

LOCAL PLAN EVIDENCE BASE: RETAIL NEEDS ASSESSMENT AND TOWN CENTRES HEALTH CHECKS

Head of Service/Contact: Ruth Ormella, Head of Planning

Urgent Decision?(yes/no) No

**If yes, reason urgent decision
required:**

Annexes/Appendices (attached): Annexe 1: Draft Borough-wide Retail Needs
Assessment and Town Centres' Health
Checks (January 2020)

**Other available papers (not
attached):**

Report summary

The Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks is a technical study commissioned by the Council to inform the emerging new Local Plan. This study relates to the provision of further retail floorspace provision and to provide an assessment of the health of our retail centres. The key findings are presented in this report in summary form.

The Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks is a technical assessment and forms part of the Council's evidence base for its emerging Local Plan policies.

Recommendation (s)

The Committee notes the contents of the Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks as a technical study that will form part of the evidence base for the emerging new Local Plan.

1 Implications for the Council's Key Priorities, Service Plans and Sustainable Community Strategy

- 1.1 The Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks will form part of the evidence base for the emerging Local Plan policies. The delivery and implementation of the Epsom & Ewell Borough Local Plan will ensure sustainable growth is planned in the Borough to meet the Corporate Vision priorities and values

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2 Background

- 2.1 The Council commissioned Urban Shape to undertake a borough-wide Retail and Commercial Leisure Needs Assessment. The purpose of the Assessment is to provide the Council with an up to date and comprehensive understanding of the current health and performance of the Borough's retail and leisure offer within the existing network of town centres, to set out current and future needs for additional floorspace and to inform a robust retail and town centre strategy.
- 2.2 The Assessment and Town Centre Health Checks will be used to inform the new Local Plan. They will also provide useful technical evidence that can be used to assist in the determination of planning applications for new development in the Borough. A copy of the Needs Assessment and Town Centre Health Checks is included under Annexe 1.

3 Proposals

- 3.1 The Assessment provides a thorough review of the national, sub-regional and local retail market. It includes both a qualitative and quantitative assessment of all of the retail centres which includes a household telephone survey, site surveys and analysis of external published data. The findings are detailed and comprehensive but have been briefly summarised by the bullet points below. These conclusions and recommendations will inform the retail policies in the draft Local Plan.
- 3.2 Conclusions
 - The Town Centre has received substantial investment since Plan E
 - The Epsom BID has been created resulting in more funding and investment
 - The role of Epsom Town Centre within the network of larger sub-regional centres has improved and strengthened over the last ten years – clawing trade back from Kingston and Sutton and consolidating market share – a strong indicator of vitality and viability.
 - The market share of all other centres in the borough has fallen– only Epsom has an enhanced market share, consolidating its position within its own catchment area.
 - Major redevelopment schemes in Croydon and Guildford have stalled (due to the national economy and changing town centre requirements), whilst a scheme in Sutton is complete and has had little or no impact on Epsom Town Centre. Kingston is bringing forward the Eden Walk redevelopment and should be monitored, but the John Lewis click and collect at Waitrose Epsom has helped the Town Centre's trade retention and reduced the need to travel to Kingston so frequently.

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- Stoneleigh Broadway is a strong performing town centre, and the use class mix in % terms remains healthy. There is strong customer loyalty. Main concern is the growth of non-use class A on the high street, now totalling 17 (Use Class B1 businesses) compared to just 5 in 2011.
- Ewell Village has a good mix of operators and a selection of specialist key attractors, however there has been a significant decline in retail businesses from 70 to 57 since 2011 with decline of A1 being most significant. A2 and A3 has grown, but vacancy remains low. Loss of retail activity around Cheam Road/High Street junction – separating the town centre in two. Location of Post Office and pharmacy in north of centre is key if this part of the town centre is to remain in active use.
- Waitrose / M&S town centre foodstores figures suggest they are under-performing but not significantly and this is likely to be topped up considerably by passing trade, employees in Epsom Town Centre and students etc. Small Tesco's and Co-Op's are substantially over-trading.
- Co-Op and Sainsbury's in Stoneleigh significantly over-trading; Co-op and Sainsbury's in Ewell over-trading, but more in line with expected company average sales densities. The assessment highlights the importance of the two convenience foodstores in both Ewell Village and Stoneleigh Broadway as being key anchors and identified footfall drivers that help maintain the vitality and viability of these centres.

3.3 Suggested Actions

- Retention of Primary and Secondary frontages – as suggested in Planning Guidance;
- Monitor consultation and government recommendations in respect of planning reform/permitted development. It is uncertain what a more relaxed Class A1 mean in reality. Policy can't respond without further detail at present, but the study will recommend an appropriate town centre mix across character areas;
- Lower the retail impact assessment threshold to a locally identified figure;
- Epsom Town Centre retail offer focused more on multi-dimensional retail, leisure, cultural and visitor offer – not under-playing the important role of A1 – key to competition with the internet;
- Retention of Use Class A category on Stoneleigh Broadway, and policy restriction on dead frontages and B1 offices;
- Retention of one consolidated shopping centre in Ewell and avoid further change of use away from retail and non-active frontages;

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- Recommendations in respect of frontages and boundaries and need/development sites.

4 Financial and Manpower Implications

- 4.1 The Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks has been prepared within agreed budgets by external consultants Urban Shape.
- 4.2 In terms of internal resource implication, this has been in the project tendering and contracting of the service; followed by project management after the consultants had been appointed.

5 Legal Implications (including implications for matters relating to equality)

- 5.1 The Local Plan will be examined to assess that it has followed legal and procedural requirements and that it is 'Sound'. For the Plan to be considered Sound, it needs to meet the following tests:
 - Positively prepared
 - Justified
 - Effective
 - Consistent with national policy
- 5.2 The Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks will inform the strategies and policies contained within the emerging new Local Plan in order to ensure that they meet the tests of soundness.
- 5.3 ***Monitoring Officer's comments: none arising from the contents of this report.***

6 Sustainability Policy and Community Safety Implications

- 6.1 The new Local Plan will contribute towards delivering the Council's objectives and priorities.
- 6.2 Proposed policies are subject to a Sustainability Appraisal which is an integral part of the plan making process.

7 Partnerships

- 7.1 Local Planning Authorities have a duty to cooperate with public bodies on strategic planning issues that cross administrative boundaries.
- 7.2 Urban Shape have engaged with a wide range of partners and commercial interests in preparing the assessment report.

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8 Risk Assessment

- 8.1 Insufficient evidence to support the new Local Plan policies may result in the Local Plan not meeting the test of Soundness of being positively prepared, justified, effective and consistent with national policy.

9 Conclusion and Recommendations

- 9.1 The Committee notes the contents of the Draft Borough-wide Retail Needs Assessment and Town Centres' Health Checks as a technical study that will form part of the evidence base for the emerging retail policies in the new Local Plan and be published on the Council's website.

Ward(s) affected: (All Wards);