598 sq.m gross of Class A3 to A5 space. In total 5,289 sq.m gross could be required by 2033, as shown in Table 5.1.

Table 5.1 Summary of Baseline Floorspace Projections to 2033 (SQ.M Gross)

Location	Convenience Retail *	Comparison Retail	Food/Beverage	**Total**
Zone 1 - Oxted	0	1,014	432	**1,446**
Zone 2 - Caterham/Warl./Whyte.	0	554	444	**998**
Zone 3 - Lingfield	355	73	119	**547**
Zone 4 - Godstone/Smallfield	623	153	170	**946**
Zone 4 - Garden Village	546	373	433	**1,352**
Total	**1,524**	**2,167**	**1,598**	**5,289**

Source: Appendix 2, 3 and 4 * negative floorspace projections are excluded and listed as "0"

Accommodating Growth

5.9 As suggested in the TRLS 2015, the existing stock of premises should have a role to play in accommodating projected growth. The TRLS 2015 suggested it was unrealistic to plan to achieve a significant reduction in vacancy rate in Oxted, Warlingham and Godstone, due to the low vacancy rate, but there was potential within other centres.

5.10 The emerging Town and Local Centre Review suggests the shop vacancy rate remains low in Oxted, Warlingham and Godstone, and limited projected growth can be accommodated in vacant floorspace. Vacant shop units in Caterham Valley, Caterham Hill, Caterham Westway could make a significant contribution towards meeting the projection in Zone 2 (998 sq.m gross by 2033).

5.11 The TRLS 2015 indicated that development options in Oxted town centre (Zone 1) appear to be limited, constrained by its historic environment, street layout and neighbouring residential areas. The previous study suggested there may be scope to redevelop areas on the south side of Station Road East. Recent residential development proposals suggest main town centre uses are unlikely to come forward in this area.

5.12 The regeneration of Oxted town centre is planned within the emerging RegenOxted proposals. RegenOxted is an ambitious plan to revitalise Oxted town centre through a multi-million pound programme of strategically important projects. Comprising four key projects, the programme will deliver:

- new housing through the redevelopment of the redundant gasholder site;
- an urban redesign project for Station Road East and West to make the town centre a more attractive place for shoppers and visitors;
- additional parking capacity for shoppers, visitors and businesses; and
- creation of a business hub to provide affordable, flexible office space.

5.13 It is unclear whether there will be potential for new retail and leisure uses within these proposals. Notwithstanding the RegenOxted proposals, small scale intensification and extensions in Oxted town centre could meet some, but probably not all, of the floorspace projection up to 2033 (1,446 sq.m gross) e.g. extension in to services areas to the rear. Depending on the nature of the RegenOxted proposals, some of the Oxted projection could be redistributed to the proposed Garden Village and/or Caterham.

5.14 The Caterham Town Centre Masterplan SPD identifies a six potential development areas in Caterham, as follows:

- Area 1: Waitrose Supermarket, Quadrant House and surrounds in Caterham Valley;
- Area 2: Station Avenue, Caterham Valley;
- Area 3: Church Walk and surrounds in Caterham Valley;
- Area 4: Former Rose and Young Site, Caterham Valley;
- Area 5: Godstone Road, Caterham Valley; and
- Area 6: High Street, Raglan precinct, community centre, Caterham on the Hill.

5.15 These opportunities are expected to provide mixed use development with active frontages. The Draft Caterham Town Centre Masterplan SPD does not quantify the potential uplift in retail and town centre use floorspace that can be achieved within these opportunity areas, but these opportunities appear to be more than sufficient to accommodate the Zone 2 projection (998 sq.m gross).

5.16 The TRLS 2015 also identified the Rose and Young site in Caterham Valley as having development potential and that emerging proposals for the site suggest that around 1,100 sq.m gross of Class A1/A3 floorspace could be accommodated at ground floor level. A new Lidl food store is proposed on this site as part of a mixed use development. Vacant shop units were expected to accommodate up to 1,200 sq.m gross, and the overall potential to accommodate growth in Caterham Valley was estimated to be 2,300 sq.m gross. This estimate is considerably more than the baseline projection (998 sq.m gross by 2033).

5.17 As indicated above, some of the floorspace capacity related to Zone 1 – Oxted (1,446 sq.m gross) and Zone 3 - Godstone and Smallfield (946 sq.m gross) could be redirected to Caterham, if insufficient sites are available to accommodate growth in these locations.

5.18 In Zone 3, the level of shop vacancy in Lingfield has increased in recent years and the floorspace projection (547 sq.m gross) can be accommodated in vacant units.

5.19 If a new Garden Village is implemented then a significant proportion (at least 25%) of the District wide floorspace capacity could be provide within the development, in the form of a new district or neighbourhood centre, serving the needs of the new residential area.

5.20 Depending on the location of the Garden Village in Zone 4, some of the floorspace capacity related to Zone 1 –Oxted and Zone 4 - Godstone and Smallfield could be redirected to the Garden Village, if insufficient sites are available to accommodate growth in these locations. The baseline figures, suggest a district/neighbourhood centre of at least 1,400 sq.m gross could be provided in the Garden Village by 2033. If the medium or high growth projections are achieved then a district/neighbourhood centre of between 3,100 to 4,800 sq.m gross could be provided.

Hierarchy of Centres

5.21 The current Core Strategy (CSP23) identifies a District-wide hierarchy, including two Town Centres and four Local Centres. The analysis and projections in this update, suggest Oxted and Caterham Valley should continue to be designated as the main Town Centres in the District, of equal importance.

5.22 Warlingham, Lingfield, Caterham Hill and Whyteleafe should continue to be designated “Local Centres” that support the two Town Centres. These centres play an import role in meeting local shopping needs.

5.23 The TRLS 2015 suggested that Godstone could also be designated as a Local Centre, based on the range and mix of facilities available within the village. A Local Centre boundary concentrated in the historic part of the village could be considered, although this is likely to include a number of residential properties. Smallfield could also be considered for designation as a Local Centre.

5.24 Other neighbourhood centres should be identified in the development plan because they also serve and important shopping role, as follows:

- Bletchingley;
- Hurst Green; and
- Caterham Westway.

5.25 The findings of the emerging Town and Local Centre in relation to local and neighbourhood centres is set out below.

Shopping Frontages and Boundaries

5.26 The emerging Tandridge Town and Local Centre Review 2018 provides an up to date analysis of shopping frontages and boundaries in the District. An overview of NPPF guidance on the designation of boundaries and frontages was outlined in Section 5.0 of the TRLS 2015. This guidance remains unchanged and the NPPF provides limited guidance on how these areas, particularly shopping frontages should be identified.

Caterham Valley and Oxted Town Centres

5.27 As indicated in the TRLS 2015 and the emerging Town and Local Centre Review, future planning policies for Caterham Valley and Oxted town centres should continue to define a separate Shopping Area and Town Centre boundary, because these centres have concentrations of other town centre uses adjoining the main shopping area, e.g. the Civic area, car parks and employment uses. A separate Shopping Area is necessary for applying the sequential approach for Class A1 retail uses.

5.28 Consistent with Policy DP2, future policies should also continue to distinguish between primary and secondary frontages in the town centres. The emerging Town and Local Centre Review suggests there have been some changes in the mix of uses within these centres since 2015, but the overall proportion of Class A1 uses within the defined primary frontages remains relatively high. No changes to the A1 thresholds in Policy DP2 are considered necessary.

5.29 The emerging Town and Local Centre Review indicates Oxted is performing well against the criteria set in Policy DP2, but some minor changes between primary and secondary frontage designations may be required in order to maintain the long-term viability of certain areas, as follows:

- 12-48 Station Road East – primary frontage minimum A1 threshold breached;
- 54-48 Station Road East – primary frontage minimum A1 threshold breached;
- 129-139 Station Road East – primary frontage minimum A1 threshold breached; and
- 3-39 Station Road West – secondary frontage minimum A1 threshold breached.

5.30 In Caterham Valley, the emerging Town and Local Centre Review indicates there has been a significant decline in Class A1 units in some areas, particularly in the secondary frontages, and changes within the following areas should be considered:

- 1-19 Godstone Road – primary frontage minimum A1 threshold breached;

- 12-48 Croydon Road – primary frontage minimum A1 threshold breached;
- 1-65 Croydon Road – primary frontage minimum A1 threshold breached;
- 2-10 Croydon Road – primary frontage minimum A1 threshold breached;
- 4-14 The Square Road – primary frontage minimum A1 threshold breached;
- 18-32 Station Avenue – secondary frontage minimum A1 threshold breached;
- 50-64A Croydon Road – secondary frontage minimum A1 threshold breached;
- 66-82 Croydon Road – secondary frontage minimum A1 threshold breached; and
- 9-31 Station Avenue – secondary frontage minimum A1 threshold breached.

Local Centres

5.31 The TRLS 2015 confirmed that the local centre boundaries at Caterham Hill and Whyteleafe cover the main concentration of town centre uses, but the centre boundary at Warlingham could be extended to the east to include the petrol station, public house and additional retail units on Limpsfield Road and Farleigh Road. The emerging Town and Local Centre Review concurs there is justification for expansion of local centre boundary to the east i.e. 415/441 Limpsfield Road-3/5 Farleigh Road and 420-436 Limpsfield Road.

5.32 The emerging Town and Local Centre Review recommends the following new boundary designations:

- Godstone - designation as a local centre;
- Smallfield - designation as a local centre;
- Bletchingley - designation as a neighbourhood centre;
- Hurst Green - designation as a neighbourhood centre; and
- Caterham Westway - designation as a neighbourhood centre.

5.33 The emerging Town and Local Centre Review also recommends the following new primary shopping frontage designations:

- 14-48 Chaldon Road, Caterham Hill;
- 2-16 East Grinstead Road, Lingfield;
- 1-11 East Grinstead Road, Lingfield;
- 96-110, The Old Parish Hall and The Old Forge Deli High Street, Godstone;
- Wheelers Lane, 2-4 Redehall Road and St. Bartholomew Burtsow, Smallfield; and
- 1-11 The Parade, Redehall Road, Smallfield.

Impact Thresholds and the Sequential Test

5.34 The TRLS 2015 indicated that the NPPF impact threshold (2,500 sq.m gross) was inappropriate in Tandridge District, because a single development proposal could exceed the entire development plan floorspace projection in some towns without the need for a retail impact assessment. Furthermore the vitality and viability of the some centres was fragile i.e. Caterham and Lingfield. The revised retail capacity projections are lower than those contained in the TRLS, and the vitality and viability of some centres remains fragile. The TRLS 2015 recommendations in relation to impact thresholds remain appropriate.

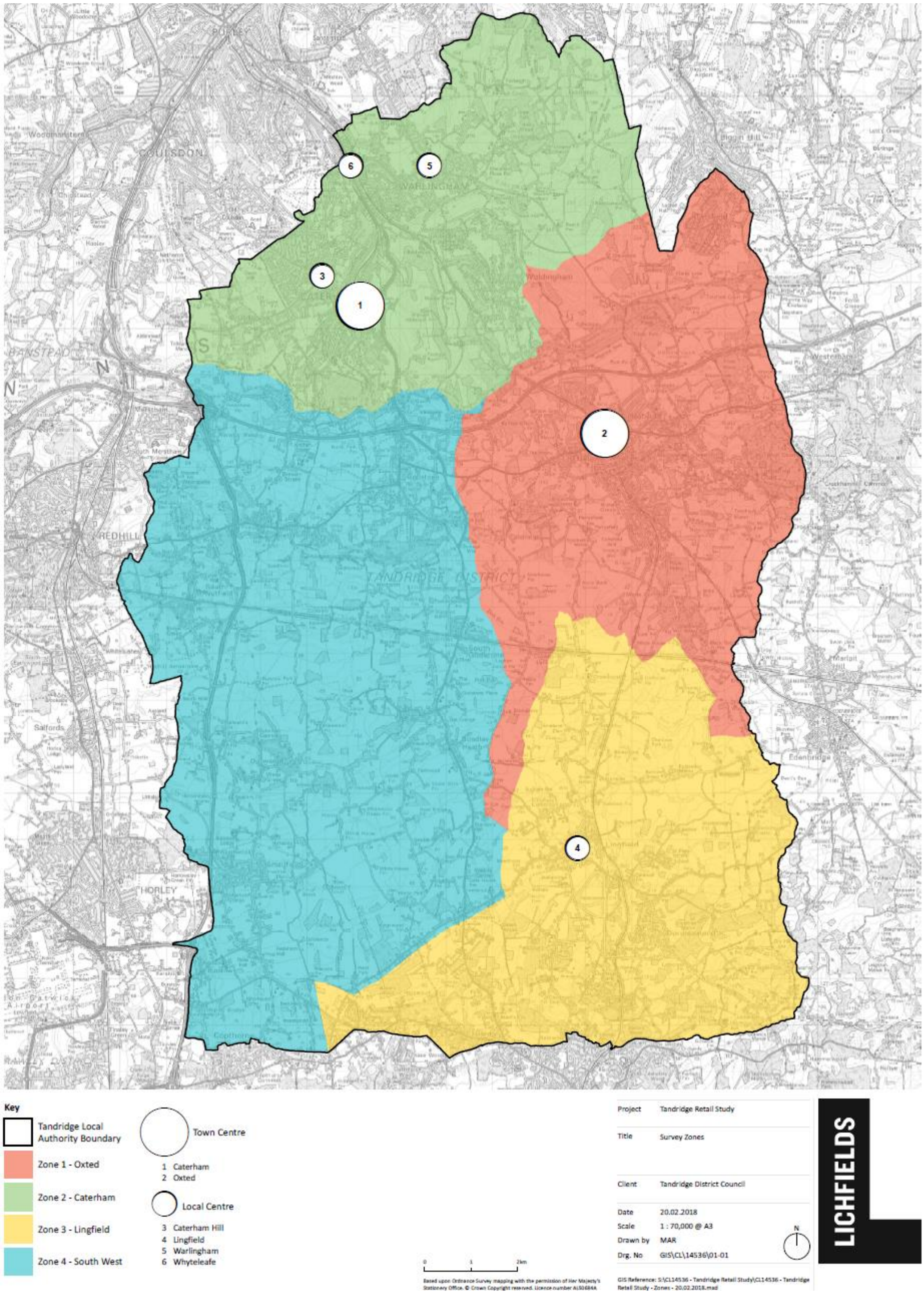
5.35 Retail development over 500 sq.m gross and located outside the town and local centres boundaries should be required to prepare a retail impact assessment.

5.36 Leisure and other main town centre uses over 1,000 sq.m gross and located outside town and local centre boundaries should be required to prepare an impact assessment.

5.37 In terms of the sequential approach, development that serves more than a local catchment area should be concentrated in Caterham Valley or Oxted town centres. The two main centres in the District (Caterham Valley and Oxted) have the best prospects for attracting investment, and should continue to be the main focus for future town centre uses, particularly comparison retail floorspace and restaurant uses. Development of more than local significance (over 500 sq.m gross) should consider sequential sites within and on the edge of these two town centres.

5.38 If a new district/neighbourhood centre is proposed within a new Garden Village then the development should indicate the appropriate scale of centre. Development above this scale of development should also be the subject of an impact assessment.

Appendix 1: The Study Area


COULSDON
WARLINGHAM
REDHILL
HORLEY
TANDRIDGE DISTRICT
Edenbridge
1
2
3
4
5
6
Key
Tandridge Local Authority Boundary
Zone 1 - Oxted
Zone 2 - Caterham
Zone 3 - Lingfield
Zone 4 - South West
Town Centre
1 Caterham
2 Oxted
Local Centre
3 Caterham Hill
4 Lingfield
5 Warlingham
6 Whyteleafe
0
1
2km
Based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. © Crown Copyright reserved. Licence number AL50684A
Project Tandridge Retail Study
Title Survey Zones
Client Tandridge District Council
Date 20.02.2018
Scale 1 : 70,000 @ A3
Drawn by MAR
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GIS Reference: S:\CL14536 - Tandridge Retail Study\CL14536 - Tandridge Retail Study - Zones - 20.02.2018.mxd
LICHFIELDS

Methodology and Data

Price Base

All monetary values expressed in this study are at 2016 prices, consistent with Experian's base year expenditure figures for 2016 (Retail Planner Briefing Note 15, December 2017) which is the most up to date information available.

Retail Expenditure

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, convenience goods and food/beverage for each of the study area zones for the year 2016 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 15) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2016 to 2019 reflect the current economic circumstances and provide an appropriate growth rate for the short term, as follows.

	2016 to 2017	2017 to 2018	2018 to 2019
Convenience goods	0%	-0.6%	-0.2%
Comparison goods	+2.3%	+0.9%	+2.1%
Food/Beverage	+0.3%	-0.1%	+0.8%

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2019; 3.2% per annum growth for comparison goods after 2019; and food and beverage 1.1% after 2019. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2016 was:

- 9.6% of convenience goods expenditure; and
- 18.0% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2016 were:

- 2.9% of convenience goods expenditure; and
- 13.5% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.1% and 17.8% by 2031 respectively. These figures have been adopted in this assessment.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after 2022.

The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the June 2015 household survey.

The total turnover of shops and food/beverage outlets within Tandridge District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

Changes in convenience goods sales areas between 2015 and 2018 have been derived from the Institute of Oxford Retail Consultants (ORC) StorePoint database. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Tandridge and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area has been adopted. The total benchmark turnover of identified convenience sales floorspace within Tandridge is £160.15 million (Tables 9 Appendix 2).

Global Data provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges from £5,000 to £8,000 per sq.m net. An average sales density of £6,000 per sq.m net is adopted for new development in the District at 2018, which is inflated based on Experian's recommended growth rates for comparison floorspace i.e. 0.9% in 2019, 1.8% in 2020, 2.3% p.a. between 2021 and 2024 and 2.2% p.a. beyond 2024.

An average sales density of £5,000 per sq.m gross is adopted for new food and beverage floorspace, based on Lichfields' of other recent studies. This sales density has been increase by 1% p.a. to allow for improvements in turnover efficiency.

Appendix 2: Convenience Goods Capacity

Table 2: Convenience Goods Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Oxted	2,351	2,336	2,333	2,335
Zone 2 - Caterham	2,168	2,154	2,152	2,153
Zone 3 - Lingfield	2,498	2,483	2,480	2,481
Zone 4 - SW Tandridge	2,351	2,336	2,333	2,335
Zone 4 - Garden Village	2,285	2,270	2,267	2,269

Sources:
Growth Rates: -0.6% in 2018, -0.2% in 2019 and 0.1% beyond 2019.
Excludes Special Forms of Trading

Table 3A: Total Convenience Goods Expenditure (£m) - Base Line Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	42.85	43.68	44.12	44.25
Zone 2 - Caterham	87.83	90.24	91.50	91.79
Zone 3 - Lingfield	26.88	27.30	27.53	27.59
Zone 4 - SW Tandridge	43.97	44.91	45.40	45.54
Zone 4 - Garden Village	0.00	0.00	3.26	8.71
Total	**201.53**	**206.14**	**211.81**	**217.88**

Source: Tables 1A and 2

Table 3B: Total Convenience Goods Expenditure (£m) - Medium Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	42.85	43.68	44.12	44.25
Zone 2 - Caterham	87.83	90.24	91.50	91.79
Zone 3 - Lingfield	26.88	27.30	27.53	27.59
Zone 4 - SW Tandridge	43.97	44.91	45.40	45.54
Zone 4 - Garden Village	0.00	0.00	5.58	18.82
Total	**201.53**	**206.14**	**214.13**	**227.98**

Source: Tables 1B and 2

Table 3C: Total Convenience Goods Expenditure (£m) - High Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	42.85	43.68	44.12	44.25
Zone 2 - Caterham	87.83	90.24	91.50	91.79
Zone 3 - Lingfield	26.88	27.30	27.53	27.59
Zone 4 - SW Tandridge	43.97	44.91	45.40	45.54
Zone 4 - Garden Village	0.00	0.00	8.57	29.21
Total	**201.53**	**206.14**	**217.12**	**238.38**

Source: Tables 1C and 2

Table 4A: Base Year Convenience Goods Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Morrison's, East Hill, Oxted	38.0%	2.5%	4.5%	17.3%	10.0%	10.0%
Little Waitrose, Station Road East, Oxted	15.4%	0.5%	0.0%	0.7%	0.0%	10.0%
Sainsbury's Local, Station Road East, Oxted	4.9%	0.0%	0.3%	0.6%	0.0%	10.0%
Co-op, Station Road East, Oxted	2.9%	0.1%	0.0%	0.2%	0.0%	10.0%
Other convenience shops, Oxted	3.8%	0.0%	0.0%	0.0%	0.0%	10.0%
Zone 1 Sub-Total	**65.0%**	**3.1%**	**4.8%**	**18.8%**	**10.0%**	
Morrison's, Church Walk, Caterham	0.1%	20.7%	0.0%	2.4%	0.0%	15.0%
Waitrose, Station Avenue, Caterham	0.0%	12.1%	0.6%	1.2%	0.0%	10.0%
Tesco, Coulsdon Road, Caterham	0.0%	19.1%	0.2%	0.3%	0.0%	10.0%
Co-op, Croydon Road, Caterham	0.0%	1.2%	0.0%	0.2%	0.0%	10.0%
Other convenience shops, Caterham/Caterham Hill	0.0%	2.7%	0.0%	0.0%	0.0%	10.0%
Sainsbury's, Warlingham	11.9%	19.2%	1.0%	3.2%	0.0%	30.0%
Other Warlingham	0.2%	3.3%	0.0%	0.0%	0.0%	10.0%
Whyteleafe	0.0%	0.5%	0.0%	0.0%	0.0%	10.0%
Zone 2 Sub-Total	**12.2%**	**78.8%**	**1.8%**	**7.3%**	**0.0%**	
Zone 3 - Lingfield	0.4%	0.0%	13.3%	3.1%	0.0%	5.0%
Zone 4 - Godstone/Smallfield	0.0%	0.4%	0.0%	13.8%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	50.0%	5.0%
Zone 3/4 Sub-Total	**0.4%**	**0.4%**	**13.3%**	**16.9%**	**50.0%**	
Tandridge District Total	**77.6%**	**82.3%**	**19.9%**	**43.0%**	**60.0%**	
Croydon	2.3%	12.7%	1.2%	1.7%	0.0%	n/a
East Grinstead	0.9%	0.0%	58.8%	10.0%	5.0%	n/a
Reigate and Banstead	0.4%	1.7%	0.0%	20.0%	20.0%	n/a
Sevenoaks	8.6%	0.0%	0.0%	0.0%	0.0%	n/a
Westerham	4.2%	0.3%	0.0%	0.0%	0.0%	n/a
Crawley	0.1%	0.0%	7.0%	3.7%	0.0%	n/a
Horley	0.3%	0.2%	3.1%	19.3%	15.0%	n/a
Other	5.6%	2.8%	10.0%	2.3%	0.0%	n/a
Other Sub-Total	**22.4%**	**17.7%**	**80.1%**	**57.0%**	**40.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015 and Lichfields' adjustments

Table 4B: Future Convenience Goods Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Morrison's, East Hill, Oxted	38.0%	2.2%	4.4%	17.1%	10.0%	10.0%
Little Waitrose, Station Road East, Oxted	15.4%	0.5%	0.0%	0.7%	0.0%	10.0%
Sainsbury's Local, Station Road East, Oxted	4.9%	0.0%	0.3%	0.6%	0.0%	10.0%
Co-op, Station Road East, Oxted	2.9%	0.1%	0.0%	0.2%	0.0%	10.0%
Other convenience shops, Oxted	3.8%	0.0%	0.0%	0.0%	0.0%	10.0%
Zone 1 Sub-Total	**65.0%**	**2.8%**	**4.7%**	**18.6%**	**10.0%**	
Morrison's, Church Walk, Caterham	0.1%	18.9%	0.0%	2.4%	0.0%	15.0%
Waitrose, Station Avenue, Caterham	0.0%	11.8%	0.6%	1.2%	0.0%	10.0%
Tesco, Coulsdon Road, Caterham	0.0%	17.8%	0.2%	0.3%	0.0%	10.0%
Co-op, Croydon Road, Caterham	0.0%	1.2%	0.0%	0.2%	0.0%	10.0%
Proposed Lidl Caterham	0.0%	6.0%	0.2%	0.6%	0.0%	10.0%
Other convenience shops, Caterham/Caterham Hill	0.0%	2.6%	0.0%	0.0%	0.0%	10.0%
Sainsbury's, Warlingham	11.9%	18.0%	1.0%	3.2%	0.0%	30.0%
Other Warlingham	0.2%	3.3%	0.0%	0.0%	0.0%	10.0%
Whyteleafe	0.0%	0.5%	0.0%	0.0%	0.0%	10.0%
Zone 2 Sub-Total	**12.2%**	**80.1%**	**2.0%**	**7.9%**	**0.0%**	
Zone 3 - Lingfield	0.4%	0.0%	13.2%	3.1%	0.0%	5.0%
Zone 4 - Godstone/Smallfield	0.0%	0.4%	0.0%	13.7%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	50.0%	5.0%
Zone 3/4 Sub-Total	**0.4%**	**0.4%**	**13.2%**	**16.8%**	**50.0%**	
Tandridge District Total	**77.6%**	**83.3%**	**19.9%**	**43.3%**	**60.0%**	
Croydon	2.3%	12.0%	1.2%	1.7%	0.0%	n/a
East Grinstead	0.9%	0.0%	58.8%	9.9%	5.0%	n/a
Reigate and Banstead	0.4%	1.6%	0.0%	19.9%	20.0%	n/a
Sevenoaks	8.6%	0.0%	0.0%	0.0%	0.0%	n/a
Westerham	4.2%	0.3%	0.0%	0.0%	0.0%	n/a
Crawley	0.1%	0.0%	7.0%	3.7%	0.0%	n/a
Horley	0.3%	0.2%	3.1%	19.2%	15.0%	n/a
Other	5.6%	2.6%	10.0%	2.3%	0.0%	n/a
Other Sub-Total	**22.4%**	**16.7%**	**80.1%**	**56.7%**	**40.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015 and Lichfields' adjustments

Table 5: Base Year 2018 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2018	**42.85**	**87.83**	**26.88**	**43.97**	**0.00**		**201.53**
Morrison's, East Hill, Oxted	16.28	2.20	1.21	7.61	0.00	3.03	30.33
Little Waitrose, Station Road East, Oxted	6.60	0.44	0.00	0.31	0.00	0.82	8.16
Sainsbury's Local, Station Road East, Oxted	2.10	0.00	0.08	0.26	0.00	0.27	2.72
Co-op, Station Road East, Oxted	1.24	0.09	0.00	0.09	0.00	0.16	1.58
Other convenience shops, Oxted	1.63	0.00	0.00	0.00	0.00	0.18	1.81
Zone 1 Sub-Total	**27.86**	**2.72**	**1.29**	**8.27**	**0.00**	**4.46**	**44.59**
Morrison's, Church Walk, Caterham	0.04	18.18	0.00	1.06	0.00	3.40	22.68
Waitrose, Station Avenue, Caterham	0.00	10.63	0.16	0.53	0.00	1.26	12.57
Tesco, Coulsdon Road, Caterham	0.00	16.77	0.05	0.13	0.00	1.88	18.84
Co-op, Croydon Road, Caterham	0.00	1.05	0.00	0.09	0.00	0.13	1.27
Other convenience shops, Caterham/Caterham Hill	0.00	2.37	0.00	0.00	0.00	0.26	2.63
Sainsbury's, Warlingham	5.10	16.86	0.27	1.41	0.00	10.13	33.77
Other Warlingham	0.09	2.90	0.00	0.00	0.00	0.33	3.32
Whyteleafe	0.00	0.44	0.00	0.00	0.00	0.05	0.49
Zone 2 Sub-Total	**5.23**	**69.21**	**0.48**	**3.21**	**0.00**	**17.44**	**95.57**
Zone 3 - Lingfield	0.17	0.00	3.58	1.36	0.00	0.27	5.38
Zone 4 - Godstone/Smallfield	0.00	0.35	0.00	6.07	0.00	0.34	6.76
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3/4 Sub-Total	**0.17**	**0.35**	**3.58**	**7.43**	**0.00**	**0.61**	**12.13**
Tandridge District Total	**33.25**	**72.28**	**5.35**	**18.91**	**0.00**	**22.51**	**152.30**
Croydon	0.99	11.15	0.32	0.75	0.00	n/a	13.21
East Grinstead	0.39	0.00	15.81	4.40	0.00	n/a	20.59
Reigate and Banstead	0.17	1.49	0.00	8.79	0.00	n/a	10.46
Sevenoaks	3.69	0.00	0.00	0.00	0.00	n/a	3.69
Westerham	1.80	0.26	0.00	0.00	0.00	n/a	2.06
Crawley	0.04	0.00	1.88	1.63	0.00	n/a	3.55
Horley	0.13	0.18	0.83	8.49	0.00	n/a	9.62
Other	2.40	2.46	2.69	1.01	0.00	n/a	8.56
Other Sub-Total	**9.60**	**15.55**	**21.53**	**25.06**	**0.00**	**n/a**	**71.74**
TOTAL	**42.85**	**87.83**	**26.88**	**43.97**	**0.00**	**n/a**	**224.04**

Source: Table 3A and 4

Table 6: Convenience Goods Expenditure 2023 (£m)

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2023	**43.68**	**90.24**	**27.30**	**44.91**	**0.00**		**206.14**
Morrison's, East Hill, Oxted	16.60	1.99	1.20	7.68	0.00	3.05	30.52
Little Waitrose, Station Road East, Oxted	6.73	0.45	0.00	0.31	0.00	0.83	8.32
Sainsbury's Local, Station Road East, Oxted	2.14	0.00	0.08	0.27	0.00	0.28	2.77
Co-op, Station Road East, Oxted	1.27	0.09	0.00	0.09	0.00	0.16	1.61
Other convenience shops, Oxted	1.66	0.00	0.00	0.00	0.00	0.18	1.84
Zone 1 Sub-Total	**28.39**	**2.53**	**1.28**	**8.35**	**0.00**	**4.51**	**45.06**
Morrison's, Church Walk, Caterham	0.04	17.06	0.00	1.08	0.00	3.21	21.39
Waitrose, Station Avenue, Caterham	0.00	10.65	0.16	0.54	0.00	1.26	12.61
Tesco, Coulsdon Road, Caterham	0.00	16.06	0.05	0.13	0.00	1.81	18.06
Co-op, Croydon Road, Caterham	0.00	1.08	0.00	0.09	0.00	0.13	1.30
Proposed Lidl Caterham	0.00	5.41	0.05	0.27	0.00	0.64	6.38
Other convenience shops, Caterham/Caterham Hill	0.00	2.35	0.00	0.00	0.00	0.26	2.61
Sainsbury's, Warlingham	5.20	16.24	0.27	1.44	0.00	9.92	33.07
Other Warlingham	0.09	2.98	0.00	0.00	0.00	0.34	3.41
Whyteleafe	0.00	0.45	0.00	0.00	0.00	0.05	0.50
Zone 2 Sub-Total	**5.33**	**72.29**	**0.55**	**3.55**	**0.00**	**17.62**	**99.32**
Zone 3 - Lingfield	0.17	0.00	3.60	1.39	0.00	0.27	5.44
Zone 4 - Godstone/Smallfield	0.00	0.36	0.00	6.15	0.00	0.34	6.86
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 3/4 Sub-Total	**0.17**	**0.36**	**3.60**	**7.54**	**0.00**	**0.61**	**12.30**
Tandridge District Total	**33.90**	**75.17**	**5.43**	**19.44**	**0.00**	**22.74**	**156.68**
Croydon	1.00	10.83	0.33	0.76	0.00	n/a	12.92
East Grinstead	0.39	0.00	16.05	4.45	0.00	n/a	20.89
Reigate and Banstead	0.17	1.44	0.00	8.94	0.00	n/a	10.56
Sevenoaks	3.76	0.00	0.00	0.00	0.00	n/a	3.76
Westerham	1.83	0.27	0.00	0.00	0.00	n/a	2.11
Crawley	0.04	0.00	1.91	1.66	0.00	n/a	3.62
Horley	0.13	0.18	0.85	8.62	0.00	n/a	9.78
Other	2.45	2.35	2.73	1.03	0.00	n/a	8.56
Other Sub-Total	**9.78**	**15.07**	**21.87**	**25.46**	**0.00**	**n/a**	**72.19**
TOTAL	**43.68**	**90.24**	**27.30**	**44.91**	**0.00**	**n/a**	**228.87**

Source: Table 3A and 4B

Table 7A: Convenience Goods Expenditure 2028 (£m) - Baseline Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**44.12**	**91.50**	**27.53**	**45.40**	**3.26**		**211.81**
Morrison's, East Hill, Oxted	16.76	2.01	1.21	7.76	0.33	3.12	31.20
Little Waitrose, Station Road East, Oxted	6.79	0.46	0.00	0.32	0.00	0.84	8.41
Sainsbury's Local, Station Road East, Oxted	2.16	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.62
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.86
Zone 1 Sub-Total	**28.68**	**2.56**	**1.29**	**8.44**	**0.33**	**4.59**	**45.89**
Morrison's, Church Walk, Caterham	0.04	17.29	0.00	1.09	0.00	3.25	21.68
Waitrose, Station Avenue, Caterham	0.00	10.80	0.17	0.54	0.00	1.28	12.79
Tesco, Coulsdon Road, Caterham	0.00	16.29	0.06	0.14	0.00	1.83	18.31
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.32
Proposed Lidl Caterham	0.00	5.49	0.06	0.27	0.00	0.65	6.46
Other convenience shops, Caterham/Caterham Hill	0.00	2.38	0.00	0.00	0.00	0.26	2.64
Sainsbury's, Warlingham	5.25	16.47	0.28	1.45	0.00	10.05	33.50
Other Warlingham	0.09	3.02	0.00	0.00	0.00	0.35	3.45
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.38**	**73.29**	**0.55**	**3.59**	**0.00**	**17.85**	**100.66**
Zone 3 - Lingfield	0.18	0.00	3.63	1.41	0.00	0.27	5.49
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.22	0.00	0.35	6.93
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	1.63	0.09	1.72
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.63**	**7.63**	**1.63**	**0.71**	**14.14**
Tandridge District Total	**34.24**	**76.22**	**5.48**	**19.66**	**1.96**	**23.15**	**160.70**
Croydon	1.01	10.98	0.33	0.77	0.00	n/a	13.10
East Grinstead	0.40	0.00	16.19	4.49	0.16	n/a	21.24
Reigate and Banstead	0.18	1.46	0.00	9.03	0.65	n/a	11.33
Sevenoaks	3.79	0.00	0.00	0.00	0.00	n/a	3.79
Westerham	1.85	0.27	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.65
Horley	0.13	0.18	0.85	8.72	0.49	n/a	10.37
Other	2.47	2.38	2.75	1.04	0.00	n/a	8.65
Other Sub-Total	**9.88**	**15.28**	**22.05**	**25.74**	**1.31**	**n/a**	**74.26**
TOTAL	**44.12**	**91.50**	**27.53**	**45.40**	**3.26**	**n/a**	**234.96**

Source: Table 3A and 4B

Table 7B: Convenience Goods Expenditure 2028 (£m) - Medium Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**44.12**	**91.50**	**27.53**	**45.40**	**5.58**		**214.13**
Morrison's, East Hill, Oxted	16.76	2.01	1.21	7.76	0.56	3.15	31.46
Little Waitrose, Station Road East, Oxted	6.79	0.46	0.00	0.32	0.00	0.84	8.41
Sainsbury's Local, Station Road East, Oxted	2.16	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.62
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.86
Zone 1 Sub-Total	**28.68**	**2.56**	**1.29**	**8.44**	**0.56**	**4.61**	**46.15**
Morrison's, Church Walk, Caterham	0.04	17.29	0.00	1.09	0.00	3.25	21.68
Waitrose, Station Avenue, Caterham	0.00	10.80	0.17	0.54	0.00	1.28	12.79
Tesco, Coulsdon Road, Caterham	0.00	16.29	0.06	0.14	0.00	1.83	18.31
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.32
Proposed Lidl Caterham	0.00	5.49	0.06	0.27	0.00	0.65	6.46
Other convenience shops, Caterham/Caterham Hill	0.00	2.38	0.00	0.00	0.00	0.26	2.64
Sainsbury's, Warlingham	5.25	16.47	0.28	1.45	0.00	10.05	33.50
Other Warlingham	0.09	3.02	0.00	0.00	0.00	0.35	3.45
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.38**	**73.29**	**0.55**	**3.59**	**0.00**	**17.85**	**100.66**
Zone 3 - Lingfield	0.18	0.00	3.63	1.41	0.00	0.27	5.49
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.22	0.00	0.35	6.93
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	2.79	0.15	2.94
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.63**	**7.63**	**2.79**	**0.77**	**15.36**
Tandridge District Total	**34.24**	**76.22**	**5.48**	**19.66**	**3.35**	**23.23**	**162.17**
Croydon	1.01	10.98	0.33	0.77	0.00	n/a	13.10
East Grinstead	0.40	0.00	16.19	4.49	0.28	n/a	21.36
Reigate and Banstead	0.18	1.46	0.00	9.03	1.12	n/a	11.79
Sevenoaks	3.79	0.00	0.00	0.00	0.00	n/a	3.79
Westerham	1.85	0.27	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.65
Horley	0.13	0.18	0.85	8.72	0.84	n/a	10.72
Other	2.47	2.38	2.75	1.04	0.00	n/a	8.65
Other Sub-Total	**9.88**	**15.28**	**22.05**	**25.74**	**2.23**	**n/a**	**75.19**
TOTAL	**44.12**	**91.50**	**27.53**	**45.40**	**5.58**	**n/a**	**237.36**

Source: Table 3A and 4B

Table 7C: Convenience Goods Expenditure 2028 (£m) - High Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**44.12**	**91.50**	**27.53**	**45.40**	**8.57**		**217.12**
Morrison's, East Hill, Oxted	16.76	2.01	1.21	7.76	0.86	3.18	31.79
Little Waitrose, Station Road East, Oxted	6.79	0.46	0.00	0.32	0.00	0.84	8.41
Sainsbury's Local, Station Road East, Oxted	2.16	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.62
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.86
Zone 1 Sub-Total	**28.68**	**2.56**	**1.29**	**8.44**	**0.86**	**4.65**	**46.48**
Morrison's, Church Walk, Caterham	0.04	17.29	0.00	1.09	0.00	3.25	21.68
Waitrose, Station Avenue, Caterham	0.00	10.80	0.17	0.54	0.00	1.28	12.79
Tesco, Coulsdon Road, Caterham	0.00	16.29	0.06	0.14	0.00	1.83	18.31
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.32
Proposed Lidl Caterham	0.00	5.49	0.06	0.27	0.00	0.65	6.46
Other convenience shops, Caterham/Caterham Hill	0.00	2.38	0.00	0.00	0.00	0.26	2.64
Sainsbury's, Warlingham	5.25	16.47	0.28	1.45	0.00	10.05	33.50
Other Warlingham	0.09	3.02	0.00	0.00	0.00	0.35	3.45
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.38**	**73.29**	**0.55**	**3.59**	**0.00**	**17.85**	**100.66**
Zone 3 - Lingfield	0.18	0.00	3.63	1.41	0.00	0.27	5.49
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.22	0.00	0.35	6.93
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	4.28	0.23	4.51
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.63**	**7.63**	**4.28**	**0.85**	**16.94**
Tandridge District Total	**34.24**	**76.22**	**5.48**	**19.66**	**5.14**	**23.34**	**164.08**
Croydon	1.01	10.98	0.33	0.77	0.00	n/a	13.10
East Grinstead	0.40	0.00	16.19	4.49	0.43	n/a	21.51
Reigate and Banstead	0.18	1.46	0.00	9.03	1.71	n/a	12.39
Sevenoaks	3.79	0.00	0.00	0.00	0.00	n/a	3.79
Westerham	1.85	0.27	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.65
Horley	0.13	0.18	0.85	8.72	1.29	n/a	11.17
Other	2.47	2.38	2.75	1.04	0.00	n/a	8.65
Other Sub-Total	**9.88**	**15.28**	**22.05**	**25.74**	**3.43**	**n/a**	**76.39**
TOTAL	**44.12**	**91.50**	**27.53**	**45.40**	**8.57**	**n/a**	**240.46**

Source: Table 3A and 4B

Table 8A: Convenience Goods Expenditure 2033 (£m) - Baseline Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**44.25**	**91.79**	**27.59**	**45.54**	**8.71**		**217.88**
Morrison's, East Hill, Oxted	16.81	2.02	1.21	7.79	0.87	3.19	31.89
Little Waitrose, Station Road East, Oxted	6.81	0.46	0.00	0.32	0.00	0.84	8.44
Sainsbury's Local, Station Road East, Oxted	2.17	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.63
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.87
Zone 1 Sub-Total	**28.76**	**2.57**	**1.30**	**8.47**	**0.87**	**4.66**	**46.63**
Morrison's, Church Walk, Caterham	0.04	17.35	0.00	1.09	0.00	3.26	21.75
Waitrose, Station Avenue, Caterham	0.00	10.83	0.17	0.55	0.00	1.28	12.83
Tesco, Coulsdon Road, Caterham	0.00	16.34	0.06	0.14	0.00	1.84	18.37
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.33
Proposed Lidl Caterham	0.00	5.51	0.06	0.27	0.00	0.65	6.48
Other convenience shops, Caterham/Caterham Hill	0.00	2.39	0.00	0.00	0.00	0.27	2.65
Sainsbury's, Warlingham	5.27	16.52	0.28	1.46	0.00	10.08	33.60
Other Warlingham	0.09	3.03	0.00	0.00	0.00	0.35	3.46
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.40**	**73.52**	**0.55**	**3.60**	**0.00**	**17.90**	**100.97**
Zone 3 - Lingfield	0.18	0.00	3.64	1.41	0.00	0.28	5.51
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.24	0.00	0.35	6.95
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	4.36	0.23	4.59
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.64**	**7.65**	**4.36**	**0.85**	**17.05**
Tandridge District Total	**34.33**	**76.46**	**5.49**	**19.72**	**5.23**	**23.42**	**164.65**
Croydon	1.02	11.01	0.33	0.77	0.00	n/a	13.14
East Grinstead	0.40	0.00	16.22	4.51	0.44	n/a	21.57
Reigate and Banstead	0.18	1.47	0.00	9.06	1.74	n/a	12.45
Sevenoaks	3.81	0.00	0.00	0.00	0.00	n/a	3.81
Westerham	1.86	0.28	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.66
Horley	0.13	0.18	0.86	8.74	1.31	n/a	11.22
Other	2.48	2.39	2.76	1.05	0.00	n/a	8.67
Other Sub-Total	**9.91**	**15.33**	**22.10**	**25.82**	**3.49**	**n/a**	**76.65**
TOTAL	**44.25**	**91.79**	**27.59**	**45.54**	**8.71**	**n/a**	**241.30**

Source: Table 3A and 4B

Table 8B: Convenience Goods Expenditure 2033 (£m) - Medium Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**44.25**	**91.79**	**27.59**	**45.54**	**18.82**		**227.98**
Morrison's, East Hill, Oxted	16.81	2.02	1.21	7.79	1.88	3.30	33.02
Little Waitrose, Station Road East, Oxted	6.81	0.46	0.00	0.32	0.00	0.84	8.44
Sainsbury's Local, Station Road East, Oxted	2.17	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.63
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.87
Zone 1 Sub-Total	**28.76**	**2.57**	**1.30**	**8.47**	**1.88**	**4.78**	**47.75**
Morrison's, Church Walk, Caterham	0.04	17.35	0.00	1.09	0.00	3.26	21.75
Waitrose, Station Avenue, Caterham	0.00	10.83	0.17	0.55	0.00	1.28	12.83
Tesco, Coulsdon Road, Caterham	0.00	16.34	0.06	0.14	0.00	1.84	18.37
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.33
Proposed Lidl Caterham	0.00	5.51	0.06	0.27	0.00	0.65	6.48
Other convenience shops, Caterham/Caterham Hill	0.00	2.39	0.00	0.00	0.00	0.27	2.65
Sainsbury's, Warlingham	5.27	16.52	0.28	1.46	0.00	10.08	33.60
Other Warlingham	0.09	3.03	0.00	0.00	0.00	0.35	3.46
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.40**	**73.52**	**0.55**	**3.60**	**0.00**	**17.90**	**100.97**
Zone 3 - Lingfield	0.18	0.00	3.64	1.41	0.00	0.28	5.51
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.24	0.00	0.35	6.95
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	9.41	0.50	9.91
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.64**	**7.65**	**9.41**	**1.12**	**22.37**
Tandridge District Total	**34.33**	**76.46**	**5.49**	**19.72**	**11.29**	**23.80**	**171.09**
Croydon	1.02	11.01	0.33	0.77	0.00	n/a	13.14
East Grinstead	0.40	0.00	16.22	4.51	0.94	n/a	22.07
Reigate and Banstead	0.18	1.47	0.00	9.06	3.76	n/a	14.47
Sevenoaks	3.81	0.00	0.00	0.00	0.00	n/a	3.81
Westerham	1.86	0.28	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.66
Horley	0.13	0.18	0.86	8.74	2.82	n/a	12.74
Other	2.48	2.39	2.76	1.05	0.00	n/a	8.67
Other Sub-Total	**9.91**	**15.33**	**22.10**	**25.82**	**7.53**	**n/a**	**80.69**
TOTAL	**44.25**	**91.79**	**27.59**	**45.54**	**18.82**	**n/a**	**251.78**

Source: Table 3A and 4B

Table 8C: Convenience Goods Expenditure 2033 (£m) - High Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**44.25**	**91.79**	**27.59**	**45.54**	**29.21**		**238.38**
Morrison's, East Hill, Oxted	16.81	2.02	1.21	7.79	2.92	3.42	34.17
Little Waitrose, Station Road East, Oxted	6.81	0.46	0.00	0.32	0.00	0.84	8.44
Sainsbury's Local, Station Road East, Oxted	2.17	0.00	0.08	0.27	0.00	0.28	2.80
Co-op, Station Road East, Oxted	1.28	0.09	0.00	0.09	0.00	0.16	1.63
Other convenience shops, Oxted	1.68	0.00	0.00	0.00	0.00	0.19	1.87
Zone 1 Sub-Total	**28.76**	**2.57**	**1.30**	**8.47**	**2.92**	**4.89**	**48.91**
Morrison's, Church Walk, Caterham	0.04	17.35	0.00	1.09	0.00	3.26	21.75
Waitrose, Station Avenue, Caterham	0.00	10.83	0.17	0.55	0.00	1.28	12.83
Tesco, Coulsdon Road, Caterham	0.00	16.34	0.06	0.14	0.00	1.84	18.37
Co-op, Croydon Road, Caterham	0.00	1.10	0.00	0.09	0.00	0.13	1.33
Proposed Lidl Caterham	0.00	5.51	0.06	0.27	0.00	0.65	6.48
Other convenience shops, Caterham/Caterham Hill	0.00	2.39	0.00	0.00	0.00	0.27	2.65
Sainsbury's, Warlingham	5.27	16.52	0.28	1.46	0.00	10.08	33.60
Other Warlingham	0.09	3.03	0.00	0.00	0.00	0.35	3.46
Whyteleafe	0.00	0.46	0.00	0.00	0.00	0.05	0.51
Zone 2 Sub-Total	**5.40**	**73.52**	**0.55**	**3.60**	**0.00**	**17.90**	**100.97**
Zone 3 - Lingfield	0.18	0.00	3.64	1.41	0.00	0.28	5.51
Zone 4 - Godstone/Smallfield	0.00	0.37	0.00	6.24	0.00	0.35	6.95
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	14.61	0.77	15.38
Zone 3/4 Sub-Total	**0.18**	**0.37**	**3.64**	**7.65**	**14.61**	**1.39**	**27.84**
Tandridge District Total	**34.33**	**76.46**	**5.49**	**19.72**	**17.53**	**24.19**	**177.72**
Croydon	1.02	11.01	0.33	0.77	0.00	n/a	13.14
East Grinstead	0.40	0.00	16.22	4.51	1.46	n/a	22.59
Reigate and Banstead	0.18	1.47	0.00	9.06	5.84	n/a	16.55
Sevenoaks	3.81	0.00	0.00	0.00	0.00	n/a	3.81
Westerham	1.86	0.28	0.00	0.00	0.00	n/a	2.13
Crawley	0.04	0.00	1.93	1.68	0.00	n/a	3.66
Horley	0.13	0.18	0.86	8.74	4.38	n/a	14.30
Other	2.48	2.39	2.76	1.05	0.00	n/a	8.67
Other Sub-Total	**9.91**	**15.33**	**22.10**	**25.82**	**11.69**	**n/a**	**84.85**
TOTAL	**44.25**	**91.79**	**27.59**	**45.54**	**29.21**	**n/a**	**262.56**

Source: Table 3A and 4B

Table 9: Convenience Goods Floorspace and Benchmark Turnover 2018

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Morrison's, East Hill, Oxted	2,864	85%	2,434	£12,369	£30.11
Little Waitrose, Station Road East, Oxted	649	95%	617	£13,042	£8.04
Sainsbury's Local, Station Road East, Oxted	291	95%	276	£11,068	£3.06
Co-op, Station Road East, Oxted	405	95%	385	£10,298	£3.96
Other convenience shops, Oxted	300	100%	300	£5,000	£1.50
Zone 1 Sub-Total	**4,509**		**4,012**		**£46.67**
Morrison's, Church Walk, Caterham Valley	2,353	85%	2,000	£12,369	£24.74
Waitrose, Station Avenue, Caterham Valley	1,413	90%	1,272	£13,042	£16.59
Tesco, Coulsdon Road, Caterham	1,841	90%	1,657	£12,221	£20.25
Co-op, Croydon Road, Caterham Valley	318	95%	302	£10,298	£3.11
Co-op, Raglan Precinct, Caterham Hill	152	95%	144	£10,298	£1.49
Other convenience shops, Caterham/Caterham Hill	760	100%	760	£5,000	£3.80
Sainsbury's, Warlingham	3,938	80%	3,150	£11,068	£34.87
Co-op, Warlingham	204	95%	194	£10,298	£2.00
Other Warlingham	300	100%	300	£5,000	£1.50
Whyteleafe	180	100%	180	£5,000	£0.90
Zone 2 Sub-Total	**11,459**		**9,959**		**£109.24**
Co-op, Lingfield	156	95%	148	£10,298	£1.53
Other Lingfield	199	100%	199	£5,000	£1.00
Zone 3 Sub-Total	**355**		**347**		**£2.52**
Co-op, Smallfield	100	95%	95	£10,298	£0.98
Other Smallfield	100	100%	100	£5,000	£0.50
Godstone	48	100%	48	£5,000	£0.24
Zone 4 Sub-Total	**248**		**243**		**£1.72**
	16,571		**14,562**		**£160.15**

Source: StorePoint 2018 and Global Data 2017

Table 10A: Summary of Convenience Goods Expenditure 2018 to 2033 - Baseline Growth

	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	44.59	45.06	45.89	46.63
Zone 2 - Caterham/Warlingham/Whyteleafe	95.57	99.32	100.66	100.97
Zone 3 - Lingfield	5.38	5.44	5.49	5.51
Zone 4 - Godstone/Smallfield	6.76	6.86	6.93	6.95
Zone 4 - Garden Village	0.00	0.00	1.72	4.59
Total	**152.30**	**156.68**	**160.70**	**164.65**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	46.67	46.67	46.67	46.67
Zone 2 - Caterham/Warlingham/Whyteleafe *	109.24	115.30	115.30	115.30
Zone 3 - Lingfield	2.52	2.52	2.52	2.52
Zone 4 - Godstone/Smallfield	1.72	1.72	1.72	1.72
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**160.15**	**166.21**	**166.21**	**166.21**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	-2.08	-1.61	-0.78	-0.04
Zone 2 - Caterham/Warlingham/Whyteleafe	-13.66	-15.97	-14.63	-14.32
Zone 3 - Lingfield	2.86	2.92	2.97	2.98
Zone 4 - Godstone/Smallfield	5.04	5.14	5.21	5.24
Zone 4 - Garden Village	0.00	0.00	1.72	4.59
Total	**-7.85**	**-9.52**	**-5.51**	**-1.56**

Source: Tables 5 to 9

** includes proposed Lidl store in Caterham at 2023 - 700 sq.m net @ £8,661 psm (£6.06 million)*

Table 10B: Summary of Convenience Goods Expenditure 2018 to 2033 - Medium Growth

	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	44.59	45.06	46.15	47.75
Zone 2 - Caterham/Warlingham/Whyteleafe	95.57	99.32	100.66	100.97
Zone 3 - Lingfield	5.38	5.44	5.49	5.51
Zone 4 - Godstone/Smallfield	6.76	6.86	6.93	6.95
Zone 4 - Garden Village	0.00	0.00	2.94	9.91
Total	**152.30**	**156.68**	**162.17**	**171.09**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	46.67	46.67	46.67	46.67
Zone 2 - Caterham/Warlingham/Whyteleafe	109.24	115.30	115.30	115.30
Zone 3 - Lingfield	2.52	2.52	2.52	2.52
Zone 4 - Godstone/Smallfield	1.72	1.72	1.72	1.72
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**160.15**	**166.21**	**166.21**	**166.21**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	-2.08	-1.61	-0.53	1.08
Zone 2 - Caterham/Warlingham/Whyteleafe	-13.66	-15.97	-14.63	-14.32
Zone 3 - Lingfield	2.86	2.92	2.97	2.98
Zone 4 - Godstone/Smallfield	5.04	5.14	5.21	5.24
Zone 4 - Garden Village	0.00	0.00	2.94	9.91
Total	**-7.85**	**-9.52**	**-4.04**	**4.88**

Source: Tables 5 to 9

** includes proposed Lidl store in Caterham at 2023 - 700 sq.m net @ £8,661 psm (£6.06 million)*

Table 10C: Summary of Convenience Goods Expenditure 2018 to 2033 - High Growth

	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	44.59	45.06	46.48	48.91
Zone 2 - Caterham/Warlingham/Whyteleafe	95.57	99.32	100.66	100.97
Zone 3 - Lingfield	5.38	5.44	5.49	5.51
Zone 4 - Godstone/Smallfield	6.76	6.86	6.93	6.95
Zone 4 - Garden Village	0.00	0.00	4.51	15.38
Total	**152.30**	**156.68**	**164.08**	**177.72**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	46.67	46.67	46.67	46.67
Zone 2 - Caterham/Warlingham/Whyteleafe	109.24	115.30	115.30	115.30
Zone 3 - Lingfield	2.52	2.52	2.52	2.52
Zone 4 - Godstone/Smallfield	1.72	1.72	1.72	1.72
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**160.15**	**166.21**	**166.21**	**166.21**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	-2.08	-1.61	-0.19	2.23
Zone 2 - Caterham/Warlingham/Whyteleafe	-13.66	-15.97	-14.63	-14.32
Zone 3 - Lingfield	2.86	2.92	2.97	2.98
Zone 4 - Godstone/Smallfield	5.04	5.14	5.21	5.24
Zone 4 - Garden Village	0.00	0.00	4.51	15.38
Total	**-7.85**	**-9.52**	**-2.13**	**11.51**

Source: Tables 5 to 9

** includes proposed Lidl store in Caterham at 2023 - 700 sq.m net @ £8,661 psm (£6.06 million)*

Table 11A: Convenience Goods Floorspace Capacity - Baseline Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	-173	-134	-65	-4
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,139	-1,331	-1,220	-1,193
Zone 3 - Lingfield	238	243	248	249
Zone 4 - Godstone/Smallfield	420	428	434	436
Zone 4 - Garden Village	0	0	143	382
Total	**-654**	**-794**	**-459**	**-130**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	-248	-192	-93	-5
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,626	-1,901	-1,742	-1,705
Zone 3 - Lingfield	340	348	354	355
Zone 4 - Godstone/Smallfield	600	612	621	623
Zone 4 - Garden Village	0	0	205	546
Total	**-934**	**-1,134**	**-656**	**-186**

Table 11B: Convenience Goods Floorspace Capacity - Medium Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	-173	-134	-44	90
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,139	-1,331	-1,220	-1,193
Zone 3 - Lingfield	238	243	248	249
Zone 4 - Godstone/Smallfield	420	428	434	436
Zone 4 - Garden Village	0	0	245	825
Total	**-654**	**-794**	**-337**	**407**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	-248	-192	-63	129
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,626	-1,901	-1,742	-1,705
Zone 3 - Lingfield	340	348	354	355
Zone 4 - Godstone/Smallfield	600	612	621	623
Zone 4 - Garden Village	0	0	349	1,179
Total	**-934**	**-1,134**	**-481**	**582**

Table 11C: Convenience Goods Floorspace Capacity - High Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	-173	-134	-16	186
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,139	-1,331	-1,220	-1,193
Zone 3 - Lingfield	238	243	248	249
Zone 4 - Godstone/Smallfield	420	428	434	436
Zone 4 - Garden Village	0	0	376	1,281
Total	**-654**	**-794**	**-178**	**959**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	-248	-192	-23	266
Zone 2 - Caterham/Warlingham/Whyteleafe	-1,626	-1,901	-1,742	-1,705
Zone 3 - Lingfield	340	348	354	355
Zone 4 - Godstone/Smallfield	600	612	621	623
Zone 4 - Garden Village	0	0	537	1,830
Total	**-934**	**-1,134**	**-254**	**1,370**

Appendix 3: Comparison Goods Capacity

Table 1A: Study Area Population - Base Line Growth (300 dwellings per annum)

Zone	2016	2018	2023	2028	2033
Zone 1 - Oxted	18,018	18,228	18,699	18,910	18,949
Zone 2 - Caterham	39,685	40,510	41,896	42,519	42,633
Zone 3 - Lingfield	10,701	10,761	10,996	11,102	11,121
Zone 4 - SW Tandridge	18,296	18,701	19,224	19,459	19,502
Zone 4 - Garden Village	0	0	0	1,440	3,840
Total	**86,700**	**88,200**	**90,815**	**93,430**	**96,045**

Sources: *Tandridge DC - ONS 2014 based projections adjusted to reflect 300 dpa*
Tandridge DC - distribution based on expected location of development

Table 1B: Study Area Population - Medium Growth (470 dwellings per annum)

Zone	2016	2018	2023	2028	2033
Zone 1 - Oxted	18,018	18,228	18,699	18,910	18,949
Zone 2 - Caterham	39,685	40,510	41,896	42,519	42,633
Zone 3 - Lingfield	10,701	10,761	10,996	11,102	11,121
Zone 4 - SW Tandridge	18,296	18,701	19,224	19,459	19,502
Zone 4 - Garden Village	0	0	0	2,460	8,295
Total	**86,700**	**88,200**	**90,815**	**94,450**	**100,500**

Sources: *Tandridge DC - ONS 2014 based projections*
Tandridge DC - distribution based on expected location of development

Table 1C: Study Area Population - High Growth (645 dwellings per annum)

Zone	2016	2018	2023	2028	2033
Zone 1 - Oxted	18,018	18,228	18,699	18,910	18,949
Zone 2 - Caterham	39,685	40,510	41,896	42,519	42,633
Zone 3 - Lingfield	10,701	10,761	10,996	11,102	11,121
Zone 4 - SW Tandridge	18,296	18,701	19,224	19,459	19,502
Zone 4 - Garden Village	0	0	0	3,780	12,875
Total	**86,700**	**88,200**	**90,815**	**95,770**	**105,080**

Sources: *Tandridge DC - ONS 2014 based projections adjusted to reflect 645 dpa*
Tandridge DC - distribution based on expected location of development

Table 2: Comparison Goods Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Oxted	4,093	4,628	5,404	6,303
Zone 2 - Caterham	3,711	4,196	4,900	5,713
Zone 3 - Lingfield	4,278	4,837	5,649	6,588
Zone 4 - SW Tandridge	3,821	4,321	5,046	5,885
Zone 4 - Garden Village	3,882	4,390	5,127	5,980

Sources: *Experian Local Expenditure 2016 (2016 prices)*
Growth Rates: 0.9% in 2018, 2.1% in 2019 and 3.2% beyond 2019
Excludes Special Forms of Trading

Table 3A: Total Comparison Goods Expenditure (£m) - Baseline Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	74.61	86.54	102.19	119.43
Zone 2 - Caterham	150.33	175.80	208.34	243.56
Zone 3 - Lingfield	46.04	53.19	62.72	73.27
Zone 4 - SW Tandridge	71.46	83.07	98.19	114.77
Zone 4 - Garden Village	0.00	0.00	7.38	22.96
Total	**342.43**	**398.59**	**478.82**	**574.00**

Source: Tables 1A and 2

Table 3B: Total Comparison Goods Expenditure (£m) - Medium Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	74.61	86.54	102.19	119.43
Zone 2 - Caterham	150.33	175.80	208.34	243.56
Zone 3 - Lingfield	46.04	53.19	62.72	73.27
Zone 4 - SW Tandridge	71.46	83.07	98.19	114.77
Zone 4 - Garden Village	0.00	0.00	12.61	49.60
Total	**342.43**	**398.59**	**484.05**	**600.64**

Source: Tables 1B and 2

Table 3B: Total Comparison Goods Expenditure (£m) - High Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	74.61	86.54	102.19	119.43
Zone 2 - Caterham	150.33	175.80	208.34	243.56
Zone 3 - Lingfield	46.04	53.19	62.72	73.27
Zone 4 - SW Tandridge	71.46	83.07	98.19	114.77
Zone 4 - Garden Village	0.00	0.00	19.38	76.99
Total	**342.43**	**398.59**	**490.82**	**628.03**

Source: Tables 1B and 2

Table 4: Base Year Comparsion Goods Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Zone 1 - Oxted	23.7%	1.9%	1.0%	7.6%	5.0%	10.0%
Zone 2 - Caterham /Warlingham/Whyteleafe	3.1%	22.9%	0.6%	1.5%	0.0%	10.0%
Zone 3 - Lingfield	0.1%	0.0%	3.1%	0.4%	0.0%	10.0%
Zone 4 - Godstone	1.2%	0.5%	0.2%	2.8%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	10.0%	
Tandridge District Total	**28.1%**	**25.3%**	**4.9%**	**12.3%**	**15.0%**	
Central London	2.4%	4.1%	2.7%	1.2%	0.0%	n/a
Bromley	9.3%	1.1%	0.0%	0.6%	0.0%	n/a
Crawley	8.9%	3.2%	39.0%	37.5%	40.0%	n/a
Croydon	13.4%	40.7%	2.4%	6.1%	5.0%	n/a
East Grinstead	2.3%	0.1%	29.3%	4.8%	0.0%	n/a
Reigate and Banstead	8.6%	12.0%	2.5%	27.4%	30.0%	n/a
Sevenoaks/Westerham	7.8%	0.8%	0.3%	0.1%	0.0%	n/a
Other	19.2%	12.7%	18.9%	10.0%	10.0%	n/a
Other Sub-Total	**71.9%**	**74.7%**	**95.1%**	**87.7%**	**85.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015 and Lichfields' adjustments

Table 5: Base Year 2018 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2018	**74.61**	**150.33**	**46.04**	**71.46**	**0.00**		**342.43**
Zone 1 - Oxted	17.68	2.86	0.46	5.43	0.00	2.94	29.37
Zone 2 - Caterham /Warlingham/Whyteleafe	2.31	34.43	0.28	1.07	0.00	4.23	42.32
Zone 3 - Lingfield	0.07	0.00	1.43	0.29	0.00	0.20	1.99
Zone 4 - Godstone	0.90	0.75	0.09	2.00	0.00	0.20	3.94
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tandridge District Total	**20.96**	**38.03**	**2.26**	**8.79**	**0.00**	**7.56**	**77.61**
Central London	1.79	6.16	1.24	0.86	0.00	n/a	10.05
Bromley	6.94	1.65	0.00	0.43	0.00	n/a	9.02
Crawley	6.64	4.81	17.95	26.80	0.00	n/a	56.20
Croydon	10.00	61.19	1.10	4.36	0.00	n/a	76.65
East Grinstead	1.72	0.15	13.49	3.43	0.00	n/a	18.78
Reigate and Banstead	6.42	18.04	1.15	19.58	0.00	n/a	45.19
Sevenoaks/Westerham	5.82	1.20	0.14	0.07	0.00	n/a	7.23
Other	14.32	19.09	8.70	7.15	0.00	n/a	49.26
Other Sub-Total	**53.64**	**112.30**	**43.78**	**62.67**	**0.00**	**n/a**	**272.39**
TOTAL	**74.61**	**150.33**	**46.04**	**71.46**	**0.00**	**n/a**	**350.00**

Source: Table 3A and 4

Table 6: Future Post 2018 Comparsion Goods Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Zone 1 - Oxted	23.0%	1.6%	0.9%	7.5%	5.0%	10.0%
Zone 2 - Caterham /Warlingham/Whyteleafe	3.0%	20.3%	0.6%	1.5%	0.0%	10.0%
Zone 3 - Lingfield	0.1%	0.0%	3.1%	0.4%	0.0%	10.0%
Zone 4 - Godstone	1.2%	0.5%	0.2%	2.8%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	10.0%	5.0%
Tandridge District Total	**27.3%**	**22.4%**	**4.8%**	**12.2%**	**15.0%**	
Central London	2.2%	3.4%	2.7%	1.2%	0.0%	n/a
Bromley	9.0%	0.9%	0.0%	0.6%	0.0%	n/a
Crawley	8.6%	2.7%	38.8%	37.0%	40.0%	n/a
Croydon	16.1%	48.8%	2.9%	7.3%	5.0%	n/a
East Grinstead	2.2%	0.1%	29.2%	4.7%	0.0%	n/a
Reigate and Banstead	8.3%	10.2%	2.5%	27.0%	30.0%	n/a
Sevenoaks/Westerham	7.7%	0.7%	0.3%	0.1%	0.0%	n/a
Other	18.6%	10.8%	18.8%	9.9%	10.0%	n/a
Other Sub-Total	**72.7%**	**77.6%**	**95.2%**	**87.8%**	**85.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015 and NLP adjustments

Table 7: Future 2023 Comparison Goods Expenditure (£m)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2023	**86.54**	**175.80**	**53.19**	**83.07**	**0.00**		**398.59**
Zone 1 - Oxted	19.90	2.81	0.48	6.23	0.00	3.27	32.69
Zone 2 - Caterham /Warlingham/Whyteleafe	2.60	35.69	0.32	1.25	0.00	4.43	44.28
Zone 3 - Lingfield	0.09	0.00	1.65	0.33	0.00	0.23	2.30
Zone 4 - Godstone	1.04	0.88	0.11	2.33	0.00	0.23	4.58
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tandridge District Total	**23.62**	**39.38**	**2.55**	**10.13**	**0.00**	**8.16**	**83.85**
Central London	1.90	5.98	1.44	1.00	0.00	n/a	10.31
Bromley	7.79	1.58	0.00	0.50	0.00	n/a	9.87
Crawley	7.44	4.75	20.64	30.73	0.00	n/a	63.56
Croydon	13.93	85.79	1.54	6.06	0.00	n/a	107.33
East Grinstead	1.90	0.18	15.53	3.90	0.00	n/a	21.52
Reigate and Banstead	7.18	17.93	1.33	22.43	0.00	n/a	48.87
Sevenoaks/Westerham	6.66	1.23	0.16	0.08	0.00	n/a	8.14
Other	16.10	18.99	10.00	8.22	0.00	n/a	53.31
Other Sub-Total	**62.91**	**136.42**	**50.64**	**72.93**	**0.00**	**n/a**	**322.90**
TOTAL	**86.54**	**175.80**	**53.19**	**83.07**	**0.00**	**n/a**	**406.74**

Source: Table 3 and 6

Table 8A: Future 2028 Comparison Goods Expenditure (£m) - Baseline Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**102.19**	**208.34**	**62.72**	**98.19**	**7.38**		**478.82**
Zone 1 - Oxted	23.50	3.33	0.56	7.36	0.37	3.90	39.04
Zone 2 - Caterham /Warlingham/Whyteleafe	3.07	42.29	0.38	1.47	0.00	5.25	52.45
Zone 3 - Lingfield	0.10	0.00	1.94	0.39	0.00	0.27	2.71
Zone 4 - Godstone	1.23	1.04	0.13	2.75	0.00	0.27	5.41
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.74	0.00	0.74
Tandridge District Total	**27.90**	**46.67**	**3.01**	**11.98**	**1.11**	**9.69**	**100.35**
Central London	2.25	7.08	1.69	1.18	0.00	n/a	12.20
Bromley	9.20	1.88	0.00	0.59	0.00	n/a	11.66
Crawley	8.79	5.63	24.33	36.33	2.95	n/a	78.03
Croydon	16.45	101.67	1.82	7.17	0.37	n/a	127.48
East Grinstead	2.25	0.21	18.31	4.61	0.00	n/a	25.38
Reigate and Banstead	8.48	21.25	1.57	26.51	2.21	n/a	60.03
Sevenoaks/Westerham	7.87	1.46	0.19	0.10	0.00	n/a	9.61
Other	19.01	22.50	11.79	9.72	0.74	n/a	63.76
Other Sub-Total	**74.29**	**161.67**	**59.71**	**86.21**	**6.28**	**n/a**	**388.16**
TOTAL	**102.19**	**208.34**	**62.72**	**98.19**	**7.38**	**n/a**	**488.51**

Source: Table 3A and 6

Table 8B: Future 2028 Comparison Goods Expenditure (£m) - Medium Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**102.19**	**208.34**	**62.72**	**98.19**	**12.61**		**484.05**
Zone 1 - Oxted	23.50	3.33	0.56	7.36	0.63	3.93	39.33
Zone 2 - Caterham/Warlingham/Whyteleafe	3.07	42.29	0.38	1.47	0.00	5.25	52.45
Zone 3 - Lingfield	0.10	0.00	1.94	0.39	0.00	0.27	2.71
Zone 4 - Godstone	1.23	1.04	0.13	2.75	0.00	0.27	5.41
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	1.26	0.00	1.26
Tandridge District Total	**27.90**	**46.67**	**3.01**	**11.98**	**1.89**	**9.72**	**101.17**
Central London	2.25	7.08	1.69	1.18	0.00	n/a	12.20
Bromley	9.20	1.88	0.00	0.59	0.00	n/a	11.66
Crawley	8.79	5.63	24.33	36.33	5.04	n/a	80.12
Croydon	16.45	101.67	1.82	7.17	0.63	n/a	127.74
East Grinstead	2.25	0.21	18.31	4.61	0.00	n/a	25.38
Reigate and Banstead	8.48	21.25	1.57	26.51	3.78	n/a	61.60
Sevenoaks/Westerham	7.87	1.46	0.19	0.10	0.00	n/a	9.61
Other	19.01	22.50	11.79	9.72	1.26	n/a	64.28
Other Sub-Total	**74.29**	**161.67**	**59.71**	**86.21**	**10.72**	**n/a**	**392.60**
TOTAL	**102.19**	**208.34**	**62.72**	**98.19**	**12.61**	**n/a**	**493.77**

Source: Table 3B and 6

Table 8C: Future 2028 Comparison Goods Expenditure (£m) - High Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**102.19**	**208.34**	**62.72**	**98.19**	**19.38**		**490.82**
Zone 1 - Oxted	23.50	3.33	0.56	7.36	0.97	3.97	39.71
Zone 2 - Caterham/Warlingham/Whyteleafe	3.07	42.29	0.38	1.47	0.00	5.25	52.45
Zone 3 - Lingfield	0.10	0.00	1.94	0.39	0.00	0.27	2.71
Zone 4 - Godstone	1.23	1.04	0.13	2.75	0.00	0.27	5.41
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	1.94	0.00	1.94
Tandridge District Total	**27.90**	**46.67**	**3.01**	**11.98**	**2.91**	**9.76**	**102.22**
Central London	2.25	7.08	1.69	1.18	0.00	n/a	12.20
Bromley	9.20	1.88	0.00	0.59	0.00	n/a	11.66
Crawley	8.79	5.63	24.33	36.33	7.75	n/a	82.83
Croydon	16.45	101.67	1.82	7.17	0.97	n/a	128.08
East Grinstead	2.25	0.21	18.31	4.61	0.00	n/a	25.38
Reigate and Banstead	8.48	21.25	1.57	26.51	5.81	n/a	63.63
Sevenoaks/Westerham	7.87	1.46	0.19	0.10	0.00	n/a	9.61
Other	19.01	22.50	11.79	9.72	1.94	n/a	64.96
Other Sub-Total	**74.29**	**161.67**	**59.71**	**86.21**	**16.47**	**n/a**	**398.36**
TOTAL	**102.19**	**208.34**	**62.72**	**98.19**	**19.38**	**n/a**	**500.58**

Source: Table 3C and 6

Table 9A: Future 2033 Comparison Goods Expenditure (£m) - Baseline Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**119.43**	**243.56**	**73.27**	**114.77**	**22.96**		**574.00**
Zone 1 - Oxted	27.47	3.90	0.66	8.61	1.15	4.64	46.42
Zone 2 - Caterham /Warlingham/Whyteleafe	3.58	49.44	0.44	1.72	0.00	6.13	61.32
Zone 3 - Lingfield	0.12	0.00	2.27	0.46	0.00	0.32	3.17
Zone 4 - Godstone	1.43	1.22	0.15	3.21	0.00	0.32	6.33
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	2.30	0.00	2.30
Tandridge District Total	**32.61**	**54.56**	**3.52**	**14.00**	**3.44**	**11.41**	**119.53**
Central London	2.63	8.28	1.98	1.38	0.00	n/a	14.26
Bromley	10.75	2.19	0.00	0.69	0.00	n/a	13.63
Crawley	10.27	6.58	28.43	42.46	9.19	n/a	96.93
Croydon	19.23	118.86	2.12	8.38	1.15	n/a	149.74
East Grinstead	2.63	0.24	21.39	5.39	0.00	n/a	29.66
Reigate and Banstead	9.91	24.84	1.83	30.99	6.89	n/a	74.46
Sevenoaks/Westerham	9.20	1.70	0.22	0.11	0.00	n/a	11.24
Other	22.21	26.30	13.77	11.36	2.30	n/a	75.95
Other Sub-Total	**86.83**	**189.00**	**69.75**	**100.77**	**19.52**	**n/a**	**465.87**
TOTAL	**119.43**	**243.56**	**73.27**	**114.77**	**22.96**	**n/a**	**585.40**

Source: Table 3A and 6

Table 9B: Future 2033 Comparison Goods Expenditure (£m) - Medium Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**119.43**	**243.56**	**73.27**	**114.77**	**49.60**		**600.64**
Zone 1 - Oxted	27.47	3.90	0.66	8.61	2.48	4.79	47.90
Zone 2 - Caterham/Warlingham/Whyteleafe	3.58	49.44	0.44	1.72	0.00	6.13	61.32
Zone 3 - Lingfield	0.12	0.00	2.27	0.46	0.00	0.32	3.17
Zone 4 - Godstone	1.43	1.22	0.15	3.21	0.00	0.32	6.33
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	4.96	0.00	4.96
Tandridge District Total	**32.61**	**54.56**	**3.52**	**14.00**	**7.44**	**11.56**	**123.68**
Central London	2.63	8.28	1.98	1.38	0.00	n/a	14.26
Bromley	10.75	2.19	0.00	0.69	0.00	n/a	13.63
Crawley	10.27	6.58	28.43	42.46	19.84	n/a	107.58
Croydon	19.23	118.86	2.12	8.38	2.48	n/a	151.07
East Grinstead	2.63	0.24	21.39	5.39	0.00	n/a	29.66
Reigate and Banstead	9.91	24.84	1.83	30.99	14.88	n/a	82.46
Sevenoaks/Westerham	9.20	1.70	0.22	0.11	0.00	n/a	11.24
Other	22.21	26.30	13.77	11.36	4.96	n/a	78.62
Other Sub-Total	**86.83**	**189.00**	**69.75**	**100.77**	**42.16**	**n/a**	**488.51**
TOTAL	**119.43**	**243.56**	**73.27**	**114.77**	**49.60**	**n/a**	**612.19**

Source: Table 3B and 6

Table 9C: Future 2033 Comparison Goods Expenditure (£m) - High Growth

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**119.43**	**243.56**	**73.27**	**114.77**	**76.99**		**628.03**
Zone 1 - Oxted	27.47	3.90	0.66	8.61	3.85	4.94	49.43
Zone 2 - Caterham/Warlingham/Whyteleafe	3.58	49.44	0.44	1.72	0.00	6.13	61.32
Zone 3 - Lingfield	0.12	0.00	2.27	0.46	0.00	0.32	3.17
Zone 4 - Godstone	1.43	1.22	0.15	3.21	0.00	0.32	6.33
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	7.70	0.00	7.70
Tandridge District Total	**32.61**	**54.56**	**3.52**	**14.00**	**11.55**	**11.71**	**127.94**
Central London	2.63	8.28	1.98	1.38	0.00	n/a	14.26
Bromley	10.75	2.19	0.00	0.69	0.00	n/a	13.63
Crawley	10.27	6.58	28.43	42.46	30.80	n/a	118.54
Croydon	19.23	118.86	2.12	8.38	3.85	n/a	152.44
East Grinstead	2.63	0.24	21.39	5.39	0.00	n/a	29.66
Reigate and Banstead	9.91	24.84	1.83	30.99	23.10	n/a	90.67
Sevenoaks/Westerham	9.20	1.70	0.22	0.11	0.00	n/a	11.24
Other	22.21	26.30	13.77	11.36	7.70	n/a	81.36
Other Sub-Total	**86.83**	**189.00**	**69.75**	**100.77**	**65.44**	**n/a**	**511.79**
TOTAL	**119.43**	**243.56**	**73.27**	**114.77**	**76.99**	**n/a**	**639.73**

Source: Table 3C and 6

Table 10A: Summary of Comparision Goods Expenditure - Baseline Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	29.37	32.69	39.04	46.42
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	44.28	52.45	61.32
Zone 3 - Lingfield	1.99	2.30	2.71	3.17
Zone 4 - Godstone	3.94	4.58	5.41	6.33
Zone 4 - Garden Village	0.00	0.00	0.74	2.30
Total	**77.61**	**83.85**	**100.35**	**119.53**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	29.37	32.29	36.04	40.18
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	46.54	51.94	57.91
Zone 3 - Lingfield	1.99	2.18	2.44	2.72
Zone 4 - Godstone	3.94	4.33	4.83	5.39
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**77.61**	**85.34**	**95.25**	**106.19**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.40	3.00	6.24
Zone 2 - Caterham / Warlingham/Whyteleafe	0.00	-2.26	0.52	3.41
Zone 3 - Lingfield	0.00	0.11	0.27	0.45
Zone 4 - Godstone	0.00	0.25	0.58	0.94
Zone 4 - Garden Village	0.00	0.00	0.74	2.30
Total	**0.00**	**-1.50**	**5.11**	**13.34**

Source: Tables 5A to 9A

Table 10B: Summary of Comparision Goods Expenditure - Medium Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	29.37	32.69	39.33	47.90
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	44.28	52.45	61.32
Zone 3 - Lingfield	1.99	2.30	2.71	3.17
Zone 4 - Godstone	3.94	4.58	5.41	6.33
Zone 4 - Garden Village	0.00	0.00	1.26	4.96
Total	**77.61**	**83.85**	**101.17**	**123.68**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	29.37	32.29	36.04	40.18
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	46.54	51.94	57.91
Zone 3 - Lingfield	1.99	2.18	2.44	2.72
Zone 4 - Godstone	3.94	4.33	4.83	5.39
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**77.61**	**85.34**	**95.25**	**106.19**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.40	3.29	7.72
Zone 2 - Caterham / Warlingham/Whyteleafe	0.00	-2.26	0.52	3.41
Zone 3 - Lingfield	0.00	0.11	0.27	0.45
Zone 4 - Godstone	0.00	0.25	0.58	0.94
Zone 4 - Garden Village	0.00	0.00	1.26	4.96
Total	**0.00**	**-1.50**	**5.92**	**17.48**

Source: Tables 5B to 9B

Table 10C: Summary of Comparision Goods Expenditure - High Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	29.37	32.69	39.71	49.43
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	44.28	52.45	61.32
Zone 3 - Lingfield	1.99	2.30	2.71	3.17
Zone 4 - Godstone	3.94	4.58	5.41	6.33
Zone 4 - Garden Village	0.00	0.00	1.94	7.70
Total	**77.61**	**83.85**	**102.22**	**127.94**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	29.37	32.29	36.04	40.18
Zone 2 - Caterham / Warlingham/Whyteleafe	42.32	46.54	51.94	57.91
Zone 3 - Lingfield	1.99	2.18	2.44	2.72
Zone 4 - Godstone	3.94	4.33	4.83	5.39
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**77.61**	**85.34**	**95.25**	**106.19**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.40	3.67	9.24
Zone 2 - Caterham / Warlingham/Whyteleafe	0.00	-2.26	0.52	3.41
Zone 3 - Lingfield	0.00	0.11	0.27	0.45
Zone 4 - Godstone	0.00	0.25	0.58	0.94
Zone 4 - Garden Village	0.00	0.00	1.94	7.70
Total	**0.00**	**-1.50**	**6.97**	**21.74**

Source: Tables 5 to 9C

Table 11A: Comparison Goods Floorspace Capacity - Baseline Growth

Centre	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	6,000	6,598	7,364	8,210
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	0	61	407	760
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-343	70	416
Zone 3 - Lingfield	0	17	37	55
Zone 4 - Godstone	0	38	79	115
Zone 4 - Garden Village	0	0	100	280
Total	**0**	**-227**	**694**	**1,625**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	0	81	543	1,014
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-457	93	554
Zone 3 - Lingfield	0	23	49	73
Zone 4 - Godstone	0	50	105	153
Zone 4 - Garden Village	0	0	134	373
Total	**0**	**-303**	**925**	**2,166**

Table 11B: Comparison Goods Floorspace Capacity - Medium Growth

Centre	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	6,000	6,598	7,364	8,210
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	0	61	447	941
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-343	70	416
Zone 3 - Lingfield	0	17	37	55
Zone 4 - Godstone	0	38	79	115
Zone 4 - Garden Village	0	0	171	604
Total	**0**	**-227**	**804**	**2,129**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	0	81	596	1,254
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-457	93	554
Zone 3 - Lingfield	0	23	49	73
Zone 4 - Godstone	0	50	105	153
Zone 4 - Garden Village	0	0	228	806
Total	**0**	**-303**	**1,072**	**2,839**

Table 11C: Comparison Goods Floorspace Capacity - High Growth

Centre	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	6,000	6,598	7,364	8,210
Floorspace Requirement (sq.m net)				
Zone 1 - Oxted	0	61	498	1,126
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-343	70	416
Zone 3 - Lingfield	0	17	37	55
Zone 4 - Godstone	0	38	79	115
Zone 4 - Garden Village	0	0	263	938
Total	**0**	**-227**	**947**	**2,648**
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	0	81	664	1,501
Zone 2 - Caterham / Warlingham/Whyteleafe	0	-457	93	554
Zone 3 - Lingfield	0	23	49	73
Zone 4 - Godstone	0	50	105	153
Zone 4 - Garden Village	0	0	351	1,250
Total	**0**	**-303**	**1,263**	**3,531**

Appendix 4: Food/Beverage Capacity

Table 2: Food & Beverage Expenditure per person (£)

Zone	2018	2023	2028	2033
Zone 1 - Oxted	1,379	1,452	1,540	1,634
Zone 2 - Caterham	1,298	1,366	1,449	1,538
Zone 3 - Lingfield	1,368	1,440	1,527	1,621
Zone 4 - SW Tandridge	1,235	1,301	1,380	1,464
Zone 4 - Garden Village	1,310	1,380	1,464	1,553

Sources: *Experian Local Expenditure 2013 (2013 prices)*
Growth Rates: 2.1% 2013-2014, 2.8% 2014-2015 and 1.3% p.a. from 2015

Table 3A: Total Food & Beverage Expenditure (£m) - Baseline Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	25.14	27.15	29.12	30.96
Zone 2 - Caterham	52.58	57.23	61.61	65.57
Zone 3 - Lingfield	14.72	15.83	16.95	18.03
Zone 4 - SW Tandridge	23.10	25.01	26.85	28.55
Zone 4 - Garden Village	0.00	0.00	2.11	5.96
Total	**115.54**	**125.23**	**136.65**	**149.07**

Source: Tables 1A and 2

Table 3B: Total Food & Beverage Expenditure (£m) - Medium Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	25.14	27.15	29.12	30.96
Zone 2 - Caterham	52.58	57.23	61.61	65.57
Zone 3 - Lingfield	14.72	15.83	16.95	18.03
Zone 4 - SW Tandridge	23.10	25.01	26.85	28.55
Zone 4 - Garden Village	0.00	0.00	3.60	12.88
Total	**115.54**	**125.23**	**138.14**	**155.99**

Source: Tables 1B and 2

Table 3C: Total Food & Beverage Expenditure (£m) - High Growth

Zone	2018	2023	2028	2033
Zone 1 - Oxted	25.14	27.15	29.12	30.96
Zone 2 - Caterham	52.58	57.23	61.61	65.57
Zone 3 - Lingfield	14.72	15.83	16.95	18.03
Zone 4 - SW Tandridge	23.10	25.01	26.85	28.55
Zone 4 - Garden Village	0.00	0.00	5.53	19.99
Total	**115.54**	**125.23**	**140.07**	**163.11**

Source: Tables 1C and 2

Table 4: Base Year 2018 Food and Beverage Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Zone 1 - Oxted	49.9%	3.2%	2.8%	12.0%	15.0%	10.0%
Zone 1 - Other	4.9%	0.3%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Caterham	0.0%	27.4%	0.0%	0.2%	0.0%	10.0%
Zone 2 - Warlingham	2.2%	16.8%	0.0%	0.4%	0.0%	5.0%
Zone 2 - Whyteleafe	0.0%	5.1%	0.0%	0.2%	0.0%	5.0%
Zone 2 - Other	0.2%	2.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Lingfield	5.2%	0.7%	30.6%	5.9%	0.0%	10.0%
Zone 3 - Other	0.0%	0.0%	10.3%	0.9%	0.0%	5.0%
Zone 4 - SW Tandridge	2.3%	6.4%	5.3%	32.1%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	40.0%	5.0%
Tandridge District Total	**64.7%**	**61.9%**	**49.0%**	**51.7%**	**55.0%**	
Central London	5.2%	10.1%	5.1%	5.5%	5.0%	n/a
Croydon	0.4%	10.9%	0.0%	0.0%	0.0%	n/a
Crawley	1.0%	0.2%	9.6%	2.3%	0.0%	n/a
East Grinstead	0.4%	0.0%	14.5%	4.0%	0.0%	n/a
Reigate and Banstead	0.4%	6.9%	0.0%	23.5%	25.0%	n/a
Sevenoaks	5.4%	0.2%	0.0%	0.0%	0.0%	n/a
Westerham	7.9%	0.2%	0.6%	0.4%	0.0%	n/a
Other	14.6%	9.6%	21.2%	12.6%	15.0%	n/a
Other Sub-Total	**35.3%**	**38.1%**	**51.0%**	**48.3%**	**45.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015

Table 5: Base Year 2018 Food & Beverage Expenditure (£m)

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2018	**25.14**	**52.58**	**14.72**	**23.10**	**0.00**		**115.54**
Zone 1 - Oxted	12.54	1.68	0.41	2.77	0.00	1.93	19.34
Zone 1 - Other	1.23	0.16	0.00	0.00	0.00	0.07	1.46
Zone 2 - Caterham	0.00	14.41	0.00	0.05	0.00	1.61	16.06
Zone 2 - Warlingham	0.55	8.83	0.00	0.09	0.00	0.50	9.98
Zone 2 - Whyteleafe	0.00	2.68	0.00	0.05	0.00	0.14	2.87
Zone 2 - Other	0.05	1.05	0.00	0.00	0.00	0.06	1.16
Zone 3 - Lingfield	1.31	0.37	4.50	1.36	0.00	0.84	8.38
Zone 3 - Other	0.00	0.00	1.52	0.21	0.00	0.09	1.81
Zone 4 - SW Tandridge	0.58	3.37	0.78	7.41	0.00	0.64	12.78
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tandridge District Total	**16.26**	**32.55**	**7.21**	**11.94**	**0.00**	**5.88**	**73.85**
Central London	1.31	5.31	0.75	1.27	0.00	n/a	8.64
Croydon	0.10	5.73	0.00	0.00	0.00	n/a	5.83
Crawley	0.25	0.11	1.41	0.53	0.00	n/a	2.30
East Grinstead	0.10	0.00	2.13	0.92	0.00	n/a	3.16
Reigate and Banstead	0.10	3.63	0.00	5.43	0.00	n/a	9.16
Sevenoaks	1.36	0.11	0.00	0.00	0.00	n/a	1.46
Westerham	1.99	0.11	0.09	0.09	0.00	n/a	2.27
Other	3.67	5.05	3.12	2.91	0.00	n/a	14.75
Other Sub-Total	**8.87**	**20.03**	**7.51**	**11.16**	**0.00**	**n/a**	**47.57**
TOTAL	**25.14**	**52.58**	**14.72**	**23.10**	**0.00**	**n/a**	**121.42**

Source: Table 3A and 4

Table 6: Future Post 2018 Food and Beverage Market Shares (%)

Centre	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	% Inflow
Zone 1 - Oxted	49.3%	2.9%	2.8%	12.0%	15.0%	10.0%
Zone 1 - Other	4.9%	0.3%	0.0%	0.0%	0.0%	5.0%
Zone 2 - Caterham	0.0%	24.2%	0.0%	0.2%	0.0%	10.0%
Zone 2 - Warlingham	2.2%	16.8%	0.0%	0.4%	0.0%	5.0%
Zone 2 - Whyteleafe	0.0%	5.1%	0.0%	0.2%	0.0%	5.0%
Zone 2 - Other	0.2%	2.0%	0.0%	0.0%	0.0%	5.0%
Zone 3 - Lingfield	5.2%	0.7%	30.6%	5.9%	0.0%	10.0%
Zone 3 - Other	0.0%	0.0%	10.3%	0.9%	0.0%	5.0%
Zone 4 - SW Tandridge	2.3%	6.4%	5.3%	32.1%	0.0%	5.0%
Zone 4 - Garden Village	0.0%	0.0%	0.0%	0.0%	40.0%	
Tandridge District Total	**64.1%**	**58.4%**	**49.0%**	**51.7%**	**55.0%**	
Central London	5.2%	9.1%	5.1%	5.5%	5.0%	n/a
Croydon	1.0%	17.4%	0.0%	0.0%	0.0%	n/a
Crawley	1.0%	0.2%	9.6%	2.3%	0.0%	n/a
East Grinstead	0.4%	0.0%	14.5%	4.0%	0.0%	n/a
Reigate and Banstead	0.4%	6.2%	0.0%	23.5%	25.0%	n/a
Sevenoaks	5.4%	0.2%	0.0%	0.0%	0.0%	n/a
Westerham	7.9%	0.2%	0.6%	0.4%	0.0%	n/a
Other	14.6%	8.3%	21.2%	12.6%	15.0%	n/a
Other Sub-Total	**35.9%**	**41.6%**	**51.0%**	**48.3%**	**45.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey June 2015 and NLP adjustments

Table 7: Food & Beverage Expenditure 2023 (£m)

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2023	**27.15**	**57.23**	**15.83**	**25.01**	**0.00**		**125.23**
Zone 1 - Oxted	13.55	1.83	0.44	3.00	0.00	2.09	20.92
Zone 1 - Other	1.33	0.17	0.00	0.00	0.00	0.08	1.58
Zone 2 - Caterham	0.00	15.68	0.00	0.05	0.00	1.75	17.48
Zone 2 - Warlingham	0.60	9.61	0.00	0.10	0.00	0.54	10.85
Zone 2 - Whyteleafe	0.00	2.92	0.00	0.05	0.00	0.16	3.12
Zone 2 - Other	0.05	1.14	0.00	0.00	0.00	0.06	1.26
Zone 3 - Lingfield	1.41	0.40	4.85	1.48	0.00	0.90	9.04
Zone 3 - Other	0.00	0.00	1.63	0.23	0.00	0.10	1.95
Zone 4 - SW Tandridge	0.62	3.66	0.84	8.03	0.00	0.69	13.85
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tandridge District Total	**17.57**	**35.43**	**7.76**	**12.93**	**0.00**	**6.37**	**80.06**
Central London	1.41	5.78	0.81	1.38	0.00	n/a	9.38
Croydon	0.11	6.24	0.00	0.00	0.00	n/a	6.35
Crawley	0.27	0.11	1.52	0.58	0.00	n/a	2.48
East Grinstead	0.11	0.00	2.30	1.00	0.00	n/a	3.41
Reigate and Banstead	0.11	3.95	0.00	5.88	0.00	n/a	9.93
Sevenoaks	1.47	0.11	0.00	0.00	0.00	n/a	1.58
Westerham	2.14	0.11	0.10	0.10	0.00	n/a	2.45
Other	3.96	5.49	3.36	3.15	0.00	n/a	15.97
Other Sub-Total	**9.58**	**21.80**	**8.08**	**12.08**	**0.00**	**n/a**	**51.54**
TOTAL	**27.15**	**57.23**	**15.83**	**25.01**	**0.00**	**n/a**	**131.60**

Source: Table 3A and 6

Table 8A: Food & Beverage Expenditure 2028 (£m) - Baseline Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**29.12**	**61.61**	**16.95**	**26.85**	**2.11**		**136.65**
Zone 1 - Oxted	14.53	1.97	0.47	3.22	0.32	2.28	22.80
Zone 1 - Other	1.43	0.18	0.00	0.00	0.00	0.08	1.70
Zone 2 - Caterham	0.00	16.88	0.00	0.05	0.00	1.88	18.82
Zone 2 - Warlingham	0.64	10.35	0.00	0.11	0.00	0.58	11.68
Zone 2 - Whyteleafe	0.00	3.14	0.00	0.05	0.00	0.17	3.36
Zone 2 - Other	0.06	1.23	0.00	0.00	0.00	0.07	1.36
Zone 3 - Lingfield	1.51	0.43	5.19	1.58	0.00	0.97	9.69
Zone 3 - Other	0.00	0.00	1.75	0.24	0.00	0.10	2.09
Zone 4 - SW Tandridge	0.67	3.94	0.90	8.62	0.00	0.74	14.88
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	0.84	0.04	0.89
Tandridge District Total	**18.84**	**38.14**	**8.31**	**13.88**	**1.16**	**6.93**	**87.26**
Central London	1.51	6.22	0.86	1.48	0.11	n/a	10.18
Croydon	0.12	6.72	0.00	0.00	0.00	n/a	6.83
Crawley	0.29	0.12	1.63	0.62	0.00	n/a	2.66
East Grinstead	0.12	0.00	2.46	1.07	0.00	n/a	3.65
Reigate and Banstead	0.12	4.25	0.00	6.31	0.53	n/a	11.21
Sevenoaks	1.57	0.12	0.00	0.00	0.00	n/a	1.70
Westerham	2.30	0.12	0.10	0.11	0.00	n/a	2.63
Other	4.25	5.91	3.59	3.38	0.32	n/a	17.46
Other Sub-Total	**10.28**	**23.47**	**8.65**	**12.97**	**0.95**	**n/a**	**56.32**
TOTAL	**29.12**	**61.61**	**16.95**	**26.85**	**2.11**	**n/a**	**143.57**

Source: Table 3A and 6

Table 8B: Food & Beverage Expenditure 2028 (£m) - Medium Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**29.12**	**61.61**	**16.95**	**26.85**	**3.60**		**138.14**
Zone 1 - Oxted	14.53	1.97	0.47	3.22	0.54	2.30	23.05
Zone 1 - Other	1.43	0.18	0.00	0.00	0.00	0.08	1.70
Zone 2 - Caterham	0.00	16.88	0.00	0.05	0.00	1.88	18.82
Zone 2 - Warlingham	0.64	10.35	0.00	0.11	0.00	0.58	11.68
Zone 2 - Whyteleafe	0.00	3.14	0.00	0.05	0.00	0.17	3.36
Zone 2 - Other	0.06	1.23	0.00	0.00	0.00	0.07	1.36
Zone 3 - Lingfield	1.51	0.43	5.19	1.58	0.00	0.97	9.69
Zone 3 - Other	0.00	0.00	1.75	0.24	0.00	0.10	2.09
Zone 4 - SW Tandridge	0.67	3.94	0.90	8.62	0.00	0.74	14.88
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	1.44	0.08	1.52
Tandridge District Total	**18.84**	**38.14**	**8.31**	**13.88**	**1.98**	**6.98**	**88.13**
Central London	1.51	6.22	0.86	1.48	0.18	n/a	10.26
Croydon	0.12	6.72	0.00	0.00	0.00	n/a	6.83
Crawley	0.29	0.12	1.63	0.62	0.00	n/a	2.66
East Grinstead	0.12	0.00	2.46	1.07	0.00	n/a	3.65
Reigate and Banstead	0.12	4.25	0.00	6.31	0.90	n/a	11.58
Sevenoaks	1.57	0.12	0.00	0.00	0.00	n/a	1.70
Westerham	2.30	0.12	0.10	0.11	0.00	n/a	2.63
Other	4.25	5.91	3.59	3.38	0.54	n/a	17.68
Other Sub-Total	**10.28**	**23.47**	**8.65**	**12.97**	**1.62**	**n/a**	**56.99**
TOTAL	**29.12**	**61.61**	**16.95**	**26.85**	**3.60**	**n/a**	**145.12**

Source: Table 3B and 6

Table 8C: Food & Beverage Expenditure 2028 (£m) - High Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2028	**29.12**	**61.61**	**16.95**	**26.85**	**5.53**		**140.07**
Zone 1 - Oxted	14.53	1.97	0.47	3.22	0.83	2.34	23.37
Zone 1 - Other	1.43	0.18	0.00	0.00	0.00	0.08	1.70
Zone 2 - Caterham	0.00	16.88	0.00	0.05	0.00	1.88	18.82
Zone 2 - Warlingham	0.64	10.35	0.00	0.11	0.00	0.58	11.68
Zone 2 - Whyteleafe	0.00	3.14	0.00	0.05	0.00	0.17	3.36
Zone 2 - Other	0.06	1.23	0.00	0.00	0.00	0.07	1.36
Zone 3 - Lingfield	1.51	0.43	5.19	1.58	0.00	0.97	9.69
Zone 3 - Other	0.00	0.00	1.75	0.24	0.00	0.10	2.09
Zone 4 - SW Tandridge	0.67	3.94	0.90	8.62	0.00	0.74	14.88
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	2.21	0.12	2.33
Tandridge District Total	**18.84**	**38.14**	**8.31**	**13.88**	**3.04**	**7.06**	**89.27**
Central London	1.51	6.22	0.86	1.48	0.28	n/a	10.36
Croydon	0.12	6.72	0.00	0.00	0.00	n/a	6.83
Crawley	0.29	0.12	1.63	0.62	0.00	n/a	2.66
East Grinstead	0.12	0.00	2.46	1.07	0.00	n/a	3.65
Reigate and Banstead	0.12	4.25	0.00	6.31	1.38	n/a	12.06
Sevenoaks	1.57	0.12	0.00	0.00	0.00	n/a	1.70
Westerham	2.30	0.12	0.10	0.11	0.00	n/a	2.63
Other	4.25	5.91	3.59	3.38	0.83	n/a	17.97
Other Sub-Total	**10.28**	**23.47**	**8.65**	**12.97**	**2.49**	**n/a**	**57.86**
TOTAL	**29.12**	**61.61**	**16.95**	**26.85**	**5.53**	**n/a**	**147.13**

Source: Table 3C and 6

Table 9A: Food & Beverage Expenditure 2033 (£m) - Baseline Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**30.96**	**65.57**	**18.03**	**28.55**	**5.96**		**149.07**
Zone 1 - Oxted	15.45	2.10	0.50	3.43	0.89	2.49	24.86
Zone 1 - Other	1.52	0.20	0.00	0.00	0.00	0.09	1.80
Zone 2 - Caterham	0.00	17.97	0.00	0.06	0.00	2.00	20.03
Zone 2 - Warlingham	0.68	11.02	0.00	0.11	0.00	0.62	12.43
Zone 2 - Whyteleafe	0.00	3.34	0.00	0.06	0.00	0.18	3.58
Zone 2 - Other	0.06	1.31	0.00	0.00	0.00	0.07	1.45
Zone 3 - Lingfield	1.61	0.46	5.52	1.68	0.00	1.03	10.30
Zone 3 - Other	0.00	0.00	1.86	0.26	0.00	0.11	2.23
Zone 4 - SW Tandridge	0.71	4.20	0.96	9.16	0.00	0.79	15.82
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	2.39	0.13	2.51
Tandridge District Total	**20.03**	**40.59**	**8.83**	**14.76**	**3.28**	**7.51**	**95.00**
Central London	1.61	6.62	0.92	1.57	0.30	n/a	11.02
Croydon	0.12	7.15	0.00	0.00	0.00	n/a	7.27
Crawley	0.31	0.13	1.73	0.66	0.00	n/a	2.83
East Grinstead	0.12	0.00	2.61	1.14	0.00	n/a	3.88
Reigate and Banstead	0.12	4.52	0.00	6.71	1.49	n/a	12.85
Sevenoaks	1.67	0.13	0.00	0.00	0.00	n/a	1.80
Westerham	2.45	0.13	0.11	0.11	0.00	n/a	2.80
Other	4.52	6.29	3.82	3.60	0.89	n/a	19.13
Other Sub-Total	**10.93**	**24.98**	**9.19**	**13.79**	**2.68**	**n/a**	**61.58**
TOTAL	**30.96**	**65.57**	**18.03**	**28.55**	**5.96**	**n/a**	**156.58**

Source: Table 3A and 6

Table 9B: Food & Beverage Expenditure 2033 (£m) - Medium Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**30.96**	**65.57**	**18.03**	**28.55**	**12.88**		**155.99**
Zone 1 - Oxted	15.45	2.10	0.50	3.43	1.93	2.60	26.01
Zone 1 - Other	1.52	0.20	0.00	0.00	0.00	0.09	1.80
Zone 2 - Caterham	0.00	17.97	0.00	0.06	0.00	2.00	20.03
Zone 2 - Warlingham	0.68	11.02	0.00	0.11	0.00	0.62	12.43
Zone 2 - Whyteleafe	0.00	3.34	0.00	0.06	0.00	0.18	3.58
Zone 2 - Other	0.06	1.31	0.00	0.00	0.00	0.07	1.45
Zone 3 - Lingfield	1.61	0.46	5.52	1.68	0.00	1.03	10.30
Zone 3 - Other	0.00	0.00	1.86	0.26	0.00	0.11	2.23
Zone 4 - SW Tandridge	0.71	4.20	0.96	9.16	0.00	0.79	15.82
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	5.15	0.27	5.42
Tandridge District Total	**20.03**	**40.59**	**8.83**	**14.76**	**7.09**	**7.77**	**99.07**
Central London	1.61	6.62	0.92	1.57	0.64	n/a	11.37
Croydon	0.12	7.15	0.00	0.00	0.00	n/a	7.27
Crawley	0.31	0.13	1.73	0.66	0.00	n/a	2.83
East Grinstead	0.12	0.00	2.61	1.14	0.00	n/a	3.88
Reigate and Banstead	0.12	4.52	0.00	6.71	3.22	n/a	14.58
Sevenoaks	1.67	0.13	0.00	0.00	0.00	n/a	1.80
Westerham	2.45	0.13	0.11	0.11	0.00	n/a	2.80
Other	4.52	6.29	3.82	3.60	1.93	n/a	20.17
Other Sub-Total	**10.93**	**24.98**	**9.19**	**13.79**	**5.80**	**n/a**	**64.69**
TOTAL	**30.96**	**65.57**	**18.03**	**28.55**	**12.88**	**n/a**	**163.76**

Source: Table 3B and 6

Table 9C: Food & Beverage Expenditure 2033 (£m) - High Growth

Centre/Facility	Zone 1 Oxted	Zone 2 Caterham	Zone 3 Lingfield	Zone 4 SW Tandridge	Zone 4 Garden Village	Inflow	Total
Expenditure 2033	**30.96**	**65.57**	**18.03**	**28.55**	**19.99**		**163.11**
Zone 1 - Oxted	15.45	2.10	0.50	3.43	3.00	2.72	27.20
Zone 1 - Other	1.52	0.20	0.00	0.00	0.00	0.09	1.80
Zone 2 - Caterham	0.00	17.97	0.00	0.06	0.00	2.00	20.03
Zone 2 - Warlingham	0.68	11.02	0.00	0.11	0.00	0.62	12.43
Zone 2 - Whyteleafe	0.00	3.34	0.00	0.06	0.00	0.18	3.58
Zone 2 - Other	0.06	1.31	0.00	0.00	0.00	0.07	1.45
Zone 3 - Lingfield	1.61	0.46	5.52	1.68	0.00	1.03	10.30
Zone 3 - Other	0.00	0.00	1.86	0.26	0.00	0.11	2.23
Zone 4 - SW Tandridge	0.71	4.20	0.96	9.16	0.00	0.79	15.82
Zone 4 - Garden Village	0.00	0.00	0.00	0.00	8.00	0.42	8.42
Tandridge District Total	**20.03**	**40.59**	**8.83**	**14.76**	**11.00**	**8.04**	**103.25**
Central London	1.61	6.62	0.92	1.57	1.00	n/a	11.72
Croydon	0.12	7.15	0.00	0.00	0.00	n/a	7.27
Crawley	0.31	0.13	1.73	0.66	0.00	n/a	2.83
East Grinstead	0.12	0.00	2.61	1.14	0.00	n/a	3.88
Reigate and Banstead	0.12	4.52	0.00	6.71	5.00	n/a	16.36
Sevenoaks	1.67	0.13	0.00	0.00	0.00	n/a	1.80
Westerham	2.45	0.13	0.11	0.11	0.00	n/a	2.80
Other	4.52	6.29	3.82	3.60	3.00	n/a	21.23
Other Sub-Total	**10.93**	**24.98**	**9.19**	**13.79**	**9.00**	**n/a**	**67.89**
TOTAL	**30.96**	**65.57**	**18.03**	**28.55**	**19.99**	**n/a**	**171.14**

Source: Table 3C and 6

Table 10A: Summary of Food and Beverage Expenditure 2018 to 2033 - Baseline Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	20.81	22.50	24.49	26.66
Zone 2 - Caterham	30.07	32.72	35.22	37.48
Zone 3 - Lingfield	10.20	10.99	11.78	12.53
Zone 4 - SW Tandridge	12.78	13.85	14.88	15.82
Zone 4 - Garden Village	0.00	0.00	0.89	2.51
Total	**73.85**	**80.06**	**87.26**	**95.00**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	20.81	21.87	22.98	24.16
Zone 2 - Caterham	30.07	31.60	33.21	34.91
Zone 3 - Lingfield	10.20	10.72	11.26	11.84
Zone 4 - SW Tandridge District	12.78	13.43	14.11	14.83
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**73.85**	**77.61**	**81.57**	**85.73**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.63	1.51	2.51
Zone 2 - Caterham	0.00	1.12	2.01	2.57
Zone 3 - Lingfield	0.00	0.28	0.52	0.69
Zone 4 - SW Tandridge District	0.00	0.42	0.76	0.99
Zone 4 - Garden Village	0.00	0.00	0.89	2.51
Total	**0.00**	**2.44**	**5.68**	**9.27**

Source: Tables 5, 7, 8A to 9A

Table 10B: Summary of Food and Beverage Expenditure 2018 to 2033 - Medium Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	20.81	22.50	24.74	27.82
Zone 2 - Caterham	30.07	32.72	35.22	37.48
Zone 3 - Lingfield	10.20	10.99	11.78	12.53
Zone 4 - SW Tandridge	12.78	13.85	14.88	15.82
Zone 4 - Garden Village	0.00	0.00	1.52	5.42
Total	**73.85**	**80.06**	**88.13**	**99.07**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	20.81	21.87	22.98	24.16
Zone 2 - Caterham	30.07	31.60	33.21	34.91
Zone 3 - Lingfield	10.20	10.72	11.26	11.84
Zone 4 - SW Tandridge District	12.78	13.43	14.11	14.83
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**73.85**	**77.61**	**81.57**	**85.73**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.63	1.76	3.66
Zone 2 - Caterham	0.00	1.12	2.01	2.57
Zone 3 - Lingfield	0.00	0.28	0.52	0.69
Zone 4 - SW Tandridge District	0.00	0.42	0.76	0.99
Zone 4 - Garden Village	0.00	0.00	1.52	5.42
Total	**0.00**	**2.44**	**6.56**	**13.34**

Source: Tables 5, 7, 8B to 9B

Table 10C: Summary of Food and Beverage Expenditure 2018 to 2033 - High Growth

Centre	2018	2023	2028	2033
Available Expenditure in Tandridge District (£m)				
Zone 1 - Oxted	20.81	22.50	25.06	29.00
Zone 2 - Caterham	30.07	32.72	35.22	37.48
Zone 3 - Lingfield	10.20	10.99	11.78	12.53
Zone 4 - SW Tandridge	12.78	13.85	14.88	15.82
Zone 4 - Garden Village	0.00	0.00	2.33	8.42
Total	**73.85**	**80.06**	**89.27**	**103.25**
Turnover of Existing Facilities (£m)				
Zone 1 - Oxted	20.81	21.87	22.98	24.16
Zone 2 - Caterham	30.07	31.60	33.21	34.91
Zone 3 - Lingfield	10.20	10.72	11.26	11.84
Zone 4 - SW Tandridge District	12.78	13.43	14.11	14.83
Zone 4 - Garden Village	0.00	0.00	0.00	0.00
Total	**73.85**	**77.61**	**81.57**	**85.73**
Surplus/Defecit Expenditure (£m)				
Zone 1 - Oxted	0.00	0.63	2.08	4.85
Zone 2 - Caterham	0.00	1.12	2.01	2.57
Zone 3 - Lingfield	0.00	0.28	0.52	0.69
Zone 4 - SW Tandridge District	0.00	0.42	0.76	0.99
Zone 4 - Garden Village	0.00	0.00	2.33	8.42
Total	**0.00**	**2.44**	**7.70**	**17.52**

Source: Tables 5, 7, 8C to 9C

Table 11A: Food and Beverage Floorspace Capacity - Baseline Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	5,000	5,255	5,523	5,805
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	n/a	120	273	432
Zone 2 - Caterham	n/a	213	363	444
Zone 3 - Lingfield	n/a	52	94	119
Zone 4 - SW Tandridge District	n/a	80	138	170
Zone 4 - Garden Village	n/a	0	161	433
Total	**n/a**	**465**	**1,029**	**1,597**

Table 11B: Food and Beverage Floorspace Capacity - Medium Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	5,000	5,255	5,523	5,805
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	n/a	120	318	631
Zone 2 - Caterham	n/a	213	363	444
Zone 3 - Lingfield	n/a	52	94	119
Zone 4 - SW Tandridge District	n/a	80	138	170
Zone 4 - Garden Village	n/a	0	275	934
Total	**n/a**	**465**	**1,188**	**2,297**

Table 11C: Food and Beverage Floorspace Capacity - High Growth

	2018	2023	2028	2033
Turnover Density New Floorspace (£ per sq.m)	5,000	5,255	5,523	5,805
Floorspace Requirement (sq.m gross)				
Zone 1 - Oxted	n/a	120	377	835
Zone 2 - Caterham	n/a	213	363	444
Zone 3 - Lingfield	n/a	52	94	119
Zone 4 - SW Tandridge District	n/a	80	138	170
Zone 4 - Garden Village	n/a	0	422	1,450
Total	**n/a**	**465**	**1,393**	**3,018**

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