



Nathaniel Lichfield  
& Partners

Planning. Design. Economics.

**Retail and Town Centres Study**

**2017 Update**

Vale of White Horse District Council

February 2017

13214/02/PW/PW

Nathaniel Lichfield & Partners  
14 Regent's Wharf  
All Saints Street  
London N1 9RL

[nlpplanning.com](http://nlpplanning.com)

This document is formatted for double sided printing.

© Nathaniel Lichfield & Partners Ltd 2017. Trading as Nathaniel Lichfield & Partners.

All Rights Reserved.

Registered Office:

14 Regent's Wharf

All Saints Street

London N1 9RL

All plans within this document produced by NLP are based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. © Crown Copyright reserved. Licence number AL50684A

# Contents

---

1.0	<b>Introduction</b>	<b>5</b>
	Overview .....	5
2.0	<b>Audit of the Main Centres</b>	<b>7</b>
	Introduction .....	7
	Abingdon Town Centre .....	7
	Wantage Town Centre .....	10
	Faringdon Town Centre .....	12
	Botley Local Service Centre .....	13
	Grove .....	14
3.0	<b>Policy Review</b>	<b>16</b>
	Introduction .....	16
	Town Centre Boundaries and Shopping Frontages .....	16
4.0	<b>Update Retail and Leisure Capacity</b>	<b>25</b>
	Introduction .....	25
	Population and Expenditure .....	25
	Base Year Spending Patterns 2014 .....	26
	Commitments and Proposals .....	27
	Capacity for Convenience Goods Floorspace .....	28
	Capacity for Comparison Goods Floorspace .....	29
	Sensitivity Analysis .....	30
	Commercial Leisure .....	30
5.0	<b>Conclusions and Recommendations</b>	<b>32</b>
	Policy Review .....	32
	Updated Retail Floorspace Capacity .....	34



1.0

# Introduction

## Overview

1.1

The Vale of White Horse District Council Local Plan 2031: Part 1 (LPP1) was adopted in December 2016. The LPP1 sets the strategic policies and identifies strategic sites for housing, employment and supporting infrastructure required in the district up to 2031.

1.2

The Council is progressing the Local Plan 2031: Part 2: Detailed Policies and Additional Sites (LPP2). This will set out policies and locations for housing for the Vale's proportion of Oxford's housing need up to 2031, which cannot be met within the City boundaries. This document will also contain policies for the part of Didcot Garden Town that lies within the Vale of White Horse District and detailed development management policies to complement Local Plan 2031 Part 1. It will replace the saved policies of the Local Plan 2011, and allocate additional development sites for housing.

1.3

Nathaniel Lichfield & Partners (NLP) has been commissioned by the Vale of White Horse (VOWH) District Council to provide an update of the Retail and Town Centre Study produced by NLP in March 2013 (RTCS 2013). An Addendum to this study was prepared in October 2014 (Addendum 2014). The update set out in this report assesses the implications of the additional strategic housing options, and the likely associated changes in the retail floorspace needs arising from the revised population figures. This Report should be read alongside the RTCS 2013 and the Addendum 2014.

1.4

The main elements updated are as follows:

- 1 a review of town centre boundaries and primary and secondary shopping frontages in Abingdon on Thames, Wantage and Faringdon, as currently defined by policies in the adopted Local Plan 2011, with recommended changes to these designations as required;
- 2 an assessment of the need for town centre boundaries and primary and secondary shopping frontages in the local service centres of Botley and Grove, taking into account proposed growth in these settlements;
- 3 identification of significant changes in retail and commercial leisure facilities both within and outside the District (e.g. Swindon, Oxford, Newbury, Didcot) that have occurred since the previous report;
- 4 a review of other saved policies for the Local Plan 2011 relating to retail and commercial leisure provision in the District;
- 5 an update of retail and commercial leisure needs in the district;
- 6 an assessment of the implications for retail and commercial leisure needs in the district of potential site allocations for additional housing to address the unmet need for Oxford and the development of Didcot Garden Town; and

- 7 an assessment of the implications of the removal of sites at Harwell and East Hanney from the LPP1, in accordance with the recommendations of the Planning Inspector.

2.0

## Audit of the Main Centres

### Introduction

2.1

The RTCS 2013 included an audit of the main centres within the District. This section updates the land use information collated in the 2013 centre audits, and summarises the implications of the key changes for emerging Local Plan policies.

### Abingdon Town Centre

2.2

The mix of uses within the Abingdon town centre boundary is shown in Table 2.1. The mix of uses within the primary and secondary frontages is shown in Table 2.2 and Table 2.3. The overall shop vacancy rate (6.5%) is significantly lower than the national average (11.8%), and has improved from 10.2% in 2012. The reduction in vacant units suggests the centre has recovered well following the recession.

2.3

The land use survey suggests the number of Class A1 retail units within the town centre is unchanged since 2012 (100 units). The number of Class A3/A5 food and beverage uses has increased marginally by 4 units. The proportion of Class A1 retail uses (53.8%) is only marginally below the Goad national average (56.5%).

Table 2.1: Abingdon Town Centre Use Class Mix by Unit

Type of Unit	Units 2012	Units 2016	% of Total Number of Units	
			Abingdon %	UK Average <sup>(1)</sup>
Comparison Retail	65	63	33.9	35.8
Convenience Retail	15	12	6.5	8.4
A1 Services <sup>(2)</sup>	20	25	13.4	12.3
A2 Services <sup>(3)</sup>	30	33	17.7	12.3
A3/A5	28	32	17.2	14.9
A4 Pubs/bar	9	9	4.8	4.5
Vacant	19	12	6.5	11.8
<b>Total</b>	<b>186</b>	<b>186</b>	<b>100.0</b>	<b>100.0</b>
B1	28	27	N/A	N/A
C3	1	1	N/A	N/A
D1	13	14	N/A	N/A
<b>Overall Total</b>	<b>8</b>	<b>8</b>	<b>N/A</b>	<b>N/A</b>

Source: Vale of White Horse District Council Land Use Survey April 2012 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

2.4

Within the primary frontages the number of Class A1 units has reduced by only one unit between 2012 and 2016 (66 to 65 units). The proportion of Class A1 retail uses within the primary frontages (62.6%) is above the Goad national average (56.5%).

Table 2.2: Abingdon Primary Frontage Use Class Mix by Unit

Type of Unit	Units 2012	Units 2016	% of Total Number of Units	
			Abingdon %	UK Average <sup>(1)</sup>
Comparison Retail	42	40	38.5	35.8
Convenience Retail	12	9	8.7	8.4
A1 Services <sup>(2)</sup>	12	16	15.4	12.3
A2 Services <sup>(3)</sup>	16	19	18.3	12.3
A3/A5	8	11	10.6	14.9
A4 Pubs/bar	2	3	2.9	4.5
Vacant	13	6	5.8	11.8
<b>Total</b>	<b>105</b>	<b>104</b>	<b>100.0</b>	<b>100.0</b>
B1	1	1	N/A	N/A
C3	1	2	N/A	N/A
D1	1	1	N/A	N/A
<b>Overall Total</b>	<b>108</b>	<b>108</b>	<b>N/A</b>	<b>N/A</b>

Source: Vale of White Horse District Council Land Use Survey April 2012 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

Table 2.3: Abingdon Secondary Frontage Use Class Mix by Unit

Type of Unit	Units 2012	Units 2016	% of Total Number of Units	
			Abingdon %	UK Average <sup>(1)</sup>
Comparison Retail	17	16	37.2	35.8
Convenience Retail	1	1	2.3	8.4
A1 Services <sup>(2)</sup>	3	3	7.0	12.3
A2 Services <sup>(3)</sup>	6	6	14.0	12.3
A3/A5	10	11	25.6	14.9
A4 Pubs/bar	4	3	7.0	4.5
Vacant	2	3	7.0	11.8
<b>Total</b>	<b>43</b>	<b>43</b>	<b>100.0</b>	<b>100.0</b>
B1	1	1	N/A	N/A
D1	1	1	N/A	N/A
<b>Overall Total</b>	<b>45</b>	<b>45</b>	<b>N/A</b>	<b>N/A</b>

Source: Vale of White Horse District Council Land Use Survey April 2012 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)



2.5 Within the secondary frontages the number of Class A1 units has also reduced by only one unit between 2012 and 2016. The proportion of Class A1 retail uses within the secondary frontages (46.5%) is notably lower than the primary frontages (62.6%), which endorses the need for a different policy approach with primary and secondary frontages in Abingdon.

2.6 A breakdown of Class A1 and non-A1 uses within each area is shown in Table 2.4. The High Street and Market Place have a relatively high proportion of non-A1 uses, which suggests future erosion of Class A1 uses could adversely affect the vitality and viability of these areas as core shopping streets.

Table 2.4: Abingdon Use Class Mix by Frontage

Frontage	A1 Units	Non-A1 Units	Total Units
<b>Primary Frontage</b>			
Bury Street Shopping Centre	28	5	33
High Street	10	19	29
Market Place	5	7	12
Stert Street	18	11	29
West St Helen Street	4	1	5
<b>Secondary Frontage</b>			
Bath Street	7	15	22
Bridge Street	3	3	6
Bury Street Shopping Centre	2	1	3
Coexter Yard	1	0	1
East St Helens Street	1	0	1
Market Place	2	2	4
Ock Street	2	0	2
The Square	2	3	5
West St Helen Street	0	1	1

Source: Vale of White Horse District Council Land Use Survey April 2012 and NLP Survey October 2016

2.7 The analysis of land uses in Abingdon suggests that Saved Local Plan policies (S2, S3 and S4) have been successful in protecting against the loss of Class A1 and generally the loss of Class A uses, since 2012. The number of Class A1 and A uses has not reduced significantly and the number of vacant units has reduced.

2.8 Overly restrictive frontage policies can lead to an increase in vacant units, whilst ineffective or too flexible policies can result in an increase in non-A1 uses. Neither of these circumstances is evident in Abingdon, which suggests the saved frontage policies have been fit for purpose.

## Wantage Town Centre

- 2.9 The mix of uses within the Wantage town centre boundary is shown in Table 2.5. The mix of uses within the primary and secondary frontages is shown in Table 2.6 and Table 2.7. The overall shop vacancy rate (9.2%) is lower than the national average (11.8%), and has improved from 15.9% in 2012, which suggests the centre has also recovered well following the recession.
- 2.10 The land use survey suggests the number of Class A1 retail units within the town centre has increased by 7 between 2012 and 2016 (86 to 93 units), due to the overall reduction in vacant units (24 to 14 vacant units). The number of Class A3/A5 food and beverage uses has increased by 5 units. The proportion of Class A1 retail uses (61.2%) remains above the Goad national average (56.5%).

Table 2.5: Wantage Town Centre Use Class Mix by Unit

Type of Unit	Units 2011	Units 2016	% of Total Number of Units	
			Wantage %	UK Average <sup>(1)</sup>
Comparison Retail	55	52	34.2	35.8
Convenience Retail	13	13	8.6	8.4
A1 Services <sup>(2)</sup>	18	28	18.4	12.3
A2 Services <sup>(3)</sup>	18	17	11.2	12.3
A3/A5	15	20	13.2	14.9
A4 Pubs/bar	8	8	5.3	4.5
Vacant	24	14	9.2	11.8
<b>Total</b>	<b>151</b>	<b>152</b>	<b>100.0</b>	<b>100.0</b>
B1	14	12	N/A	N/A
C3	1	1	N/A	N/A
D1	23	22	N/A	N/A
D2	9	11	N/A	N/A
<b>Overall Total</b>	<b>3</b>	<b>3</b>	<b>N/A</b>	<b>N/A</b>

Source: Vale of White Horse District Council Land Use Survey March 2011 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

- 2.11 Within the primary frontages the number of Class A1 units has increased by 3 units between 2012 and 2016 (58 to 61 units). The proportion of Class A1 retail uses within the primary frontages (59.2%) is above the Goad national average (56.5%).
- 2.12 Within the secondary frontages the number of Class A1 units has increased by 2 units between 2012 and 2016. The proportion of Class A1 retail uses within the secondary frontages (54.2%) is marginally lower than the primary frontages (59.2%).

Table 2.6: Wantage Primary Frontage Use Class Mix by Unit

Type of Unit	Units 2011	Units 2016	% of Total Number of Units	
			Wantage %	UK Average <sup>(1)</sup>
Comparison Retail	37	33	32.0	35.8
Convenience Retail	8	8	7.8	8.4
A1 Services <sup>(2)</sup>	13	20	19.4	12.3
A2 Services <sup>(3)</sup>	16	14	13.6	12.3
A3/A5	9	13	12.6	14.9
A4 Pubs/bar	4	4	3.9	4.5
Vacant	15	11	10.7	11.8
<b>Total</b>	<b>102</b>	<b>103</b>	<b>100.0</b>	<b>100.0</b>
B1	4	2	N/A	N/A
C3	3	2	N/A	N/A
D1	0	2	N/A	N/A
<b>Overall Total</b>	<b>109</b>	<b>109</b>	N/A	N/A

Source: Vale of White Horse District Council Land Use Survey March 2011 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

Table 2.7: Wantage Secondary Frontage Use Class Mix by Unit

Type of Unit	Units 2011	Units 2016	% of Total Number of Units	
			Wantage %	UK Average <sup>(1)</sup>
Comparison Retail	4	5	20.8	35.8
Convenience Retail	2	1	4.2	8.4
A1 Services <sup>(2)</sup>	5	7	29.2	12.3
A2 Services <sup>(3)</sup>	1	2	8.3	12.3
A3/A5	6	7	29.2	14.9
A4 Pubs/bar	2	2	8.3	4.5
Vacant	1	0	0.0	11.8
<b>Total</b>	<b>21</b>	<b>24</b>	<b>100.0</b>	<b>100.0</b>
B1	3	1	N/A	N/A
C3	6	5	N/A	N/A
D1	3	3	N/A	N/A
D2	1	1	N/A	N/A
<b>Overall Total</b>	<b>109</b>	<b>109</b>	N/A	N/A

Source: Vale of White Horse District Council Land Use Survey March 2011 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

- 2.13 A breakdown of Class A1 and Non-A1 uses within each area is shown in Table 2.8. Non-A1 uses are relatively evenly spread throughout the primary frontages, with slightly higher proportions in Mill Street and the Market Place.

Table 2.8: Wantage Use Class Mix by Road

Frontage	A1 Units	Non-A1 Units	Total Units
<b>Primary Frontage</b>			
Grove Street	7	1	8
Market Place	24	23	47
Mill Street	11	12	23
Newbury Street	6	5	11
Victoria Cross Gallery	3	1	4
Wallingford Street	10	6	16
<b>Secondary Frontage</b>			
Church Street	2	3	5
Grove Street	4	4	8
Mill Street	1	1	2
Newbury Street	4	6	10
Wallingford Street	2	7	9

Source: Vale of White Horse District Council Land Use Survey March 2011 and NLP Survey October 2016

- 2.14 The analysis of land uses in Wantage also suggests that Saved Local Plan policies (S2, S3 and S4) have been successful in protecting against the loss of Class A1 and other Class A uses since 2012, which suggests the saved frontage policies have been fit for purpose.

## Faringdon Town Centre

- 2.15 The mix of uses within the Faringdon town centre is shown in Table 2.9. The overall shop vacancy rate (7.8%) is lower than the national average (11.8%).
- 2.16 The land use survey suggests the number of Class A1 retail units within the town centre has reduced by 3 between 2012 and 2016 (32 to 29 units), due to changes of use to Class A3/A5, B1 and C3 residential. The proportion of Class A1 retail uses (56.8%) is comparable with the Goad national average (56.5%). The reduction in Class A1 uses since 2012 has not significantly affected the balance of Class A1 and non-A1 uses within Faringdon, however this trend should be monitored and checked if required.
- 2.17 The number of Class A2 and B1 offices has reduced by one since 2012, but the number Class A3/A5 food and beverage outlets has increased by 4. Saved Local Plan Policy S5 has been less successful in protecting against the loss of Class A1 and Class A uses generally, than frontage policies in Abingdon and Wantage. This may be due to stronger retail occupier demand for spaces within the two largest town centres, and therefore less pressure for alternative non-A1 uses.

Table 2.9: Faringdon Centre Use Class Mix by Unit

Type of Unit	Units 2011	Units 2016	% of Total Number of Units	
			Faringdon %	UK Average <sup>(1)</sup>
Comparison Retail	19	17	33.3	35.8
Convenience Retail	6	5	9.8	8.4
A1 Services <sup>(2)</sup>	7	7	13.7	12.3
A2 Services <sup>(3)</sup>	7	4	7.8	12.3
A3/A5	6	10	19.6	14.9
A4 Pubs/bar	5	4	7.8	4.5
Vacant	4	4	7.8	11.8
<b>Total</b>	<b>54</b>	<b>51</b>	<b>100.0</b>	<b>100.0</b>
B1	3	5	N/A	N/A
C1	2	2	N/A	N/A
C3	1	3	N/A	N/A
D1	0	1	N/A	N/A
D2	2	2	N/A	N/A
<b>Overall Total</b>	<b>62</b>	<b>64</b>	<b>N/A</b>	<b>N/A</b>

Source: Vale of White Horse District Council Land Use Survey October 2011 and NLP Survey October 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

- 2.18 The number of vacant units has not increased in Faringdon, which suggests Policy S5 is not overly restrictive.

## Botley Local Service Centre

- 2.19 The mix of uses within the Botley Local Service Centre is shown in Table 2.10, including 4 comparison goods retail warehouse units nearby. The vacancy rate in Botley has increased significantly since 2012, because the centre is proposed for redevelopment. Botley continues to have a high proportion of convenience shops and non-retail services, and conversely a lower proportion of comparison shops, which is consistent with its local role in the shopping hierarchy.
- 2.20 The redevelopment master plan proposes the demolition of 9 of the vacant units, 4 comparison shops, 3 convenience stores (Co-op, Iceland and Tesco Express), 2 Class A1 services and 7 non-A1 uses (including the library). Elms Parade will be retained. The demolished uses will be replaced by a food store (1,270 sq.m), 21 retail units (small to medium up to 394 sq.m) and community facilities. Overall the number of retail outlets will remain largely unchanged at Botley. The mix of Class A1 – A5 uses that will occupy the 21 new retail units is unclear at this stage and the mix of uses is not controlled via planning conditions. The applicant's retail impact assessment suggests that up to 75%

of the proposed floorspace will be occupied by Class A1 uses, and the remainder will accommodate other A2 to A5 uses in order to create a Local Service Centre.

Table 2.10: Botley Centre Use Class Mix by Unit

Type of Unit	Units 2012	Units 2016	% of Total Number of Units	
			Botley %	UK Average <sup>(1)</sup>
Comparison Retail	10	11	26.2	35.8
Convenience Retail	7	6	14.3	8.4
A1 Services <sup>(2)</sup>	8	6	14.3	12.3
A2 Services <sup>(3)</sup>	7	4	9.5	12.3
A3/A5	5	3	7.1	14.9
A4 Pubs/bar	1	1	2.4	4.5
Vacant	3	11	26.2	11.8
<b>Total</b>	<b>41</b>	<b>42</b>	<b>100.0</b>	<b>100.0</b>
D1	N/A	3	N/A	N/A
<b>Overall Total</b>	N/A	<b>45</b>	N/A	N/A

Source: NLP Survey October 2016

Note: Includes data from West Way Shopping Centre and other facilities nearby

(1) UK average for all town centres surveyed by Goad Plans (June 2015)

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops (sui generis)

## Grove

2.21

Grove is served by two main shopping destinations at Millbrook Square and Grovelands (Blenheim Gardens). The mix of uses within both centres combined is shown in Table 2.11.

Table 2.11: Grove Centre Use Class Mix by Unit

Type of Unit	Units 2016	% of Total Number of Units	
		Grove %	UK Average <sup>(1)</sup>
Comparison Retail	6	21.4	35.8
Convenience Retail	7	25.0	8.4
A1 Services <sup>(2)</sup>	4	14.3	12.3
A2 Services <sup>(3)</sup>	4	14.3	12.3
A3/A5	6	21.4	14.9
A4 Pubs/bar	0	0.0	4.5
Vacant	1	3.6	11.8
<b>Total</b>	<b>28</b>	<b>100.0</b>	<b>100.0</b>
D1	1	N/A	N/A
<b>Overall Total</b>	<b>29</b>	N/A	N/A

Source: NLP Survey October 2016

Note: Includes data from Co-op anchored parade, Tesco Express anchored parade and Other Shops

(1) UK average for all town centres surveyed by Goad Plans (June 2015)

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops and tattoo shops (sui generis)

2.22

Millbrook Square is anchored by a Tesco Express convenience store.

Grovelands is anchored by a Co-op convenience store. Together these two local shopping destinations provide a reasonable mix of shops and services that serves the local community in Grove.

3.0

## Policy Review

### Introduction

3.1

The Council is reviewing saved policies that are relevant to retail and other main town centre uses (including those relating to town centre boundaries, primary and secondary frontages). As part of this process, NLP has been commissioned to review saved policies and advise on emerging policies to ensure that they are consistent with the policies contained in Local Plan 2031 Part 1 and with national policy and guidance. The saved policies are:

- S2: Primary shopping frontages for Abingdon and Wantage;
- S3: Secondary shopping frontages for Abingdon and Wantage;
- S4: Non retail uses in Abingdon and Wantage town centres;
- S5: Non retail uses in Faringdon Town Centre;
- S6: Upper floors in town centres;
- S8: The Limborough Road area, Wantage;
- S10: Ock Street, Abingdon;
- S11: Park Road, Faringdon;
- S12: Policies for local shopping centres;
- S13: Development of village shops;
- S14: Loss of village and other local shops;
- S15: Garages and garage shops and non-retail (leisure and community) uses.

### Town Centre Boundaries and Shopping Frontages

3.2

Centre boundaries and shopping frontages designations within development plans have dual functions, as follows.

- 1 They define the area where new retail and main town centres uses will be focused consistent with the sequential approach. The boundary and/or frontages can determine what is considered to be in-centre, edge of centre and out of centre when applying the sequential approach, and whether a retail impact assessment is required.
- 2 Frontage policies seek to control the mix of uses in order to provide an appropriate balance of uses to maintain the vitality and viability of the centre and to prevent amenity issues such as smells and noise.

3.3

The NPPF requires planning policies to be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. This approach includes defining the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and allocating suitable



sites for retail and other main town centre uses. The NPPF provides limited information on how these designations should be determined. Annex 2 of the NPPF provides definitions of these designations, as follows:

**“Town centre:** Area defined on the local authority’s proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

**Primary shopping area:** Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

**Primary and secondary frontages:** Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.”

- 3.4 The NPPF (paragraph 23) indicates that local authorities should:
- “define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and set out policies that make clear which uses will be permitted in such locations.”*
- 3.5 In addition to indicating what uses will be permitted in these defined areas, local planning authorities should:
- “promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites.”*
- 3.6 It is clear that a balanced mix of uses is required in town centres, notwithstanding specific local circumstances. There is a reasonable degree of flexibility for local authorities to take into account local circumstances during the plan making process, and in this respect the NPPF is not prescriptive.
- 3.7 As indicated above, the designation of primary shopping areas and/or centre boundaries is important when applying the sequential approach and directing town centre uses to appropriate locations.
- 3.8 The NPPF indicates that the first preference for retail uses should be the primary shopping area, which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the primary shopping area and other parts of the centre.

- 3.9 Core Policy 32 within the Local Plan 2031: Part One relates to the sequential approach and impact tests. Core Policy 32, clearly indicates that retail and other main town centre uses will be directed to Market Towns (Abingdon, Wantage and Faringdon) and Local Service Centres (Botley and Grove). This policy is consistent with the NPPF.
- 3.10 For Class A retail development the primary and secondary frontages in Abingdon and Wantage and development allocations in Abingdon and Botley are preferred locations. Other main town centre uses (e.g. offices and leisure) will be directed to the wider designated town centre areas.
- 3.11 Recent changes to the General Permitted Development Order (GPDO) will also have an impact on frontage policies. These measures allow for greater flexibility for changes of use from retail to non-retail uses subject to Prior Approval e.g. Class A uses to C3 residential use and Class A1 to non-A1 uses. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce where shop units are predominantly small (less than 150 sq.m gross). NLP's analysis in Section 2 suggests (to date) the impact of the GPDO changes has been insignificant i.e. there has been no significant reduction in Class A1 uses.
- 3.12 The NPPF indicates that development plans may continue to distinguish between primary and secondary frontages in town centres and consider their relative importance to the character of the centre. Primary frontages are characterised by a high proportion of retail uses, while secondary frontages are areas of mixed commercial development.
- 3.13 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres. However a *laissez faire* approach could result in the deterioration of shopping frontages and could undermine the role of the shopping centre. This approach could lead to a significant increase in the proportion of non-retail uses. The emergence of a large number of vacant premises within shopping frontages may be the only circumstances where a *laissez faire* approach would be appropriate, particularly where there are concentrations of vacant units. Less restrictive shopping frontages policies can be introduced to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas.
- 3.14 The analysis of the mix of uses within each centre set out in Section 2 and changes in the composition since 2012 does not indicate a significant erosion of Class A1 uses, a contraction of the town centre or an increase in the shop vacancy rates. There is no evidence to suggest a less restrictive approach is necessary within the VOWH, particularly in view of the future retail floorspace growth projections outlined in this report for the District.
- 3.15 Alternatively, a ban on changes of use from Class A1 or other Class A across all frontages would not promote diversity and could stifle investment, which could be potentially damaging to the vitality and viability of centres. In secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units,

because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres. Furthermore recent changes to the GPDO already provide a significant level of flexibility for smaller units.

3.16 Our analysis in Section 2 suggests there is no evidence the policy approach in the VOWH has led to a disproportionately high level of non-retail uses in any centre.

3.17 A balanced approach should continue to be applied in the VOWH. A review of saved policies relevant to the main centres is set out below.

## **Abingdon**

3.18 Abingdon has commercial areas that adjoin the main shopping frontages areas, which include other main town centre uses e.g. the health centre, civic offices and car parks. These uses should be included in the town centre boundary in emerging development policies, because the NPPF indicates main town centre uses are appropriate in areas surrounding the primary shopping area.

3.19 The town centre boundary as currently defined is relatively tightly drawn around commercial uses and the areas surrounding are predominantly residential in character or open space. There is no need to amend the Abingdon town centre boundary in the future, because there has been no expansion or contraction of town centre uses since the original boundary was designated. The number of town centre uses has remained broadly unchanged and there are no concentrations of vacant units within peripheral shop frontages within Abingdon.

3.20 Within the town centre boundary it is necessary to define separate shopping frontages or a primary shopping area, in order to differentiate between the appropriate sequential location for new retail uses and other main town centre uses, as set out in Core Policy 32.

3.21 Saved Policy S2 restricts any loss of Class A1 floorspace at ground floor level within the primary shopping frontages, whilst Policy S3 provides more flexibility for Class A2, A3 and amusement uses within the secondary frontages. Policy S4 provides even more flexibility within other parts of the town centre not designated as frontages. Policy S6 encourages diversity on upper floors by maintaining and improving means of access in all parts of the town centre.

3.22 As indicated in Section 2, the vacancy rate is relatively low across the primary and secondary frontages in Abingdon, and has reduced since the original frontages were designated. The mix of uses has remained broadly unchanged. As a result there is no need to relax the constraints in Saved Policies S2 or S3 to address high vacancy rates. Evidence suggests these policies have been successful in maintaining a balance of retail and non-retail services within the centre in recent years, without increasing vacancy rates.

3.23 The primary shopping frontages account for just under half of the ground floor commercial uses within the town centre as a whole. The proportions of non-

Class A1 use in the primary frontages are already relatively high within the High Street, Market Square and Stert Street, and it is desirable to maintain a strong Class A1 focus in this core area. Secondary frontages and other areas provide sufficient flexibility for non-Class A1 uses.

3.24 Policies S3, S4 and S6 provide a high degree of flexibility for non-A1 uses and non-Class A uses generally. The recent changes to the GPDO will provide more flexibility for smaller units throughout the centre.

3.25 There is no need to amend the approach set out in Saved Policies S2, S3 and S4 in Abingdon. However a small number of minor amendments to the frontage designations could be considered, as set out below.

3.26 There are gaps in the secondary frontages on the north and south side of the Square and Ock Street. This area is within the heart of the town centre and has a number of relatively large shop premises occupied by Class A uses. Bearing in mind the future retail floorspace projections for Abingdon and the low shop vacancy rate these uses could be protected in order to maintain the vitality and viability of the town centre and to ensure the future needs of customers are met.

3.27 The following units could be designated as secondary frontage to protect the existing Class A uses and to maintain footfall between the Coexter House and the rest of the town centre:

- Numbers 1 and 2 The Square (Barclays and Ask Restaurant);
- Numbers 2 to 8 (even) Ock Street (including Lloyds bank); and
- Numbers 5 to 15 (odd) Ock Street).

3.28 Saved Policy S10 encourages proposals that lead to environmental improvements in the Ock Street Policy Area. This area is located outside the Abingdon town centre boundary and predominantly outside conservation area designations.

3.29 Ock Street contains some important tertiary town centre uses and it remains an important gateway to the town centre both for pedestrians and other visitors. In addition to new buildings and refurbishment the policy envisages improvements to street furniture, shop frontage, landscaping and pavements.

3.30 The retail floorspace projections suggest Abingdon will need to accommodate growth over the plan period. Opportunities to accommodate growth in the town centres i.e. vacant units and development opportunities may not be sufficient to accommodate all this growth. The Ock Street area could assist in accommodating new mixed use development that can improve the environment and role of this important gateway. The objectives of Policy S10 remain valid and consistent with the NPPF. Emerging development plan allocations in this area could provide more detail on what form of development and improvements could be achieved on a site by site basis.

## Wantage

- 3.31 Wantage also has adjoining commercial areas that extend beyond the main shopping frontages that include other main town centre uses e.g. government buildings, library and car parks. These uses are currently included in the town centre boundary.
- 3.32 The town centre boundary correctly includes the Limborough Road development (Saved Policy S8) which has now become an integrated part of the shopping area. The areas surrounding the town centre boundary are predominantly residential in character or open space. As shown in Section 2, the number of town centre uses has remained broadly unchanged and there are no concentrations of vacant units within peripheral shop frontages within Wantage. There is no need to amend the Wantage town centre boundary in the future.
- 3.33 As in Abingdon, within the town centre boundary it is necessary to continue to define separate shopping frontages and a primary shopping area, in order to differentiate between the appropriate sequential location for new retail uses and other main town centre uses, as set out in Core Policy 32.
- 3.34 The shop vacancy rate in Wantage, like Abingdon, is below the national average, and has reduced significantly since the original shop frontages were designated. There is no need to relax Saved Policies S2 or S3 in order to address high vacancy rates. Evidence set out in Section 2 suggests these policies have been successful in maintaining a balance of retail and non-retail services within the centre in recent years, and the number of Class A1 uses has increased and the vacancy rate has reduced since 2012.
- 3.35 The primary shopping frontage accounts for just over half of the ground floor commercial uses within the town centre as a whole. The proportions of Non-Class A1 use in the primary frontages are already relatively high within the Market Place, Mill Street and Newbury Street.
- 3.36 It is desirable to maintain a strong Class A1 focus in Market Place and Newbury Street because they form part of the core area of the centre. Mill Street is relatively peripheral to the heart of town centre and the area is characterised by small shop units i.e. where changes to the GPDO will allow changes of use without planning permission. The quality of some premises within this area is relatively poor and the turnover of occupiers has been high. The Council should consider re-designating the primary shopping frontages on Mill Street as secondary shopping frontages to provide more flexibility and ensure vacancies do not emerge in this area.
- 3.37 Arbery Arcade has not been designated as a shopping frontage (primary or secondary). The arcade is in a central location located off Market Place (between Greggs and Costa Coffee and contains 7 small but occupied shop units i.e. Arbery Emporium Gifts, Clarks Barber Shop, Wild Wickets, Sweets and More, Play It Again Records, Toy Planet and Creative Kidz. These specialist independent traders make a positive contribution to Wantage's retail

offer. A significant part of this arcade was vacant in 2012 and at that time there was not a strong case for the units to be designated as primary frontage. Given the increase shopping role of this arcade the Council should consider designating the shop units as secondary shopping frontage in order to protect the Class A uses.

- 3.38 The Limborough Road Area (Saved Policy S8) has been successfully implemented and is now occupied. The King's Walk area opposite the Sainsbury's store also has Class A1 multiple retailers. Bearing in mind the future retail floorspace projections for Wantage and the reduced shop vacancy rate, these uses could be protected in order to maintain the vitality and viability of the town centre and to ensure the future needs of customers are met. New primary shopping frontages should be designated to protect the new Class A1 retail in these areas.

## **Faringdon**

- 3.39 Unlike Abingdon and Wantage, Faringdon does not have adjoining commercial areas that extend beyond the main shopping frontages. The area surrounding the centre boundary is predominantly residential in character. Although the Park Road area is an important tertiary area. There is no need to identify a separate town centre boundary and primary shopping area within Faringdon.
- 3.40 The centre boundary, as currently drawn, includes a small number of commercial uses at the west end of Marlborough Street, past the Police station on Pulling Close, including a MOT garage and takeaway. There is a significant break in the retail frontage after Budgens and the Police Station before pedestrians reach these uses. The town centre boundary could exclude the frontages west of Pulling Close and west of Budgens because uses within this area are not contiguous with the rest of the town centre and do not appear to function as part of the town centre.
- 3.41 Saved Policy S5 restricts the loss of Class A uses at ground floor level within the Faringdon town centre, but permits changes of use to Class A2 and A3 subject to two criteria relating to the function, character and appearance of frontages and amenity issues (noise and smells). Policy S6 encourages diversity on upper floors by maintaining and improving means of access.
- 3.42 Faringdon is a relatively small centre. The character and function of the centre would be vulnerable to a small number of changes of use, particularly in light of recent changes to the GPDO and the predominance of small shop units. A balance of retail and services uses should be retained in Faringdon to meet future customer's needs. Saved Policy S5 should be retained in order to provide this protection.
- 3.43 It is not necessary or appropriate to introduce primary and secondary frontages within Faringdon centres given the limited number of units and scale of the centre. There are no obvious concentrations of Class A1 and non-A1 uses.

- 3.44 Saved Policy S11 encourages proposals that lead to environmental improvements on the Park Road frontage. This area is located outside the Faringdon town centre boundary but is an important gateway to the town centre. The objectives of Policy S11 remain valid and consistent with the NPPF. Emerging development plan allocations in this area could provide more detail on what form of development and improvements could be achieved on a site by site basis.

### **Botley Local Service Centre**

- 3.45 Botley will be redeveloped and will provide a small number of shop premises. The mix of Class A1 to A5 uses within the development is not controlled via planning conditions, but the size and configuration of units proposed within the masterplan suggest a broad mix of uses with be attracted to the redeveloped centre.
- 3.46 Saved Policy S12 should continue to protect new Class A1 uses and Class A uses within the redeveloped centre at Botley, to ensure the new centre meets the needs of local residents. It is unnecessary to introduce primary and secondary frontages within Botley given the limited number of units and scale of the centre. The centre boundary should be tightly drawn around the new centre and Elms Parade.

### **Grove and Other Local Shopping Centres**

- 3.47 The Local Plan should continue to define the boundaries for both local shopping centres within Grove (Saved Policy S12) and for other local service centres. These boundaries will demonstrate where new retail and town centre uses of a local scale should be focused.
- 3.48 Saved Policy S12 should continue to protect Class A1 uses and Class A uses in general within these centres, and will ensure the needs of local residents are met.
- 3.49 It is not necessary or appropriate to introduce primary and secondary frontages within Grove or other local service centres given the limited number of units and scale of the centres.
- 3.50 The existing Local Plan defines centre boundaries for district and local centres, which are tightly drawn around the commercial areas. Based on the latest land use survey and shop vacancies, there are no reasons to change this approach.

### **Local and Village Shops**

- 3.51 Saved Policy S13 allows the development and extension of village and other small shops designed to meet the day to day needs of the local population provided they do not give rise to planning or highways problems. The policy objective appears to be to encourage new local shopping provision, whilst preventing larger scale development of more than local significance outside of the designated town and local service centres.

- 3.52 This policy is interrelated to Core Policy 32 within the Local Plan 2031: Part 1 relating to the sequential approach and impact tests. All retail development outside the designated town and local service centres are required to meet the sequential test and the impact test (if more than the locally set floorspace impact threshold).
- 3.53 The supporting text to Policy S13 does not specifically what is considered to be a “small shop”, but presumably “small” will be not more than the impact floorspace threshold contained within Core Policy 32. On the basis that all small shops will not be required to consider retail impact, the key effect of Policy S13 is to allow local shops to bypass the sequential approach.
- 3.54 The Council should consider linking Policy S13 to Core policy 32 and also consider the introduction of a maximum floorspace threshold that will be considered to be a small shop.
- 3.55 Policy S14 seeks to protect local shops and services, subject to criteria. This approach is consistent with paragraphs 28 and 70 of the NPPF. Paragraph 28 promotes the retention and development of local services. Paragraph 70 indicates that planning policies and decisions should plan positively for the provision of community facilities such as local shops and other local services to enhance the sustainability of communities. The NPPF also states that policies and decisions should:
- “guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the communities ability to meet its day to day needs.”*
- 3.56 Saved Policy S14 is wholly consistent with the NPPF.
- 3.57 Saved Policy S15 relates to new service/petrol filling stations including those with ancillary shops. New facilities should be located within existing settlements and villages subject to site specific constraints.
- 3.58 Criterion iv) of Policy S15 seeks to protect nearby village shops. Whilst the NPPF promotes the retention of local village shops it does not protect shops located outside a designated centre from commercial competition from a new nearby facility. This element of Policy S15 could be considered to be inconsistent with the NPPF.



4.0

## Update Retail and Leisure Capacity

### Introduction

4.1

This section updates the previous retail and leisure capacity analysis and tests various housing development scenarios. This section should be read alongside the RTCS 2013 and the Addendum 2014.

4.2

The Addendum 2014 updated population projections, based on a requirement for a further 7,430 additional homes over the Plan period, above the previous projections. The latest Oxfordshire County Council's Research and Intelligence Unit projections were applied and have been used to project population from 2011 to 2031. Table 1A in Appendix 2 shows the revised baseline population forecasts for the study area, based on the increased housing estimates. The distribution of population growth for each zone has been adjusted using assumptions based on the future location of strategic housing developments.

4.3

In addition to the baseline population projections in Table 1A, three alternative scenarios have been tested reflecting an additional 2,200 dwellings (phased between 2021 and 2031). Options 1, 2 and 3 are based on different development scenarios that will result in changes to the distribution of population growth between the study area zones. The revised population projections are shown in Tables 1B, 1C and 1D respectively in Appendix 2.

4.4

Updated expenditure growth forecasts are available and have been obtained from Experian (Retail Planner Briefing Note 14 – November 2016). This update is based on the latest (post Brexit) economic market conditions.

4.5

Appendix 1 sets out the updated methodology and data assumptions that have been applied in this Addendum.

### Population and Expenditure

4.6

The baseline scenario indicates that population within the study area is expected to increase between 2011 and 2031 by 39.3% (48,134 people). Around 12,000 of this population increase is allocated to the new Zone 7.

4.7

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 2031. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

4.8

As a consequence of growth in population and per capita spending, total available convenience goods spending within the study area is forecast to increase by 30.7% from £253.72 million in 2014 to £331.6 million in 2031, as shown in Table 3A, Appendix 2. This growth compares with the Addendum 2014, which showed an increase of 50% of convenience goods expenditure.

- 4.9 Experian's latest figures show a decrease in convenience goods expenditure per capita between 2014 to 2015 (actual figures) and lower forecast rates of growth in the future.
- 4.10 Total available comparison goods spending is forecast to increase by 112% between 2014 and 2031, increasing from £419.88 million in 2014 to £893.95 million in 2031, as shown in Table 3A, Appendix 3. This growth compares with 110% in the Addendum 2014.
- 4.11 These figures relate to real growth and exclude inflation. As explained in the methodology in Appendix 1, these figures exclude home/internet shopping, and the proportion of "non-store" expenditure or "special forms of trading" is forecast to increase over the period.

## **Base Year Spending Patterns 2014**

- 4.12 As in the Addendum 2014, the results of the household shopper questionnaire survey undertaken by NEMS in September 2012 have been used to estimate existing shopping patterns within the study area.

### **Convenience Shopping**

- 4.13 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 study area zone are shown in Table 4, Appendix 2.
- 4.14 The baseline level of convenience goods expenditure attracted to shops/stores in VOWH in 2014 is estimated to be £225.98 million as shown in Table 5, Appendix 2.
- 4.15 The total benchmark turnover of the existing convenience sales floorspace within the four main towns (Abingdon, Wantage, Botley and Faringdon) in VOWH District is £160.64 million (Table 11, Appendix 2). The benchmark turnover has reduced from £170.55 million as calculated within the Addendum 2014 due to the reduction in the company average sales density of some food store operators e.g. Tesco, Sainsbury's and Waitrose.
- 4.16 The actual turnover of this convenience floorspace is £208.48 million (Table 5, Appendix 2, minus the turnover of "other VOWH"). These figures suggest that collectively convenience retail facilities in the four main towns are trading about 30% above average. Within the District as a whole, in 2014 there is estimated to be a surplus of available convenience expenditure of £47.84 million (Table 12, Appendix 2).

### **Comparison Shopping**

- 4.17 The estimated comparison goods expenditure currently attracted by shopping facilities within VOWH District is £189.84 million in 2014, as shown in Table 5, Appendix 3. This revised figure is marginally higher than the Addendum 2014 estimate of £182.95 million, and there remains no evidence to suggest existing

comparison sales floorspace is over-trading in the District, or that there is surplus comparison expenditure available to support new development in 2014.

## **Commitments and Proposals**

- 4.18 There are a number of emerging convenience goods commitments and proposals in the District, as set out at the foot of Table 11B in Appendix 2. The comparison commitments are listed in Table 11 in Appendix 3.
- 4.19 The Abbey Shopping Centre and The Charter Development Brief includes a food store in Abingdon, and the redevelopment of this area remains an aspiration of the Council. However, there are concerns about the viability of a large food store in this location, and therefore options are also being considered for other types of mixed use. For the purposes of this assessment, we have made an assumption that it will be a food store, and based on the potential maximum size of a food store (6,500 sq.m gross), that it will have a net sales area of 4,200 sq.m, of which 2,730 sq.m is likely to comprise convenience goods floorspace.
- 4.20 The commitments include the redevelopment of the centre at Botley, which is expected to include a food store of 1,270 sq.m gross (assumed 889 sq.m net). The development will involve the demolition of Co-op, Tesco Express and Iceland. We have assumed around 25% of the new units (900 sq.m gross) will be occupied by convenience goods retail and 50% (1,800 sq.m gross) by comparison goods retail, with the remaining 25% occupied by non-retail services.
- 4.21 At Seacourt Tower Retail Park, Phase 1 (6,369 sq.m gross) has been completed post 2014 and is now occupied by Dreams, Decathlon and Sports Direct. Phase 2 will involve the loss of Homebase (4,212 sq.m gross) and the provision of new units to provide 7,255 sq.m gross.
- 4.22 Two new retail units are under construction in Faringdon for occupation by Aldi and a Little Waitrose (1,254 sq.m net and 650 sq.m net respectively).
- 4.23 West of Didcot, planning permission has been granted for an enlarged supermarket within a new district centre at Great Western Park, which will increase the floorspace of the proposed store from 1,000 sq.m gross to 2,375 sq.m gross (1,544 sq.m net sales area). This will be located within the new Zone 7 "Science Vale/West of Didcot" area to serve the new housing developments. Land has also been allocated (0.85ha) within the development to include two new local centres to serve the new dwellings. No floorspace has been specified for the local centres. These sites could accommodate around 4,000 sq.m gross, based on a 40%-50% development density. We have assumed 1,000 sq.m net of convenience goods sales floorspace and 750 sq.m net of comparison goods sales floorspace will be provided within these two local centres.

- 4.24 A new local centre is also proposed at Grove Airfield (3,400 sq.m gross). We have assumed 800 sq.m net of convenience goods sales floorspace and 500 sq.m net of comparison goods sales floorspace will be provided within the local centre.
- 4.25 Planning permission has been granted for 13,000 sq.m gross of Class A1 retail use at the former Didcot Power Station, of which 1,500 sq.m gross (1,200 sq.m net) is expected to be occupied by a food store. The remaining 11,500 sq.m gross floorspace is expected to be occupied by bulky goods retail warehousing.
- 4.26 Outside the District the implementation of other major development proposals is now more certain. The redevelopment of the Westgate Centre in Oxford is now under-construction and is expected to be completed in Autumn 2017. The mixed use development is over 70,000 sq.m gross and will include retail, restaurants/café's and a five screen cinema.
- 4.27 The Orchard Centre - Phase II expansion in Didcot will include 24 new retail units, 6 restaurants and a gym.
- 4.28 These pipeline developments within and outside the District will alter shopping patterns within the Vale of White Horse study area. The base year convenience goods market shares have been adjusted in Table 7 in Appendix 2, assuming all these proposals are implemented by 2021. The base year comparison goods market shares have been adjusted in Table 7 in Appendix 3, assuming all these proposals are implemented by 2021.

## **Capacity for Convenience Goods Floorspace**

- 4.29 The baseline levels of available convenience goods expenditure in 2016, 2021, 2026 and 2031 are shown at Tables 6, 8, 9 and 10 in Appendix 2.
- 4.30 The total level of convenience goods expenditure available for shops in the District between 2014 and 2031 is summarised in Table 12 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £225.98 million in 2014 to £289.35 million in 2031. The 2031 projection is lower than the Addendum 2014 estimate of £343.35 million in 2031 due to Experian's lower forecasts.
- 4.31 Table 12 subtracts the benchmark turnover of existing floorspace and pipeline commitments from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there was an expenditure surplus of £47.84 million convenience goods expenditure in 2014. This surplus has increased to £52.15 million in 2016.
- 4.32 The implementation of commitments shown in Table 11B and described above will reduce this surplus expenditure to £10.22 million in 2021. Continued future growth (primarily population growth) produces a surplus of £25.62 million in 2026 and £31.02 million in 2031.

- 4.33 The baseline surplus expenditure projections have been converted into potential new floorspace estimates in Table 13A. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq.m, based on the average turnover of the main food supermarket operators.
- 4.34 The surplus of available expenditure up to 2026 indicates that there is a medium term requirement for additional convenience goods floorspace in the District of 2,135 sq.m net (3,049 sq.m gross), over and above commitments. Surplus expenditure at 2031 could support 2,585 sq.m net of sales floorspace (3,692 sq.m gross) in the District as a whole, as shown in Table 13A, Appendix 2.
- 4.35 The Addendum 2014 suggested a convenience goods floorspace projection of 6,136 sq.m net (8,766 sq.m gross) at 2031, over and above commitments and based on adjusted market shares. The projections are lower primarily due to lower Experian expenditure projections.

## **Capacity for Comparison Goods Floorspace**

- 4.36 The baseline levels of available comparison goods expenditure in 2016, 2021, 2026 and 2031 are shown at Tables 6, 8, 9 and 10 in Appendix 3.
- 4.37 The total level of comparison goods expenditure available for shops in the District between 2014 and 2031 is summarised in Table 12 (Appendix 3). Comparison goods expenditure available to shopping facilities in the District is expected to increase from £189.64 million in 2014 to £398.72 million in 2031.
- 4.38 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (i.e. satisfactory levels), as shown in Table 12 (Appendix 3). Table 12 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum growth rate as recommended by Experian.
- 4.39 The projections indicate that growth in turnover efficiency and commitments will absorb expenditure growth up to and beyond 2021. There is a projected expenditure deficit of -£20.9 million at 2021. By 2026, future expenditure growth generates an expenditure surplus of £11.64 million, increasing to £41.59 million in 2031.
- 4.40 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 13A, Appendix 3, using an average sales density of £5,000 per sq.m in 2014. The surplus expenditure at 2026 could support 1,719 sq.m net (2,291 sq.m gross) comparison goods floorspace, or 6,447 sq.m net (8,596 sq.m gross) by 2031.
- 4.41 The Addendum 2014 suggested a comparison goods floorspace projection of 10,113 sq.m net (13,731 sq.m gross) at 2031, over and above commitments and based on adjusted market shares. The projections are lower primarily due to the expected impact of pipeline developments in Didcot (Orchard Centre Phase II and at Didcot Power Station).

## Sensitivity Analysis

- 4.42 The implications of alternative residential development scenarios on the retail floorspace projections have been assessed. As indicated earlier, three alternative scenarios have been tested reflecting an additional 2,200 dwellings. Options 1, 2 and 3 are based on different distributions of development. The revised population projections are shown in Tables 1B, 1C and 1D respectively in Appendix 2.
- 4.43 The revised convenience goods floorspace projections are summarised in Tables 13B to 13D in Appendix 2. The revised comparison goods floorspace projections are summarised in Tables 13B to 13D in Appendix 3.
- 4.44 The sensitivity analysis shows an insignificant variation in floorspace projections for option 1, 2 and 3. The results for projections up to 2013 are summarised in Table 4.1.

Table 4.1: District Wide Retail Floorspace Projections Sensitivity Analysis

	Additional Retail Sales Floorspace sq.m net by 2031			
	Baseline	Option 1	Option 2	Option 2
Convenience Goods	2,585	3,334	3,389	3,377
Comparison Goods	7,432	7,938	7,978	7,976

Source: Tables 13A to 13D, Appendix 2 and Appendix 3

- 4.45 For convenience goods, the alternative options are around 29% higher (an additional 750 to 800 sq.m net) than the baseline estimates due to the additional 2,200 dwellings at 2031. The variation between Option 1 to 3 is very small i.e. only 55 sq.m net.
- 4.46 For comparison goods, the alternative options are around 7% higher (an additional 500 to 550 sq.m net) than the baseline estimates. The variation is less significant for comparison goods because most of the growth for convenience goods relates to population growth, whilst comparison goods projections are fuelled by a combination of population growth and expenditure per capita growth.

## Commercial Leisure

- 4.47 The RTCS 2013 identified limited scope for commercial leisure development within the District due to the proximity of facilities outside the District. The assessment identified a requirement to provide an additional health and fitness facility and two cinema screens and around 400 seats.
- 4.48 The RTCS 2013 suggested the growth in adult population within the VOWH study area (15,100 between 2012 and 2029) would generate around 1,800 new health club members, of which 1,370 (76%) would be retained in the District.

- 4.49 The growth in adult population between 2014 and 2031 is likely to be higher at around 36,000, which would generate about 4,300 members of which about 3,300 could be retained within the District. The revised figures suggest there could be scope for 2-3 health and fitness facilities over the plan period.
- 4.50 The baseline study area population at 2031 is 170,686. Based on the national average (2.6 trips per person) this population will generate 443,800 cinema trips per annum. If the District can retain 40% of these trips 177,500 then there is theoretical capacity for 4.2 screens, based on the national average of 42,000 trips per screen, or 826 seats based on 215 trips per seat. As before, the proximity and availability of cinemas in the nearby centres of Oxford, Didcot and Swindon, affect the commercial viability of a small cinema within the District. There is no need to allocate a site for a cinema in the District, however if a development proposals emerged the benefits of a new cinema should be considered favourably.
- 4.51 The RTCS 2013 indicated a Class A1 retail floorspace projection up to 2029 (over and above commitments) of 21,500 sq.m gross. The RTCS suggested a further 20% could be provided to accommodate Class A3 to A5 uses, i.e. around 4,300 sq.m gross of A3-A5 floorspace.
- 4.52 The revised baseline Class A1 floorspace projection for 2014 to 2031 is 13,600 sq.m over and above commitments. If a further 20% is provided for Class A3-A5 uses then an additional 2,700 sq.m gross would be required over and above commitments.

5.0

## Conclusions and Recommendations

### Policy Review

5.1

Saved frontage policies are still required in VOWH to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity. The designation of primary and secondary frontages remains an appropriate approach in Abingdon and Wantage. Saved Policies S2 and S3 provide sufficient flexibility to allow non-retail uses to secure representation in these town centres, where the proposed use would not be harmful to the town centres vitality and viability or residential amenity.

5.2

In Faringdon and Grove, there are no obvious areas where there is a predominance of Class A1 retail use and a single centre boundary should continue to be defined rather than primary and secondary frontages. A summary of the potential amendments to saved policies is shown overleaf.

5.3

In general, our analysis indicates that most of the saved policies remain fit for purpose and sound.



Saved Policy	Potential Amendments
S2 – Primary Shopping Frontages	<p>No recommended change to the approach.</p> <p>Consider re-designating the primary shopping frontages on Mill Street as secondary shopping frontages in Wantage.</p> <p>New primary shopping frontages should be designated at King's Walk to protect the new Class A1 retail.</p> <p>New primary shopping frontages should be designated in the Limbrough Road Area to protect the new Class A1 retail.</p>
S3 – Secondary Shopping Frontages	<p>No recommended change to the general approach.</p> <p>The Square and Ock Street could be designated as secondary frontage in Abingdon.</p> <p>Arbery Arcade in Wantage could be designated as secondary frontage.</p>
S4 – Uses outside Shopping Frontages	No recommended change to the approach.
S5 – Uses in Faringdon Town Centre	No recommended change to the approach.
S6 – Access to Upper Floors	No recommended change to the approach.
S8 – Limbrough Road Area	Policy deleted following implementation, but new primary shopping frontages designated to protect new Class A1 retail uses.
S10 – Ock Street Area	<p>Consistent with the NPPF because objectives beneficial to the vitality and viability of the centre.</p> <p>Potential for site allocations could be considered.</p>
S11 – Park Road Frontage	<p>Consistent with the NPPF because objectives beneficial to the vitality and viability of the centre.</p> <p>Potential for site allocations could be considered.</p>
S12 – Uses in Local Shopping Centres	<p>No recommended change to the approach.</p> <p>New centre at Botley should be protected by S12.</p>
S13 – Village and Small Shops	No recommended change to the approach. Consider maximum threshold for development serving local needs. Needs to link with Core Policy 32.
S14 - Loss of Village Shops	No recommended change to the approach.

S15 - Petrol Filling Stations

Consider the deletion of Criterion (iv)

## Updated Retail Floorspace Capacity

5.4

The updated quantitative assessment of the potential capacity for new retail floorspace continues to indicate there is scope for new retail development within VOWH, albeit lower capacity than that identified in the Addendum 2014. Tables 5.1 and 5.2 below indicate the distribution of the new convenience and comparison goods the baseline (excluding new allocations) floorspace projections for each centre/location (over and above commitments/proposals).

Table 5.1: Convenience Goods Retail Floorspace Baseline Projections

Location	Commitments / Proposals sq.m net	Additional Retail Sales Floorspace sq.m net			
		2014-2021	2021-2026	2026-2031	Total 2014-2031
Abingdon	2,730	620	507	125	1,252
Wantage/Grove	800	791	229	36	1,056
Botley	-	53	35	-	88
Faringdon	1,621	-	-	-	-
Other VOWH	-	118	94	36	248
Science Vale/ West of Didcot	2,185	-	-	128	128
<b>Total</b>	<b>7,336</b>	<b>1,582</b>	<b>865</b>	<b>325</b>	<b>2,772</b>

Table 5.2: Comparison Goods Retail Floorspace Projections

Location	Commitments / Proposals sq.m net	Additional Retail Sales Floorspace sq.m net			
		2014-2021	2021-2026	2026-2031	Total 2014-2031
Abingdon	1,470	-	2,465	2,303	4,768
Wantage/Grove	500	211	1,075	777	2,063
Botley	3,510	-	-	-	-
Seacourt Tower Retail Park	8,500	-	-	-	-
Faringdon	283	-	14	123	137
Other VOWH	-	211	123	93	427
Science Vale/ West of Didcot	1,059	-	13	370	383
<b>Total</b>	<b>15,322</b>	<b>422</b>	<b>3,690</b>	<b>3,666</b>	<b>7,778</b>

Source: Tables 13A, Appendix 2 and Appendix 3

- 5.5            The floorspace projections in Tables 5.1 and 5.2 do not take into account the re-occupation of vacant floorspace.



# Appendix 1 Methodology

## **Retail Capacity Assessment – Methodology and Data**

### **Price Base**

- 1 All monetary values expressed in this study are at 2012 prices, consistent with the RTCS 2013 and the Addendum 2014.

### **Study Area**

- 2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the Vale of White Horse. The study area is sub-divided into six zones based on postal sector boundaries as shown above. The survey zones take into consideration the extent of the catchment area of the main centres in the Vale of White Horse.
- 3 A new zone “Science Vale/West of Didcot” has been added into this assessment in order to assess the retail requirements associated with the strategic housing developments proposed in this area.

### **Retail Expenditure**

- 4 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian’s local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012, as adopted in the Addendum 2014, have been used to project to 2014 and beyond.
- 5 Experian’s EBS national expenditure information (Experian Retail Planner Briefing Note 14 – November 2015) 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.
- 6 Experian’s EBS growth forecast rates for 2015 to 2018 reflect the current economic circumstances and post Brexit forecasts. Experian provides an appropriate growth rate for the short term (for convenience goods: -0% for 2015 to 2016, -0.2% for 2016 to 2017 and -0.9% for 2018; for comparison goods: +3.3% for 2015-2016, +1.4% for 2016-2017 and +1.0% for 2018).
- 7 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% per annum for convenience goods between 2019 to 2023, and 0.1% per annum after 2023. For comparison goods Experian

- recommends a growth rate of 3% per annum between 2019 to 2023, and 3.2% per annum after 2023.
- 8 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.
  - 9 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 2015 is:
    - 8.9% of convenience goods expenditure; and
    - 16.0% of comparison goods expenditure.
  - 10 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 2015 are:
    - 2.7% of convenience goods expenditure; and
    - 12.0% of comparison goods expenditure.
  - 11 The projections provided by Experian suggest that these percentages will increase to 3.9% and 15.6% by 2021 respectively. In the longer term, the growth is predicted to fall or reverse slightly for comparison goods. The long term projections are 5% and 16.3% by 2031. These figures have been adopted in this assessment.
  - 12 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.

- 13 On-line shopping has experienced rapid growth over the last 20 years, 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. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.6% by 2022, rising to 20.4% by the mid-2030s.
- 14 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**

- 15 All 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 2012 household survey. The total turnover of shops within the 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 Mintel Retail Rankings 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**

- 16 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. 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.
- 17 The estimated convenience goods sales areas have been derived from a combination of the Institute of Grocery Distribution (IGD), GOAD plans and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.



- 18 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 the District and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the South East.
- 19 The total benchmark turnover of identified convenience sales floorspace within the District's centres has been updated using the most recent sales density information and is estimated to be £160.64 million (Table 11, Appendix 2).
- 20 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m.

## Appendix 2 Convenience Goods Capacity

Table 1A: Study Area Population - Baseline

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,261	26,837	27,338
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,410	17,198	17,272
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,635	38,118	37,991
Zone 6: Faringdon	18,885	19,302	20,167	23,636	25,215	25,796
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,970	8,520	12,075
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>154,730</b>	<b>165,944</b>	<b>170,686</b>

Table 1B: Study Area Population - Option 1

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,261	26,837	27,338
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,870	19,958	22,332
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,635	38,118	37,991
Zone 6: Faringdon	18,885	19,302	20,167	23,636	25,215	25,796
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,970	8,520	12,075
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,190</b>	<b>168,704</b>	<b>175,746</b>

Table 1C: Study Area Population - Option 2

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,371	27,496	28,546
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,729	19,111	20,779
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,666	38,306	38,336
Zone 6: Faringdon	18,885	19,302	20,167	23,698	25,591	26,486
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,908	8,144	11,385
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,190</b>	<b>168,704</b>	<b>175,746</b>

Table 1D: Study Area Population - Option 3

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,303	27,088	27,798
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,765	19,331	21,182
Zone 4: Botley	15,420	15,760	16,224	18,480	19,319	19,344
Zone 5: Wantage	30,463	31,135	32,106	36,666	38,306	38,336
Zone 6: Faringdon	18,885	19,302	20,167	23,698	25,591	26,486
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,908	8,144	11,385
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,189</b>	<b>168,704</b>	<b>175,746</b>

Experian 2011 (Census data)  
Oxfordshire County Council's Research and Intelligence Unit for Vale of White Horse District Council  
Scenario 3: LPP1 and 2, ADCON, and large and small sites

**Table 2: Convenience Goods Expenditure per person (£)**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	1,891	1,859	1,821	1,813	1,815
Zone 2: Abingdon Rural East	2,008	1,974	1,934	1,926	1,928
Zone 3: Abingdon Rural West	1,963	1,929	1,890	1,882	1,884
Zone 4: Botley	2,202	2,164	2,121	2,112	2,113
Zone 5: Wantage	2,057	2,022	1,981	1,973	1,974
Zone 6: Faringdon	2,043	2,008	1,967	1,959	1,960
Zone 7: Science Vale/West of Didcot	n/a	1,998	1,958	1,949	1,951

*Sources:**Experian Local Expenditure 2012 (2012 prices)**Growth Rates: -0.6% 2013, -1.7% 2014, -1.1% 2015, 0% 2016, -0.2% 2017, -0.9% 2019, 0.0% p.a. 2019-23 and +0.1% after 2023.**Excludes Special Forms of Trading**Zone 7 assumes average of Zones 2 and 5*

**Table 3A: Total Convenience Goods Expenditure (£m) - Baseline**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	39.28	40.25	46.01	48.67	49.62
Zone 2: Abingdon Rural East	49.20	50.18	56.81	59.56	60.17
Zone 3: Abingdon Rural West	27.07	27.53	31.02	32.37	32.53
Zone 4: Botley	34.70	35.12	39.13	40.40	40.15
Zone 5: Wantage	64.05	64.91	72.58	75.19	75.00
Zone 6: Faringdon	39.43	40.49	46.50	49.39	50.57
Zone 7: Science Vale/West of Didcot	n/a	2.84	9.73	16.61	23.56
<b>Total</b>	<b>253.72</b>	<b>261.32</b>	<b>301.77</b>	<b>322.19</b>	<b>331.60</b>

Source: Tables 1A and 2

**Table 3B: Total Convenience Goods Expenditure (£m) - Option 1**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	39.28	40.25	46.01	48.67	49.62
Zone 2: Abingdon Rural East	49.20	50.18	56.81	59.56	60.17
Zone 3: Abingdon Rural West	27.07	27.53	31.89	37.56	42.06
Zone 4: Botley	34.70	35.12	39.13	40.40	40.15
Zone 5: Wantage	64.05	64.91	72.58	75.19	75.00
Zone 6: Faringdon	39.43	40.49	46.50	49.39	50.57
Zone 7: Science Vale/West of Didcot	n/a	2.84	9.73	16.61	23.56
<b>Total</b>	<b>253.72</b>	<b>261.32</b>	<b>302.64</b>	<b>327.38</b>	<b>341.13</b>

Source: Tables 1B and 2

**Table 3C: Total Convenience Goods Expenditure (£m) - Option 2**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	39.28	40.25	46.21	49.86	51.81
Zone 2: Abingdon Rural East	49.20	50.18	56.81	59.56	60.17
Zone 3: Abingdon Rural West	27.07	27.53	31.62	35.97	39.14
Zone 4: Botley	34.70	35.12	39.13	40.40	40.15
Zone 5: Wantage	64.05	64.91	72.64	75.56	75.68
Zone 6: Faringdon	39.43	40.49	46.62	50.13	51.92
Zone 7: Science Vale/West of Didcot	n/a	2.84	9.61	15.88	22.21
<b>Total</b>	<b>253.72</b>	<b>261.32</b>	<b>302.63</b>	<b>327.36</b>	<b>341.08</b>

Source: Tables 1C and 2

**Table 3D: Total Convenience Goods Expenditure (£m) - Option 3**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	39.28	40.25	46.08	49.12	50.45
Zone 2: Abingdon Rural East	49.20	50.18	56.81	59.56	60.17
Zone 3: Abingdon Rural West	27.07	27.53	31.69	36.38	39.90
Zone 4: Botley	34.70	35.12	39.19	40.80	40.88
Zone 5: Wantage	64.05	64.91	72.64	75.56	75.68
Zone 6: Faringdon	39.43	40.49	46.62	50.13	51.92
Zone 7: Science Vale/West of Didcot	n/a	2.84	9.61	15.88	22.21
<b>Total</b>	<b>253.72</b>	<b>261.32</b>	<b>302.64</b>	<b>327.43</b>	<b>341.21</b>

Source: Tables 1D and 2

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

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	% Inflow
<b>Abingdon</b>								
Waitrose	20.7%	32.4%	13.5%	11.4%	0.3%	0.3%	1.5%	10.0%
Tesco Extra	39.5%	24.7%	37.7%	11.7%	3.9%	1.2%	3.0%	10.0%
Other Abingdon Shops	26.0%	17.8%	9.7%	2.0%	0.0%	0.0%	0.0%	10.0%
<b>Sub-Total</b>	<b>86.2%</b>	<b>74.9%</b>	<b>60.9%</b>	<b>25.1%</b>	<b>4.2%</b>	<b>1.5%</b>	<b>4.5%</b>	
<b>Wantage</b>								
Sainsbury's	1.7%	0.0%	2.6%	0.0%	38.0%	5.7%	2.3%	10.0%
Waitrose	0.0%	0.0%	0.0%	0.0%	24.3%	2.9%	4.1%	10.0%
Other Wantage/Grove	0.7%	0.0%	0.0%	0.0%	15.9%	0.6%	0.0%	10.0%
<b>Sub-Total</b>	<b>2.4%</b>	<b>0.0%</b>	<b>2.6%</b>	<b>0.0%</b>	<b>78.2%</b>	<b>9.2%</b>	<b>6.4%</b>	
<b>Other VOWH</b>								
Botley	0.3%	0.0%	1.7%	27.2%	0.2%	0.3%	0.0%	20.0%
Faringdon	0.0%	0.6%	3.0%	0.0%	3.0%	50.0%	0.0%	5.0%
Other VOWH	0.9%	4.8%	17.3%	6.7%	1.6%	14.9%	3.2%	5.0%
Science Vale/West of Didcot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Sub-Total</b>	<b>1.2%</b>	<b>5.4%</b>	<b>22.0%</b>	<b>33.9%</b>	<b>4.8%</b>	<b>65.2%</b>	<b>3.2%</b>	
<b>VOWH District Total</b>	<b>89.8%</b>	<b>80.3%</b>	<b>85.5%</b>	<b>59.0%</b>	<b>87.2%</b>	<b>75.9%</b>	<b>14.1%</b>	
Food Stores in Oxford	7.9%	9.4%	4.8%	37.5%	0.1%	0.3%	0.0%	n/a
Food Stores in Didcot	1.4%	8.4%	1.5%	0.0%	10.5%	0.0%	83.8%	n/a
Food Stores in Swindon	0.0%	0.0%	2.0%	0.0%	0.6%	20.0%	0.0%	n/a
Other	0.9%	1.9%	6.2%	3.5%	1.6%	3.8%	2.1%	n/a
<b>Other Sub-Total</b>	<b>10.2%</b>	<b>19.7%</b>	<b>14.5%</b>	<b>41.0%</b>	<b>12.8%</b>	<b>24.1%</b>	<b>85.9%</b>	
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
<b>Expenditure 2014</b>	<b>39.28</b>	<b>49.20</b>	<b>27.07</b>	<b>34.70</b>	<b>64.05</b>	<b>39.43</b>		
<b>Abingdon</b>								
Waitrose	8.13	15.94	3.65	3.96	0.19	0.12	3.55	35.55
Tesco Extra	15.52	12.15	10.20	4.06	2.50	0.47	4.99	49.89
Other Abingdon Shops	10.21	8.76	2.63	0.69	0.00	0.00	2.48	24.77
<b>Sub-Total</b>	<b>33.86</b>	<b>36.85</b>	<b>16.48</b>	<b>8.71</b>	<b>2.69</b>	<b>0.59</b>	<b>11.02</b>	<b>110.21</b>
<b>Wantage</b>								
Sainsbury's	0.67	0.00	0.70	0.00	24.34	2.25	3.11	31.06
Waitrose	0.00	0.00	0.00	0.00	15.56	1.14	1.86	18.56
Other Wantage/Grove	0.27	0.00	0.00	0.00	10.18	0.24	1.19	11.88
<b>Sub-Total</b>	<b>0.94</b>	<b>0.00</b>	<b>0.70</b>	<b>0.00</b>	<b>50.08</b>	<b>3.63</b>	<b>6.15</b>	<b>61.51</b>
<b>Other VOWH</b>								
Botley	0.12	0.00	0.46	9.44	0.13	0.12	2.57	12.83
Faringdon	0.00	0.30	0.81	0.00	1.92	19.71	1.20	23.94
Other VOWH	0.35	2.36	4.68	2.33	1.02	5.87	0.87	17.50
<b>Sub-Total</b>	<b>0.47</b>	<b>2.66</b>	<b>5.95</b>	<b>11.76</b>	<b>3.07</b>	<b>25.71</b>	<b>4.64</b>	<b>54.27</b>
<b>VOWH District Total</b>	<b>35.27</b>	<b>39.51</b>	<b>23.14</b>	<b>20.48</b>	<b>55.85</b>	<b>29.93</b>	<b>21.81</b>	<b>225.98</b>
Food Stores in Oxford	3.10	4.62	1.30	13.01	0.06	0.12	n/a	22.22
Food Stores in Didcot	0.55	4.13	0.41	0.00	6.72	0.00	n/a	11.81
Food Stores in Swindon	0.00	0.00	0.54	0.00	0.38	7.89	n/a	8.81
Other	0.35	0.93	1.68	1.21	1.02	1.50	n/a	6.70
<b>Other Sub-Total</b>	<b>4.01</b>	<b>9.69</b>	<b>3.92</b>	<b>14.23</b>	<b>8.20</b>	<b>9.50</b>		<b>49.55</b>
<b>TOTAL</b>	<b>39.28</b>	<b>49.20</b>	<b>27.07</b>	<b>34.70</b>	<b>64.05</b>	<b>39.43</b>		<b>275.53</b>

Source: Table 3 and 4

Table 6: Convenience Goods Expenditure 2016 (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2016</b>	<b>40.25</b>	<b>50.18</b>	<b>27.53</b>	<b>35.12</b>	<b>64.91</b>	<b>40.49</b>	<b>2.84</b>		
<b>Abingdon</b>									
Waitrose	8.33	16.26	3.72	4.00	0.19	0.12	0.04	3.67	36.30
Tesco Extra	15.90	12.39	10.38	4.11	2.53	0.49	0.09	5.09	50.89
Other Abingdon Shops	10.46	8.93	2.67	0.70	0.00	0.00	0.00	2.53	25.30
<b>Sub-Total</b>	<b>34.69</b>	<b>37.58</b>	<b>16.77</b>	<b>8.81</b>	<b>2.73</b>	<b>0.61</b>	<b>0.13</b>	<b>11.29</b>	<b>112.48</b>
<b>Wantage</b>									
Sainsbury's	0.68	0.00	0.72	0.00	24.67	2.31	0.07	3.15	31.53
Waitrose	0.00	0.00	0.00	0.00	15.77	1.17	0.12	1.88	18.83
Other Wantage/Grove	0.28	0.00	0.00	0.00	10.32	0.24	0.00	1.21	12.05
<b>Sub-Total</b>	<b>0.97</b>	<b>0.00</b>	<b>0.72</b>	<b>0.00</b>	<b>50.76</b>	<b>3.73</b>	<b>0.18</b>	<b>6.24</b>	<b>62.41</b>
<b>Other VOWH</b>									
Botley	0.12	0.00	0.47	9.55	0.13	0.12	0.00	2.60	12.99
Faringdon	0.00	0.30	0.83	0.00	1.95	20.25	0.00	1.23	24.55
Other VOWH	0.36	2.41	4.76	2.35	1.04	6.03	0.09	0.89	17.85
<b>Sub-Total</b>	<b>0.48</b>	<b>2.71</b>	<b>6.06</b>	<b>11.90</b>	<b>3.12</b>	<b>26.40</b>	<b>0.09</b>	<b>4.72</b>	<b>55.39</b>
<b>VOWH District Total</b>	<b>36.14</b>	<b>40.29</b>	<b>23.54</b>	<b>20.72</b>	<b>56.61</b>	<b>30.73</b>	<b>0.40</b>	<b>22.25</b>	<b>230.28</b>
Food Stores in Oxford	3.18	4.72	1.32	13.17	0.06	0.12	0.00	n/a	22.57
Food Stores in Didcot	0.56	4.21	0.41	0.00	6.82	0.00	2.38	n/a	12.01
Food Stores in Swindon	0.00	0.00	0.55	0.00	0.39	8.10	0.00	n/a	9.04
Other	0.36	0.95	1.71	1.23	1.04	1.54	0.06	n/a	6.83
<b>Other Sub-Total</b>	<b>4.11</b>	<b>9.88</b>	<b>3.99</b>	<b>14.40</b>	<b>8.31</b>	<b>9.76</b>	<b>2.44</b>		<b>50.45</b>
<b>TOTAL</b>	<b>40.25</b>	<b>50.18</b>	<b>27.53</b>	<b>35.12</b>	<b>64.91</b>	<b>40.49</b>	<b>2.84</b>		<b>280.73</b>

Source: Table 3A and 4

Table 7: Future Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	% Inflow
Abingdon	86.8%	64.7%	60.7%	24.3%	5.0%	1.2%	1.3%	10.0%
Wantage/Grove	2.1%	0.0%	2.0%	0.0%	69.1%	5.0%	6.3%	10.0%
Botley	0.3%	0.0%	1.7%	28.0%	0.2%	0.3%	0.0%	20.0%
Faringdon	0.0%	0.8%	3.9%	0.0%	3.6%	60.0%	0.0%	5.0%
Other VOWH	0.9%	4.6%	14.3%	6.7%	1.5%	14.0%	2.9%	5.0%
Science Vale/West of Didcot	0.0%	10.0%	3.0%	0.0%	10.0%	0.0%	30.0%	10.0%
<b>Sub-Total</b>	<b>90.1%</b>	<b>80.1%</b>	<b>85.6%</b>	<b>59.0%</b>	<b>89.4%</b>	<b>80.5%</b>	<b>40.5%</b>	
Food Stores in Oxford	7.6%	8.9%	4.7%	37.5%	0.1%	0.3%	0.0%	n/a
Food Stores in Didcot	1.4%	9.2%	1.5%	0.0%	8.4%	0.0%	57.5%	n/a
Food Stores in Swindon	0.0%	0.0%	2.0%	0.0%	0.6%	16.0%	0.0%	n/a
Other	0.9%	1.8%	6.2%	3.5%	1.5%	3.2%	2.0%	n/a
<b>Other Sub-Total</b>	<b>9.9%</b>	<b>19.9%</b>	<b>14.4%</b>	<b>41.0%</b>	<b>10.6%</b>	<b>19.5%</b>	<b>59.5%</b>	
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table 8: Convenience Goods Expenditure 2021 (£m) - Baseline

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2021</b>	<b>46.01</b>	<b>56.81</b>	<b>31.02</b>	<b>39.13</b>	<b>72.58</b>	<b>46.50</b>	<b>9.73</b>		
Abingdon	39.93	36.76	18.83	9.51	3.63	0.56	0.13	12.15	121.49
Wantage	0.97	0.00	0.62	0.00	50.15	2.32	0.61	6.08	60.75
Botley	0.14	0.00	0.53	10.96	0.15	0.14	0.00	2.98	14.88
Faringdon	0.00	0.45	1.21	0.00	2.61	27.90	0.00	1.69	33.87
Other VOWH	0.41	2.61	4.44	2.62	1.09	6.51	0.28	0.95	18.91
Science Vale/West of Didcot	0.00	5.68	0.93	0.00	7.26	0.00	2.92	1.87	18.65
<b>VOWH District Total</b>	<b>41.45</b>	<b>45.50</b>	<b>26.55</b>	<b>23.08</b>	<b>64.88</b>	<b>37.43</b>	<b>3.94</b>	<b>25.70</b>	<b>268.56</b>
Food Stores in Oxford	3.50	5.06	1.46	14.67	0.07	0.14	0.00	n/a	24.89
Food Stores in Didcot	0.64	5.23	0.47	0.00	6.10	0.00	5.59	n/a	18.03
Food Stores in Swindon	0.00	0.00	0.62	0.00	0.44	7.44	0.00	n/a	8.50
Other	0.41	1.02	1.92	1.37	1.09	1.49	0.19	n/a	7.50
<b>Other Sub-Total</b>	<b>4.55</b>	<b>11.31</b>	<b>4.47</b>	<b>16.04</b>	<b>7.69</b>	<b>9.07</b>	<b>5.79</b>		<b>58.92</b>
<b>TOTAL</b>	<b>46.01</b>	<b>56.81</b>	<b>31.02</b>	<b>39.13</b>	<b>72.58</b>	<b>46.50</b>	<b>9.73</b>		<b>327.47</b>

Source: Table 3A and 7

Table 9: Convenience Goods Expenditure 2026 (£m) - Baseline

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2026</b>	<b>48.67</b>	<b>59.56</b>	<b>32.37</b>	<b>40.40</b>	<b>75.19</b>	<b>49.39</b>	<b>16.61</b>		
Abingdon	42.24	38.54	19.65	9.82	3.76	0.59	0.22	12.76	127.57
Wantage	1.02	0.00	0.65	0.00	51.96	2.47	1.05	6.35	63.49
Botley	0.15	0.00	0.55	11.31	0.15	0.15	0.00	3.08	15.38
Faringdon	0.00	0.48	1.26	0.00	2.71	29.64	0.00	1.79	35.88
Other VOWH	0.44	2.74	4.63	2.71	1.13	6.92	0.48	1.00	20.04
Science Vale/West of Didcot	0.00	5.96	0.97	0.00	7.52	0.00	4.98	2.16	21.59
<b>VOWH District Total</b>	<b>43.85</b>	<b>47.71</b>	<b>27.71</b>	<b>23.83</b>	<b>67.22</b>	<b>39.76</b>	<b>6.73</b>	<b>27.14</b>	<b>283.95</b>
Food Stores in Oxford	3.70	5.30	1.52	15.15	0.08	0.15	0.00	n/a	25.89
Food Stores in Didcot	0.68	5.48	0.49	0.00	6.32	0.00	9.55	n/a	22.51
Food Stores in Swindon	0.00	0.00	0.65	0.00	0.45	7.90	0.00	n/a	9.00
Other	0.44	1.07	2.01	1.41	1.13	1.58	0.33	n/a	7.97
<b>Other Sub-Total</b>	<b>4.82</b>	<b>11.85</b>	<b>4.66</b>	<b>16.56</b>	<b>7.97</b>	<b>9.63</b>	<b>9.88</b>		<b>65.38</b>
<b>TOTAL</b>	<b>48.67</b>	<b>59.56</b>	<b>32.37</b>	<b>40.40</b>	<b>75.19</b>	<b>49.39</b>	<b>16.61</b>		<b>349.33</b>

Source: Table 3A and 7

Table 10: Convenience Goods Expenditure 2031 (£m) - Baseline

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2031</b>	<b>49.62</b>	<b>60.17</b>	<b>32.53</b>	<b>40.15</b>	<b>75.00</b>	<b>50.57</b>	<b>23.56</b>		
Abingdon	43.07	38.93	19.75	9.76	3.75	0.61	0.31	12.91	129.07
Wantage	1.04	0.00	0.65	0.00	51.83	2.53	1.48	6.39	63.92
Botley	0.15	0.00	0.55	11.24	0.15	0.15	0.00	3.06	15.31
Faringdon	0.00	0.48	1.27	0.00	2.70	30.34	0.00	1.83	36.62
Other VOWH	0.45	2.77	4.65	2.69	1.13	7.08	0.68	1.02	20.47
Science Vale/West of Didcot	0.00	6.02	0.98	0.00	7.50	0.00	7.07	2.40	23.96
<b>VOWH District Total</b>	<b>44.70</b>	<b>48.19</b>	<b>27.85</b>	<b>23.69</b>	<b>67.05</b>	<b>40.71</b>	<b>9.54</b>	<b>27.61</b>	<b>289.35</b>
Food Stores in Oxford	3.77	5.35	1.53	15.06	0.08	0.15	0.00	n/a	25.94
Food Stores in Didcot	0.69	5.54	0.49	0.00	6.30	0.00	13.54	n/a	26.56
Food Stores in Swindon	0.00	0.00	0.65	0.00	0.45	8.09	0.00	n/a	9.19
Other	0.45	1.08	2.02	1.41	1.13	1.62	0.47	n/a	8.17
<b>Other Sub-Total</b>	<b>4.91</b>	<b>11.97</b>	<b>4.68</b>	<b>16.46</b>	<b>7.95</b>	<b>9.86</b>	<b>14.02</b>		<b>69.86</b>
<b>TOTAL</b>	<b>49.62</b>	<b>60.17</b>	<b>32.53</b>	<b>40.15</b>	<b>75.00</b>	<b>50.57</b>	<b>23.56</b>		<b>359.21</b>

Source: Table 3A and 7



Table 11A: Base Year Convenience Goods Floorspace and Benchmark Turnover

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
<b>Abingdon</b>					
Waitrose	2,466	85%	2,096	£11,084	£23.23
Co-op, Bury Street	613	90%	552	£8,460	£4.67
Co-op, West St Helen Street	300	95%	285	£8,460	£2.41
Budgens, Peachcroft Shopping Centre	465	90%	419	£7,000	£2.93
Budgens, Northcourt Road	279	95%	265	£7,000	£1.86
Tesco Extra	6,888	55%	3,788	£10,507	£39.80
Tesco Express, Wootton Road	139	95%	132	£10,507	£1.39
Tesco Express, Oxford Road	150	95%	143	£10,507	£1.50
Other Abingdon town centre shops	700	100%	700	£5,000	£3.50
<b>Total</b>	<b>12,000</b>		<b>8,379</b>		<b>£81.29</b>
<b>Wantage</b>					
Sainsbury's	2,870	80%	2,296	£11,108	£25.50
Waitrose	1,050	90%	945	£11,084	£10.47
Tesco Express, Grove	336	90%	302	£10,507	£3.17
Co-op, Grove	100	95%	95	£8,460	£0.80
Other Grove	280	100%	280	£5,000	£1.40
Other Wantage	700	100%	700	£5,000	£3.50
<b>Total</b>	<b>5,336</b>		<b>4,618</b>		<b>£44.86</b>
<b>Botley</b>					
Co-op	1,161	80%	929	£8,460	£7.86
Iceland	317	95%	301	£7,644	£2.30
Tesco Express	250	95%	238	£10,507	£2.50
Other Botley	170	100%	170	£5,000	£0.85
<b>Total</b>	<b>1,898</b>		<b>1,637</b>		<b>£13.51</b>
<b>Faringdon</b>					
Budgens	1,027	90%	924	£7,000	£6.47
Tesco	1,404	90%	1,264	£10,507	£13.28
Other Faringdon	250	100%	250	£5,000	£1.25
<b>Total</b>	<b>2,681</b>		<b>2,438</b>		<b>£21.00</b>
<b>VOWH District Total</b>	<b>21,915</b>		<b>17,073</b>		<b>£160.64</b>

Source: Goad, IGD, Mintel 2015 and VOWH District Council

Table 11B: Convenience Goods Commitments and Benchmark Turnover

	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
<b>Abingdon</b>					
Abbey Shopping Centre SPD Food Store	4,200	65%	2,730	£12,000	£32.76
<b>Botley - Gains</b>					
Botley, Westway - supermarket	889	90%	800	£12,000	£9.60
Botley, Westway - other convenience (25%)	500	95%	475	£8,000	£3.80
<b>Botley - Losses</b>					
Co-op	1,161	80%	929	£8,460	£7.86
Iceland	317	95%	301	£7,644	£2.30
Tesco Express	250	95%	238	£10,507	£2.50
<b>Sub-total</b>	<b>-339</b>		<b>-192</b>		<b>£0.75</b>
<b>Faringdon</b>					
Aldi	1,254	80%	1,003	£10,982	£11.02
Little Waitrose	650	95%	618	£11,084	£6.84
<b>Sub-total</b>	<b>1,904</b>		<b>1,621</b>		<b>£17.86</b>
<b>Didcot</b>					
Great Western Park supermarket	1,544	80%	1,235	£12,000	£14.82
West of Great Western Park Local Centres	1,000	95%	950	£8,000	£7.60
<b>Sub-total</b>	<b>2,544</b>		<b>2,185</b>		<b>£22.42</b>
Grove Airfield Local Centre	800	100%	800	£8,000	£6.40
<b>Total</b>	<b>9,357</b>		<b>8,219</b>		<b>£87.71</b>
<b>Other</b>					
Land at Didcot Power Station food store	1,200	80%	960	£12,000	£11.52

Source: VOWH District Council

Table 12: Summary of Convenience Goods Expenditure 2014 to 2031

Centre	2014	2016	2021	2026	2031
<b>Available Expenditure in VOWH District (£m)</b>					
Abingdon	110.21	112.48	121.49	127.57	129.07
Wantage/Grove	61.51	62.41	60.75	63.49	63.92
Botley	12.83	12.99	14.88	15.38	15.31
Faringdon	23.94	24.55	33.87	35.88	36.62
Other VOWH	17.50	17.85	18.91	20.04	20.47
Science Vale/West of Didcot	0.00	0.00	18.65	21.59	23.96
<b>Total</b>	<b>225.98</b>	<b>230.28</b>	<b>268.56</b>	<b>283.95</b>	<b>289.35</b>
<b>Turnover Existing Facilities/Commitments (£m)</b>					
Abingdon	81.29	81.29	114.05	114.05	114.05
Wantage/Grove	44.86	44.86	51.26	51.26	51.26
Botley	13.51	13.51	14.25	14.25	14.25
Faringdon	21.00	21.00	38.86	38.86	38.86
Other VOWH	17.50	17.50	17.50	17.50	17.50
Science Vale/West of Didcot	0.00	0.00	22.42	22.42	22.42
<b>Total</b>	<b>178.14</b>	<b>178.14</b>	<b>258.33</b>	<b>258.33</b>	<b>258.33</b>
<b>Surplus/Deficit Expenditure (£m)</b>					
Abingdon	28.92	31.20	7.44	13.52	15.02
Wantage/Grove	16.65	17.56	9.50	12.24	12.67
Botley	-0.68	-0.52	0.63	1.13	1.06
Faringdon	2.94	3.55	-4.99	-2.98	-2.23
Other VOWH	0.00	0.35	1.41	2.54	2.97
Science Vale/West of Didcot	0.00	0.00	-3.77	-0.83	1.53
<b>Total</b>	<b>47.84</b>	<b>52.14</b>	<b>10.22</b>	<b>25.62</b>	<b>31.02</b>

Table 13A: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031 - Baseline

Centre	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£12,000	£12,000	£12,000	£12,000	£12,000
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	2,410	2,600	620	1,127	1,252
Wantage/Grove	1,388	1,463	791	1,020	1,056
Botley	-56	-43	53	94	88
Faringdon	245	296	-416	-249	-186
Other VOWH	n/a	30	118	212	248
Science Vale/West of Didcot	n/a	0	-314	-70	128
<b>Total</b>	<b>3,987</b>	<b>4,345</b>	<b>852</b>	<b>2,135</b>	<b>2,585</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	3,443	3,714	886	1,610	1,789
Wantage/Grove	1,982	2,090	1,130	1,457	1,508
Botley	-80	-61	75	135	126
Faringdon	350	423	-594	-355	-266
Other VOWH	n/a	42	168	303	354
Science Vale/West of Didcot	n/a	0	-449	-99	182
<b>Total</b>	<b>5,695</b>	<b>6,207</b>	<b>1,217</b>	<b>3,049</b>	<b>3,692</b>

Table 13B: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031 - Option 1

Centre	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£12,000	£12,000	£12,000	£12,000	£12,000
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	2,410	2,600	669	1,419	1,788
Wantage/Grove	1,388	1,463	793	1,029	1,073
Botley	-56	-43	54	104	105
Faringdon	245	296	-413	-231	-154
Other VOWH	n/a	30	129	277	367
Science Vale/West of Didcot	n/a	0	-312	-55	154
<b>Total</b>	<b>3,987</b>	<b>4,345</b>	<b>920</b>	<b>2,543</b>	<b>3,334</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	3,443	3,714	956	2,027	2,554
Wantage/Grove	1,982	2,090	1,133	1,470	1,533
Botley	-80	-61	77	148	150
Faringdon	350	423	-590	-330	-219
Other VOWH	n/a	42	184	396	525
Science Vale/West of Didcot	n/a	0	-445	-79	220
<b>Total</b>	<b>5,695</b>	<b>6,207</b>	<b>1,315</b>	<b>3,633</b>	<b>4,762</b>

Table 13C: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031 - Option 2

Centre	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£12,000	£12,000	£12,000	£12,000	£12,000
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	2,410	2,600	670	1,427	1,802
Wantage/Grove	1,388	1,463	797	1,051	1,114
Botley	-56	-43	54	101	101
Faringdon	245	296	-407	-196	-90
Other VOWH	n/a	30	127	266	346
Science Vale/West of Didcot	n/a	0	-315	-76	115
<b>Total</b>	<b>3,987</b>	<b>4,345</b>	<b>925</b>	<b>2,573</b>	<b>3,389</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	3,443	3,714	958	2,039	2,575
Wantage/Grove	1,982	2,090	1,138	1,502	1,591
Botley	-80	-61	77	145	144
Faringdon	350	423	-581	-280	-129
Other VOWH	n/a	42	181	380	495
Science Vale/West of Didcot	n/a	0	-450	-109	164
<b>Total</b>	<b>5,695</b>	<b>6,207</b>	<b>1,322</b>	<b>3,675</b>	<b>4,841</b>

Table 13D: Convenience Goods Floorspace Expenditure Capacity 2014 to 2031 - Option 3

Centre	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£12,000	£12,000	£12,000	£12,000	£12,000
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	2,410	2,600	666	1,400	1,752
Wantage/Grove	1,388	1,463	796	1,051	1,113
Botley	-56	-43	56	113	123
Faringdon	245	296	-407	-195	-88
Other VOWH	n/a	30	128	273	359
Science Vale/West of Didcot	n/a	0	-315	-75	117
<b>Total</b>	<b>3,987</b>	<b>4,345</b>	<b>924</b>	<b>2,566</b>	<b>3,377</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	3,443	3,714	951	2,000	2,504
Wantage/Grove	1,982	2,090	1,138	1,501	1,590
Botley	-80	-61	80	162	176
Faringdon	350	423	-581	-278	-125
Other VOWH	n/a	42	183	389	513
Science Vale/West of Didcot	n/a	0	-450	-108	167
<b>Total</b>	<b>5,695</b>	<b>6,207</b>	<b>1,320</b>	<b>3,666</b>	<b>4,824</b>

## Appendix 3 Comparison Goods Capacity

**Table 1A: Study Area Population - Baseline**

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,261	26,837	27,338
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,410	17,198	17,272
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,635	38,118	37,991
Zone 6: Faringdon	18,885	19,302	20,167	23,636	25,215	25,796
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,970	8,520	12,075
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>154,730</b>	<b>165,944</b>	<b>170,686</b>

**Table 1B: Study Area Population - Option 1**

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,261	26,837	27,338
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,870	19,958	22,332
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,635	38,118	37,991
Zone 6: Faringdon	18,885	19,302	20,167	23,636	25,215	25,796
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,970	8,520	12,075
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,190</b>	<b>168,704</b>	<b>175,746</b>

**Table 1C: Study Area Population - Option 2**

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,371	27,496	28,546
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,729	19,111	20,779
Zone 4: Botley	15,420	15,760	16,224	18,449	19,131	18,999
Zone 5: Wantage	30,463	31,135	32,106	36,666	38,306	38,336
Zone 6: Faringdon	18,885	19,302	20,167	23,698	25,591	26,486
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,908	8,144	11,385
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,190</b>	<b>168,704</b>	<b>175,746</b>

**Table 1D: Study Area Population - Option 3**

Zone	2011	2014	2016	2021	2026	2031
Zone 1: Abingdon	20,322	20,770	21,653	25,303	27,088	27,798
Zone 2: Abingdon Rural East	23,969	24,498	25,417	29,370	30,926	31,215
Zone 3: Abingdon Rural West	13,493	13,791	14,273	16,765	19,331	21,182
Zone 4: Botley	15,420	15,760	16,224	18,480	19,319	19,344
Zone 5: Wantage	30,463	31,135	32,106	36,666	38,306	38,336
Zone 6: Faringdon	18,885	19,302	20,167	23,698	25,591	26,486
Zone 7: Science Vale/West of Didcot	n/a	n/a	1,420	4,908	8,144	11,385
<b>Total</b>	<b>122,552</b>	<b>125,255</b>	<b>131,260</b>	<b>155,189</b>	<b>168,704</b>	<b>175,746</b>

Experian 2011 (Census data)  
Oxfordshire County Council's Research and Intelligence Unit for Vale of White Horse District Council  
Scenario 3: LPP1 and 2, ADCON, and large and small sites

**Table 2: Comparison Goods Expenditure per person (£)**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	2,975	3,160	3,438	3,985	4,654
Zone 2: Abingdon Rural East	3,338	3,546	3,859	4,473	5,223
Zone 3: Abingdon Rural West	3,348	3,556	3,870	4,486	5,238
Zone 4: Botley	3,795	4,031	4,386	5,084	5,938
Zone 5: Wantage	3,364	3,573	3,888	4,506	5,262
Zone 6: Faringdon	3,398	3,610	3,928	4,553	5,317
Zone 7: Science Vale/West of Didcot	0	3,559	3,873	4,490	5,243

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 2.2% 2013, 7.2% 2014, 4.6% 2015, 3.3% 2016, 1.4% 2017, 1% 2019, 3.0% p.a. 2019-23 and +3.2% after 2023.

Excludes Special Forms of Trading

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

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	61.79	68.42	86.85	106.95	127.23
Zone 2: Abingdon Rural East	81.79	90.13	113.33	138.32	163.04
Zone 3: Abingdon Rural West	46.17	50.76	63.50	77.14	90.48
Zone 4: Botley	59.81	65.40	80.92	97.27	112.81
Zone 5: Wantage	104.73	114.71	142.43	171.77	199.93
Zone 6: Faringdon	65.60	72.80	92.84	114.81	137.16
Zone 7: Science Vale/West of Didcot	0.00	5.05	19.25	38.25	63.31
<b>Total</b>	<b>419.88</b>	<b>467.26</b>	<b>599.12</b>	<b>744.52</b>	<b>893.95</b>

Source: Tables 1A and 2

**Table 3B: Total Comparison Goods Expenditure (£m) - Option 1**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	61.79	68.42	86.85	106.95	127.23
Zone 2: Abingdon Rural East	81.79	90.13	113.33	138.32	163.04
Zone 3: Abingdon Rural West	46.17	50.76	65.28	89.52	116.98
Zone 4: Botley	59.81	65.40	80.92	97.27	112.81
Zone 5: Wantage	104.73	114.71	142.43	171.77	199.93
Zone 6: Faringdon	65.60	72.80	92.84	114.81	137.16
Zone 7: Science Vale/West of Didcot	0.00	5.05	19.25	38.25	63.31
<b>Total</b>	<b>419.88</b>	<b>467.26</b>	<b>600.90</b>	<b>756.90</b>	<b>920.45</b>

Source: Tables 1B and 2

**Table 3D: Total Comparison Goods Expenditure (£m) - Option 3**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	61.79	68.42	87.00	107.95	129.37
Zone 2: Abingdon Rural East	81.79	90.13	113.33	138.32	163.04
Zone 3: Abingdon Rural West	46.17	50.76	64.88	86.71	110.96
Zone 4: Botley	59.81	65.40	81.06	98.23	114.86
Zone 5: Wantage	104.73	114.71	142.55	172.62	201.74
Zone 6: Faringdon	65.60	72.80	93.08	116.52	140.83
Zone 7: Science Vale/West of Didcot	0.00	5.05	19.01	36.56	59.69
<b>Total</b>	<b>419.88</b>	<b>467.26</b>	<b>600.90</b>	<b>756.92</b>	<b>920.48</b>

Source: Tables 1D and 2

**Table 3C: Total Comparison Goods Expenditure (£m) - Option 2**

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	61.79	68.42	87.23	109.58	132.86
Zone 2: Abingdon Rural East	81.79	90.13	113.33	138.32	163.04
Zone 3: Abingdon Rural West	46.17	50.76	64.74	85.72	108.85
Zone 4: Botley	59.81	65.40	80.92	97.27	112.81
Zone 5: Wantage	104.73	114.71	142.55	172.62	201.74
Zone 6: Faringdon	65.60	72.80	93.08	116.52	140.83
Zone 7: Science Vale/West of Didcot	0.00	5.05	19.01	36.56	59.69
<b>Total</b>	<b>419.88</b>	<b>467.26</b>	<b>600.86</b>	<b>756.60</b>	<b>919.81</b>

Source: Tables 1C and 2



Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	% Inflow
<b>VOWH District</b>								
Abingdon	50.3%	44.9%	37.7%	15.8%	14.4%	5.2%	15.3%	10.0%
Wantage/Grove	1.4%	0.5%	1.3%	0.1%	32.9%	8.6%	4.7%	10.0%
Botley	0.0%	0.0%	0.2%	3.0%	0.0%	0.0%	0.0%	5.0%
Seacourt Tower Retail Park	0.2%	0.1%	0.8%	2.7%	0.1%	0.0%	0.0%	60.0%
Faringdon	0.0%	0.0%	0.2%	0.0%	0.0%	7.0%	0.0%	10.0%
Other VOWH	0.8%	0.8%	1.2%	1.4%	0.4%	1.7%	0.5%	5.0%
Science Vale/West of Didcot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	5.0%
<b>VOWH District Total</b>	<b>52.7%</b>	<b>46.3%</b>	<b>41.4%</b>	<b>23.0%</b>	<b>47.8%</b>	<b>22.5%</b>	<b>30.5%</b>	
<b>Other</b>								
Botley Retail Park	1.9%	1.0%	4.3%	8.0%	0.8%	0.2%	0.0%	n/a
Oxford	29.6%	31.1%	27.4%	52.1%	17.4%	12.6%	13.1%	n/a
Didcot	3.6%	7.1%	3.3%	0.0%	8.1%	0.5%	29.1%	n/a
Swindon	0.5%	0.5%	5.3%	1.1%	5.2%	49.1%	1.8%	n/a
Other Outside District	11.7%	14.0%	18.3%	15.8%	20.7%	15.1%	25.5%	n/a
<b>Other Sub-Total</b>	<b>47.3%</b>	<b>53.7%</b>	<b>58.6%</b>	<b>77.0%</b>	<b>52.2%</b>	<b>77.5%</b>	<b>69.5%</b>	
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2014</b>	<b>61.79</b>	<b>81.79</b>	<b>46.17</b>	<b>59.81</b>	<b>104.73</b>	<b>65.60</b>	<b>0.00</b>		<b>419.88</b>
<b>VOWH District</b>									
Abingdon	31.08	36.72	17.41	9.45	15.08	3.41	0.00	12.57	125.72
Wantage/Grove	0.87	0.41	0.60	0.06	34.46	5.64	0.00	4.67	46.70
Botley	0.00	0.00	0.09	1.79	0.00	0.00	0.00	0.10	1.99
Seacourt Tower Retail Park	0.12	0.08	0.37	1.61	0.10	0.00	0.00	3.44	5.74
Faringdon	0.00	0.00	0.09	0.00	0.00	4.59	0.00	0.52	5.20
Other VOWH	0.49	0.65	0.55	0.84	0.42	1.12	0.00	0.21	4.29
Science Vale/West of Didcot	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>VOWH District Total</b>	<b>32.56</b>	<b>37.87</b>	<b>19.12</b>	<b>13.76</b>	<b>50.06</b>	<b>14.76</b>	<b>0.00</b>	<b>21.52</b>	<b>189.64</b>
<b>Other</b>									
Botley Retail Park	1.17	0.82	1.99	4.78	0.84	0.13	0.00	n/a	9.73
Oxford	18.29	25.44	12.65	31.16	18.22	8.27	0.00	n/a	114.03
Didcot	2.22	5.81	1.52	0.00	8.48	0.33	0.00	n/a	18.37
Swindon	0.31	0.41	2.45	0.66	5.45	32.21	0.00	n/a	41.48
Other Outside District	7.23	11.45	8.45	9.45	21.68	9.91	0.00	n/a	68.16
<b>Other Sub-Total</b>	<b>29.23</b>	<b>43.92</b>	<b>27.06</b>	<b>46.05</b>	<b>54.67</b>	<b>50.84</b>	<b>0.00</b>		<b>251.76</b>
<b>TOTAL</b>	<b>61.79</b>	<b>81.79</b>	<b>46.17</b>	<b>59.81</b>	<b>104.73</b>	<b>65.60</b>	<b>0.00</b>		<b>441.40</b>

Source: Table 3A and 4

Table 6: Comparison Goods Expenditure 2016 (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2016</b>	<b>68.42</b>	<b>90.13</b>	<b>50.76</b>	<b>65.40</b>	<b>114.71</b>	<b>72.80</b>	<b>5.05</b>		<b>467.26</b>
<b>VOWH District</b>									
Abingdon	34.41	40.47	19.14	10.33	16.52	3.79	0.77	13.94	139.36
Wantage/Grove	0.96	0.45	0.66	0.07	37.74	6.26	0.24	5.15	51.52
Botley	0.00	0.00	0.10	1.96	0.00	0.00	0.00	0.11	2.17
Seacourt Tower Retail Park	0.14	0.09	0.41	1.77	0.11	0.00	0.00	3.77	6.28
Faringdon	0.00	0.00	0.10	0.00	0.00	5.10	0.00	0.58	5.77
Other VOWH	0.55	0.72	0.61	0.92	0.46	1.24	0.03	0.24	4.75
Science Vale/West of Didcot	0.00	0.00	0.00	0.00	0.00	0.00	0.51	0.03	0.53
<b>VOWH District Total</b>	<b>36.05</b>	<b>41.73</b>	<b>21.01</b>	<b>15.04</b>	<b>54.83</b>	<b>16.38</b>	<b>1.54</b>	<b>23.78</b>	<b>209.87</b>
<b>Other</b>									
Botley Retail Park	1.30	0.90	2.18	5.23	0.92	0.15	0.00	n/a	10.68
Oxford	20.25	28.03	13.91	34.07	19.96	9.17	0.66	n/a	126.06
Didcot	2.46	6.40	1.68	0.00	9.29	0.36	1.47	n/a	21.66
Swindon	0.34	0.45	2.69	0.72	5.96	35.74	0.09	n/a	46.00
Other Outside District	8.00	12.62	9.29	10.33	23.74	10.99	1.29	n/a	76.27
<b>Other Sub-Total</b>	<b>32.36</b>	<b>48.40</b>	<b>29.74</b>	<b>50.36</b>	<b>59.88</b>	<b>56.42</b>	<b>3.51</b>		<b>280.67</b>
<b>TOTAL</b>	<b>68.42</b>	<b>90.13</b>	<b>50.76</b>	<b>65.40</b>	<b>114.71</b>	<b>72.80</b>	<b>5.05</b>		<b>490.54</b>

Source: Table 3A and 4

Table 7: Future Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	% Inflow
<b>VOWH District</b>								
Abingdon	47.3%	36.4%	33.0%	10.5%	11.4%	5.2%	10.2%	10.0%
Wantage/Grove	1.4%	0.5%	1.1%	0.1%	27.9%	8.5%	4.0%	10.0%
Botley (1)	0.0%	0.0%	1.0%	10.0%	0.0%	0.0%	0.0%	5.0%
Seacourt Tower Retail Park (2)	2.5%	1.0%	5.0%	10.0%	0.5%	0.1%	0.0%	60.0%
Faringdon	0.0%	0.0%	0.2%	0.0%	0.0%	6.9%	0.0%	10.0%
Other VOWH	0.8%	0.8%	1.2%	1.4%	0.4%	1.7%	0.5%	5.0%
Science Vale/West of Didcot	0.0%	1.0%	0.0%	0.0%	1.0%	0.0%	10.0%	5.0%
<b>VOWH District Total</b>	<b>52.0%</b>	<b>39.7%</b>	<b>41.5%</b>	<b>32.0%</b>	<b>41.2%</b>	<b>22.4%</b>	<b>24.7%</b>	
<b>Other</b>								
Botley Retail Park	1.5%	0.8%	3.3%	5.0%	0.5%	0.1%	0.0%	n/a
Oxford (3)	29.2%	28.0%	26.6%	46.6%	17.3%	12.6%	12.0%	n/a
Didcot (4)	6.1%	19.0%	6.0%	0.0%	16.0%	1.0%	45.0%	n/a
Swindon	0.5%	0.5%	5.3%	1.1%	5.2%	49.1%	1.8%	n/a
Other Outside District	10.7%	12.0%	17.3%	15.3%	19.8%	14.8%	16.5%	n/a
<b>Other Sub-Total</b>	<b>48.0%</b>	<b>60.3%</b>	<b>58.5%</b>	<b>68.0%</b>	<b>58.8%</b>	<b>77.6%</b>	<b>75.3%</b>	
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

Source: NEMS Household Survey September 2012 with NLP adjustments

(1) incl. new Botley Centre

(2) incl. Seacourt Tower RP redevelopment

(3) incl. Westgate Centre redevelopment in Oxford

(4) incl. Orchard Centre Phase II and development at Didcot Power Station

Table 8: Comparison Goods Expenditure 2021 (£m) - Baseline

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2021</b>	<b>86.85</b>	<b>113.33</b>	<b>63.50</b>	<b>80.92</b>	<b>142.43</b>	<b>92.84</b>	<b>19.25</b>		<b>599.12</b>
<b>VOWH District</b>									
Abingdon	41.08	41.25	20.96	8.50	16.24	4.83	1.96	14.98	149.79
Wantage/Grove	1.22	0.57	0.70	0.08	39.74	7.89	0.77	5.66	56.62
Botley	0.00	0.00	0.64	8.09	0.00	0.00	0.00	0.46	9.19
Seacourt Tower Retail Park	2.17	1.13	3.18	8.09	0.71	0.09	0.00	23.07	38.44
Faringdon	0.00	0.00	0.13	0.00	0.00	6.41	0.00	0.73	7.26
Other VOWH	0.69	0.91	0.76	1.13	0.57	1.58	0.10	0.30	6.04
Science Vale/West of Didcot	0.00	1.13	0.00	0.00	1.42	0.00	1.92	0.24	4.72
<b>VOWH District Total</b>	<b>45.16</b>	<b>44.99</b>	<b>26.35</b>	<b>25.90</b>	<b>58.68</b>	<b>20.80</b>	<b>4.75</b>	<b>45.43</b>	<b>272.07</b>
<b>Other</b>									
Botley Retail Park	1.30	0.91	2.10	4.05	0.71	0.09	0.00	n/a	9.16
Oxford	25.36	31.73	16.89	37.71	24.64	11.70	2.31	n/a	150.34
Didcot	5.30	21.53	3.81	0.00	22.79	0.93	8.66	n/a	63.02
Swindon	0.43	0.57	3.37	0.89	7.41	45.58	0.35	n/a	58.59
Other Outside District	9.29	13.60	10.99	12.38	28.20	13.74	3.18	n/a	91.38
<b>Other Sub-Total</b>	<b>41.69</b>	<b>68.34</b>	<b>37.15</b>	<b>55.03</b>	<b>83.75</b>	<b>72.04</b>	<b>14.50</b>	<b>n/a</b>	<b>372.49</b>
<b>TOTAL</b>	<b>86.85</b>	<b>113.33</b>	<b>63.50</b>	<b>80.92</b>	<b>142.43</b>	<b>92.84</b>	<b>19.25</b>		<b>644.55</b>

Source: Table 3A and 7

Table 9: Comparison Goods Expenditure 2026 (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2026</b>	<b>106.95</b>	<b>138.32</b>	<b>77.14</b>	<b>97.27</b>	<b>171.77</b>	<b>114.81</b>	<b>38.25</b>		<b>744.52</b>
<b>VOWH District</b>									
Abingdon	50.59	50.35	25.46	10.21	19.58	5.97	3.90	18.45	184.51
Wantage/Grove	1.50	0.69	0.85	0.10	47.92	9.76	1.53	6.93	69.28
Botley	0.00	0.00	0.77	9.73	0.00	0.00	0.00	0.55	11.05
Seacourt Tower Retail Park	2.67	1.38	3.86	9.73	0.86	0.11	0.00	27.92	46.54
Faringdon	0.00	0.00	0.15	0.00	0.00	7.92	0.00	0.90	8.97
Other VOWH	0.86	1.11	0.93	1.36	0.69	1.95	0.19	0.37	7.45
Science Vale/West of Didcot	0.00	1.38	0.00	0.00	1.72	0.00	3.83	0.36	7.29
<b>VOWH District Total</b>	<b>55.62</b>	<b>54.91</b>	<b>32.01</b>	<b>31.13</b>	<b>70.77</b>	<b>25.72</b>	<b>9.45</b>	<b>55.49</b>	<b>335.09</b>
<b>Other</b>									
Botley Retail Park	1.60	1.11	2.55	4.86	0.86	0.11	0.00	n/a	11.09
Oxford	31.23	38.73	20.52	45.33	29.72	14.47	4.59	n/a	184.58
Didcot	6.52	26.28	4.63	0.00	27.48	1.15	17.21	n/a	83.28
Swindon	0.53	0.69	4.09	1.07	8.93	56.37	0.69	n/a	72.38
Other Outside District	11.44	16.60	13.35	14.88	34.01	16.99	6.31	n/a	113.58
<b>Other Sub-Total</b>	<b>51.34</b>	<b>83.41</b>	<b>45.13</b>	<b>66.14</b>	<b>101.00</b>	<b>89.09</b>	<b>28.80</b>	<b>n/a</b>	<b>464.91</b>
<b>TOTAL</b>	<b>106.95</b>	<b>138.32</b>	<b>77.14</b>	<b>97.27</b>	<b>171.77</b>	<b>114.81</b>	<b>38.25</b>		<b>800.01</b>

Source: Table 3A and 7

Table 10: Comparison Goods Expenditure 2031 (£m)

Centre/Facility	Zone 1 Abingdon	Zone 2 Abingdon Rural East	Zone 3 Abingdon Rural West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Zone 7 Science Vale/ West of Didcot	Inflow	Total
<b>Expenditure 2031</b>	<b>127.23</b>	<b>163.04</b>	<b>90.48</b>	<b>112.81</b>	<b>199.93</b>	<b>137.16</b>	<b>63.31</b>		<b>893.95</b>
<b>VOWH District</b>									
Abingdon	60.18	59.35	29.86	11.84	22.79	7.13	6.46	21.96	219.57
Wantage/Grove	1.78	0.82	1.00	0.11	55.78	11.66	2.53	8.19	81.86
Botley	0.00	0.00	0.90	11.28	0.00	0.00	0.00	0.64	12.83
Seacourt Tower Retail Park	3.18	1.63	4.52	11.28	1.00	0.14	0.00	32.63	54.38
Faringdon	0.00	0.00	0.18	0.00	0.00	9.46	0.00	1.07	10.72
Other VOWH	1.02	1.30	1.09	1.58	0.80	2.33	0.32	0.44	8.88
Science Vale/West of Didcot	0.00	1.63	0.00	0.00	2.00	0.00	6.33	0.52	10.48
<b>VOWH District Total</b>	<b>66.16</b>	<b>64.73</b>	<b>37.55</b>	<b>36.10</b>	<b>82.37</b>	<b>30.72</b>	<b>15.64</b>	<b>65.45</b>	<b>398.72</b>
<b>Other</b>									
Botley Retail Park	1.91	1.30	2.99	5.64	1.00	0.14	0.00	n/a	12.98
Oxford	37.15	45.65	24.07	52.57	34.59	17.28	7.60	n/a	218.90
Didcot	7.76	30.98	5.43	0.00	31.99	1.37	28.49	n/a	106.02
Swindon	0.64	0.82	4.80	1.24	10.40	67.34	1.14	n/a	86.37
Other Outside District	13.61	19.56	15.65	17.26	39.59	20.30	10.45	n/a	136.42
<b>Other Sub-Total</b>	<b>61.07</b>	<b>98.31</b>	<b>52.93</b>	<b>76.71</b>	<b>117.56</b>	<b>106.43</b>	<b>47.67</b>	<b>n/a</b>	<b>560.68</b>
<b>TOTAL</b>	<b>127.23</b>	<b>163.04</b>	<b>90.48</b>	<b>112.81</b>	<b>199.93</b>	<b>137.16</b>	<b>63.31</b>		<b>959.40</b>

Source: Table 3A and 7

Table 11: Comparison Goods Commitments

Store	Comparison Goods Floorspace (sq.m gross)	Comparison Goods Floorspace (sq.m net)	Turnover Density (per sq.m net)	Turnover (2014) £Millions
<b>Abingdon</b>				
Abbey Shopping Centre SPD Food Store	n/a	1,470	£7,000	£10.29
<b>Botley</b>				
Homebase, Seacroft Centre (loss)	-4,212	-3,749	£1,500	-£5.62
Comparison shops in new centre (50% of units)	1,800	1,350	£5,000	£6.75
Botley, Seacourt Tower Retail Park (completed)	6,369	5,095	£4,000	£20.38
Botley, Seacourt Tower Retail Park Phase II	7,255	5,804	£4,000	£23.22
<b>Sub-Total</b>	<b>11,212</b>	<b>8,500</b>		<b>£44.72</b>
<b>Faringdon</b>				
Aldi/Little Waitrose (non-food)	n/a	283	£7,000	£1.98
<b>West of Didcot</b>				
Great Western Park Supermarket (non-food)	n/a	309	£7,000	£2.16
Great Western Park New Local Centres	1,000	750	£5,000	£3.75
<b>Sub-Total</b>	<b>1,000</b>	<b>1,059</b>		<b>£5.91</b>
<b>Wantage/Grove</b>				
Grove Airfield Local Centre	680	500	£5,000	£2.50
<b>Total</b>	<b>12,892</b>	<b>10,059</b>		<b>£65.41</b>
<b>Other</b>				
Land at Didcot Power Station retail warehouses	11,500	9,200	£2,500	£23.00

Source: VOWH District Council

Table 12: Summary of Comparison Goods Expenditure 2014 to 2031 - Baseline

	2014	2016	2021	2026	2031
<b>Available Expenditure in VOWH District (£m)</b>					
Abingdon	125.72	139.36	149.79	184.51	219.57
Wantage/Grove	46.70	51.52	56.62	69.28	81.86
Botley (incl. Seacourt Tower Retail Park)	7.72	8.46	47.63	57.59	67.21
Faringdon	5.20	5.77	7.26	8.97	10.72
Other VOWH	4.29	4.75	6.04	7.45	8.88
Science Vale/West of Didcot	n/a	0.53	4.72	7.29	10.48
<b>Total</b>	<b>189.64</b>	<b>210.40</b>	<b>272.07</b>	<b>335.09</b>	<b>398.72</b>
<b>Turnover of Existing Facilities (£m)</b>					
Abingdon	125.72	130.80	144.42	159.45	176.04
Wantage/Grove	46.70	48.59	53.64	59.23	65.39
Botley (incl. Seacourt Tower Retail Park)	7.72	8.03	8.87	9.79	10.81
Faringdon	5.20	5.41	5.98	6.60	7.29
Other VOWH	4.29	4.46	4.93	5.44	6.00
Science Vale/West of Didcot	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>189.64</b>	<b>197.30</b>	<b>217.83</b>	<b>240.51</b>	<b>265.54</b>
<b>Turnover of Commitments (£m)</b>					
Abingdon	10.29	10.71	11.82	13.05	14.41
Wantage/Grove	2.50	2.60	2.87	3.17	3.50
Botley (incl. Seacourt Tower Retail Park)	44.72	46.53	51.37	56.72	62.62
Faringdon	1.98	2.06	2.28	2.51	2.77
Other VOWH	0.00	0.00	0.00	0.00	0.00
Science Vale/West of Didcot	5.91	6.15	6.79	7.50	8.28
<b>Total</b>	<b>65.41</b>	<b>68.05</b>	<b>75.13</b>	<b>82.95</b>	<b>91.59</b>
<b>Surplus/Deficit Expenditure (£m)</b>					
Abingdon	n/a	-2.14	-6.44	12.02	29.12
Wantage/Grove	n/a	0.33	0.11	6.88	12.97
Botley (incl. Seacourt Tower Retail Park)	n/a	-46.11	-12.61	-8.92	-6.23
Faringdon	n/a	-1.70	-1.00	-0.14	0.65
Other VOWH	n/a	0.29	1.12	2.01	2.87
Science Vale/West of Didcot	n/a	-5.62	-2.07	-0.21	2.20
<b>Total</b>	<b>n/a</b>	<b>-54.95</b>	<b>-20.90</b>	<b>11.64</b>	<b>41.59</b>

Source: Tables 5 to 11

Table 13A: Comparison Goods Floorspace Projections 2014 to 2031 - Baseline

	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,000	£5,202	£5,743	£6,341	£7,001
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	n/a	-412	-1,122	1,895	4,159
Wantage/Grove	n/a	64	19	1,085	1,852
Botley (incl. Seacourt Tower Retail Park)	n/a	-8,864	-2,196	-1,407	-890
Faringdon	n/a	-327	-173	-22	94
Other VOWH	n/a	56	194	318	411
Science Vale/West of Didcot	n/a	-1,080	-361	-33	315
<b>Total</b>	<b>n/a</b>	<b>-10,563</b>	<b>-3,639</b>	<b>1,835</b>	<b>5,941</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	n/a	-549	-1,496	2,527	5,545
Wantage/Grove	n/a	86	25	1,446	2,470
Botley (incl. Seacourt Tower Retail Park)	n/a	-11,818	-2,928	-1,876	-1,186
Faringdon	n/a	-436	-231	-29	125
Other VOWH	n/a	74	259	423	547
Science Vale/West of Didcot	n/a	-1,440	-481	-44	420
<b>Total</b>	<b>n/a</b>	<b>-14,084</b>	<b>-4,852</b>	<b>2,447</b>	<b>7,921</b>

Table 13B: Comparison Goods Floorspace Projections 2014 to 2031 - Option 1

	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,000	£5,202	£5,743	£6,341	£7,001
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	n/a	-412	-1,008	2,611	5,547
Wantage/Grove	n/a	64	22	1,108	1,898
Botley (incl. Seacourt Tower Retail Park)	n/a	-8,864	-8,886	-8,726	-8,617
Faringdon	n/a	-327	5,295	6,146	6,804
Other VOWH	n/a	56	407	562	681
Science Vale/West of Didcot	n/a	-1,080	-127	17	133
<b>Total</b>	<b>n/a</b>	<b>-10,563</b>	<b>-4,297</b>	<b>1,719</b>	<b>6,447</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	n/a	-549	-1,344	3,482	7,396
Wantage/Grove	n/a	86	30	1,478	2,531
Botley (incl. Seacourt Tower Retail Park)	n/a	-11,818	-11,848	-11,634	-11,489
Faringdon	n/a	-436	7,060	8,194	9,071
Other VOWH	n/a	74	542	749	908
Science Vale/West of Didcot	n/a	-1,440	-169	23	178
<b>Total</b>	<b>n/a</b>	<b>-14,084</b>	<b>-5,729</b>	<b>2,291</b>	<b>8,596</b>

Table 13C: Comparison Goods Floorspace Projections 2014 to 2031 - Option 2

	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,000	£5,202	£5,743	£6,341	£7,001
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	n/a	-412	-1,008	2,611	5,548
Wantage/Grove	n/a	64	31	1,163	2,004
Botley (incl. Seacourt Tower Retail Park)	n/a	-8,864	-8,887	-8,732	-8,629
Faringdon	n/a	-327	5,288	6,099	6,713
Other VOWH	n/a	56	410	581	719
Science Vale/West of Didcot	n/a	-1,080	-127	17	133
<b>Total</b>	<b>n/a</b>	<b>-10,563</b>	<b>-4,293</b>	<b>1,739</b>	<b>6,487</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	n/a	-549	-1,344	3,482	7,397
Wantage/Grove	n/a	86	41	1,550	2,672
Botley (incl. Seacourt Tower Retail Park)	n/a	-11,818	-11,850	-11,643	-11,506
Faringdon	n/a	-436	7,050	8,132	8,951
Other VOWH	n/a	74	547	775	959
Science Vale/West of Didcot	n/a	-1,440	-169	23	178
<b>Total</b>	<b>n/a</b>	<b>-14,084</b>	<b>-5,725</b>	<b>2,319</b>	<b>8,650</b>

Table 13D: Comparison Goods Floorspace Projections 2014 to 2031 - Option 3

	2014	2016	2021	2026	2031
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,000	£5,202	£5,743	£6,341	£7,001
<b>Floorspace Requirement (sq.m net)</b>					
Abingdon	n/a	-412	-1,018	2,551	5,431
Wantage/Grove	n/a	64	31	1,161	2,000
Botley (incl. Seacourt Tower Retail Park)	n/a	-8,864	-8,885	-8,715	-8,595
Faringdon	n/a	-327	5,294	6,140	6,793
Other VOWH	n/a	56	410	581	720
Science Vale/West of Didcot	n/a	-1,080	-126	19	137
<b>Total</b>	<b>n/a</b>	<b>-10,563</b>	<b>-4,294</b>	<b>1,738</b>	<b>6,485</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Abingdon	n/a	-549	-1,357	3,402	7,241
Wantage/Grove	n/a	86	41	1,548	2,667
Botley (incl. Seacourt Tower Retail Park)	n/a	-11,818	-11,846	-11,619	-11,460
Faringdon	n/a	-436	7,059	8,187	9,057
Other VOWH	n/a	74	547	775	960
Science Vale/West of Didcot	n/a	-1,440	-168	26	183
<b>Total</b>	<b>n/a</b>	<b>-14,084</b>	<b>-5,725</b>	<b>2,318</b>	<b>8,647</b>



















Nathaniel Lichfield  
& Partners

Planning. Design. Economics.

**Planning** 2011-2014  
**Consultancy** RTPI  
**of the Year** . ★ ★ ★ .

-  Applications & Appeals
-  Climate Change & Sustainability
-  Community Engagement
-  Daylight & Sunlight
-  Economics & Regeneration
-  Environmental Assessment
-  Expert Evidence
-  GIS & Spatial Analytics
-  Graphic Design
-  Heritage
-  Property Economics
-  Site Finding & Land Assembly
-  Strategy & Appraisal
-  Urban Design

**Bristol**

0117 403 1980

**Cardiff**

029 2043 5880

**Edinburgh**

0131 285 0670

**Leeds**

0113 397 1397

**London**

020 7837 4477

**Manchester**

0161 837 6130

**Newcastle**

0191 261 5685

**Thames Valley**

0118 334 1920

**nlpplanning.com**