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Planning. Design. Economics.

**Retail and Town Centre Study**

**Vale of White Horse District Council**

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## 1.0 Introduction

### Study Objectives

- 1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by the Vale of White Horse (VOWH) District Council to prepare a District wide Retail and Town Centre Study. The Study will assess changes since the 2008 Vale of White Horse Retail Study and the Updated Assessment of Convenience Goods Capacity in Faringdon and Abingdon 2010 (updated in 2011 to inform the Abbey Shopping Centre and Charter Area Supplementary Planning Document).
- 1.2 The key objective of the Study will be to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Development Plan, taking into account changes since the previous study. The objectives of the study are to:
- 1 assess changes in circumstances and shopping patterns since the previous Study was undertaken;
  - 2 assess the future need and (residual) capacity for retail floorspace distributed by town centre for the period up to 2029;
  - 3 assess the existing supply and demand for retail and other town centre uses and the role played by each of the centres;
  - 4 audit existing commercial leisure provision and assess potential future requirements;
  - 5 review the ability of centres and development opportunity sites to accommodate needs; and
  - 6 provide advice on policies to be included in development plan documents to address future needs, and provide recommendations on how each town centre can develop its role.
- 1.3 The findings of this report will need to be monitored particularly in terms of the recovery from the recent recession. An update is likely to be required in 4-5 years.

## 2.0 The Shopping Hierarchy

### Centres in Vale of White Horse and the Surrounding Area

- 2.1 Vale of White Horse (VOWH) District is bounded by Oxford City, South Oxfordshire, West Oxfordshire, Swindon, West Berkshire, Cherwell and Cotswold local authority areas.
- 2.2 Abingdon, Botley, Faringdon, Grove and Wantage are the main shopping centres within VOWH, together with the smaller centres at Shrivenham, Watchfield, Harwell Oxford campus and Kingston Bagpuize.
- 2.3 Management Horizon Europe's UK Shopping Index 2008 ranks retail centres across the country. While this data is somewhat dated, it remains the most up to date national ranking of centres available. It should therefore be viewed in the context that the data will not take account of recent changes that may affect rankings. Management Horizon's rank for centres in VOWH and nearby centres outside the District is shown in Table 2.1 below.

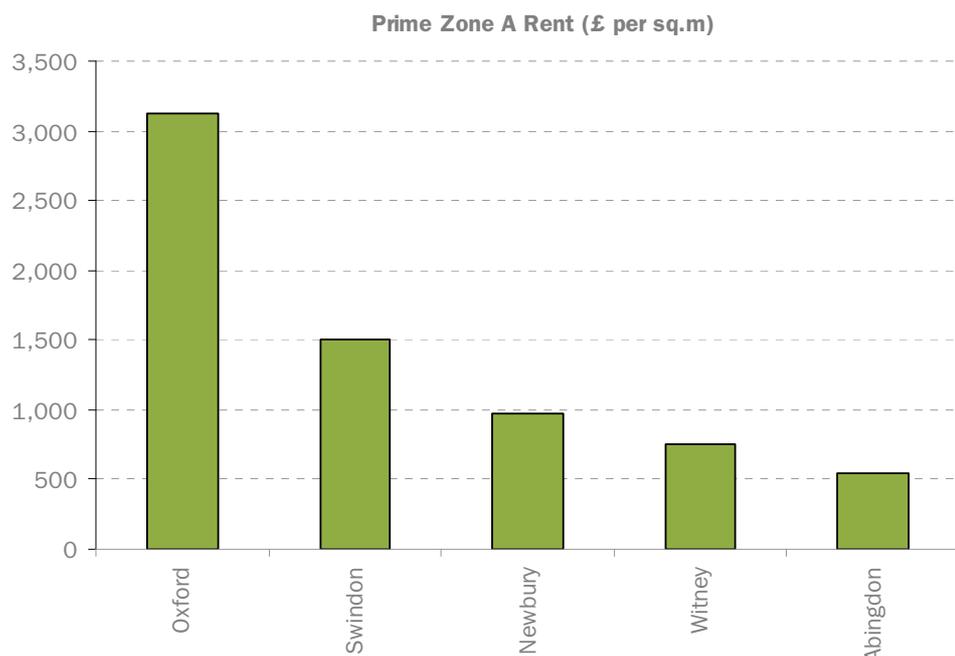
Table 2.1 Management Horizons Europe Shopping Index (2008)

Centre	Rank	MHE Score	Classification
Oxford	45	268	Major Regional
Swindon	55	253	Major Regional
Newbury	149	173	Sub-Regional
Witney	294	105	Major District
Cowley	342	94	Major District
Didcot	522	68	District
<b>Botley</b> (incl. Botley Rd Retail Park)	<b>581</b>	<b>59</b>	<b>Minor District</b>
<b>Abingdon</b>	<b>694</b>	<b>51</b>	<b>Minor District</b>
<b>Abingdon Fairacres Retail Park</b>	<b>1,247</b>	<b>29</b>	<b>Local</b>
<b>Wantage</b>	<b>1,325</b>	<b>22</b>	<b>Local</b>
<b>Caldecott, Abingdon</b>	<b>1,716</b>	<b>20</b>	<b>Local</b>
Wallingford	1,950	17	Local
<b>Faringdon</b>	<b>3,120</b>	<b>8</b>	<b>Minor Local</b>
<b>Grove</b>	<b>3,321</b>	<b>7</b>	<b>Minor Local</b>
<b>Shrivenham</b>	<b>3,870</b>	<b>5</b>	<b>Minor Local</b>
<b>Watchfield</b>	<b>4,226</b>	<b>4</b>	<b>Minor Local</b>

Source: Management Horizon Europe 2008 (**Bold** indicates centres within VOWH District)

- 2.4 The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score (10) than other multiple operators such as H&M (3) in order to reflect their major influence on non-food shopping patterns.
  
- 2.5 A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not. Towns with a higher number of independent shops may have a low MHE score in relation to their overall size because of the weight that is given to national multiple retailers and their influence on shopping patterns.
  
- 2.6 However, it should be noted that the centres within VOWH include a high proportion of independent retailers, which are not captured in MHE’s rankings, and this data should therefore be viewed in this context. The MHE index identifies Botley as the highest ranked shopping destination, but this includes facilities at Botley Road Retail Park, located in Oxford City, as well as the Westway Centre and Seacourt. Abingdon is the second highest ranked centre in the District. Oxford, Swindon and Newbury are the main centres in the sub-region. Centres within the District are generally lower order centres in the shopping hierarchy.
  
- 2.7 The relative performance and importance of town centres can be demonstrated by reviewing commercial property values for example Zone A rental levels achieved for retail property. Prime retail yields for selected centres are shown in Figure 2.1.

Figure 2.1 Retail Zone A Rents (Source: Colliers CRE (2010))



- 2.8 Abingdon is the only centre in the District where information is available from Colliers CRE on prime Zone A rent figures around (£500 per sq.m). The retail rents are much higher in larger centres outside the District, which reflects their position in the hierarchy.

## Existing Retail Provision in Vale of White Horse

- 2.9 An assessment of the existing retail provision in the main centres is provided in the centre audits included at Appendix 4. A summary of existing retail provision is provided below:

Table 2.2 Existing Retail Service Provision

Centre	Town Centre Shop Units	Convenience Goods Sales Floorspace sq.m net	Comparison Goods Sales Floorspace sq.m net
Abingdon	179	8,379	31,521 <sup>(1)</sup>
Wantage	144	4,036	8,325
Faringdon	49	1,174	1,729
Botley	40	1,637	4,490 <sup>(2)</sup>
Grove	14	582	274
<b>Total</b>	<b>426</b>	<b>15,809</b>	<b>46,339</b>

Source: Goad Plans

<sup>(1)</sup> including Fairacres Retail Park

<sup>(2)</sup> including Homebase

- 2.10 Abingdon and Wantage town centres are similar in size in terms of the number of units. The Abingdon floorspace figures include the out of centre Tesco Extra and Fairacres Retail Park. Botley and Faringdon are similar in size if the Homebase at Seacourt Towers is excluded. Grove is a small neighbourhood centre.
- 2.11 The VOWH Local Plan 2011 (adopted 2006) identifies Abingdon, Wantage and Faringdon as town centres, Botley and Grove as shopping centres and smaller local centres in the urban areas of the main towns.
- 2.12 Abingdon and Wantage town centres are clearly at the top of the retail hierarchy in the district. Although significantly smaller, Faringdon also performs a key role as a market town serving its local catchment. The presence of markets in these three town centres is important to maintain the vitality and viability of the towns and in providing a key local service. The importance of markets is recognised in “The Portas Review – an independent review into the future of our high streets” (Mary Portas, December 2011). This report states:

*“Markets are a fantastic way to bring a town to life. There’s a market for all of us. From a bustling ‘roll up, roll up’ veggie market to a thriving organic middleclass farmers’ market. What both these types of endeavours share is people coming together to buy, to sell, to meet, to share, to discover and enjoy each other’s company. It is the oldest type of commerce. But strangely, more than any other type of retailing, I believe markets can serve as fundamental traffic drivers back to our high streets.*

*From food, fashion, homemade, second hand, organic, craft, gardening and flowers, car boot fairs and recycled goods; mixing up all these types of markets will bring all types of people of every age group into the town.*

*On a market stall people can try out their ideas and get their business booming without too much upfront cost. And it’s great for our town centres too, bringing in fresh ideas and products and preserving our nation’s cultural heritage to boot.”*

2.13 We consider that it is important for the District’s three market towns to maintain, and strengthen, their role in the retail hierarchy.

2.14 Although Botley is a similar size in terms of units and floorspace to Faringdon, it does not perform as a town centre nor does it provide the range of services and other facilities that would be expected in a town centre. It functions more as a suburban district centre in the outskirts of Oxford City Centre. Grove (Millbrook Square) provides a local centre for surrounding residents with a “top up” retail offer.

2.15 Based on the above, we would suggest that the following retail hierarchy should apply:

Table 2.3 Retail Hierarchy

Hierarchy	Centre
Town Centre	Abingdon Wantage Faringdon
District Centre	Botley
Local Centre	Grove (Millbrook Square)

3.0

## Assessment of Retail Needs

### Introduction

3.1

This section assesses the quantitative and qualitative scope for new retail floorspace in the District in the period from 2012 to 2029. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 4.

3.2

The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into six zones as shown in Figure 3.1. The survey zones take into consideration the extent of the catchment areas of Abingdon, Wantage, Botley and Faringdon.

3.3

The study area has been defined following a review of the 2008 Vale of White Horse Retail Study and previous household survey results which confirmed the most appropriate area to include the primary catchment area of the District's towns and centres and identify shopping patterns for the District. There will, however, be leakage from the study area to centres outside, and conversely inflow from surrounding areas.

3.4

The methodology is summarised in Figure 3.2 and set out in more detail in Appendix 1.

Figure 3.1: Study Area

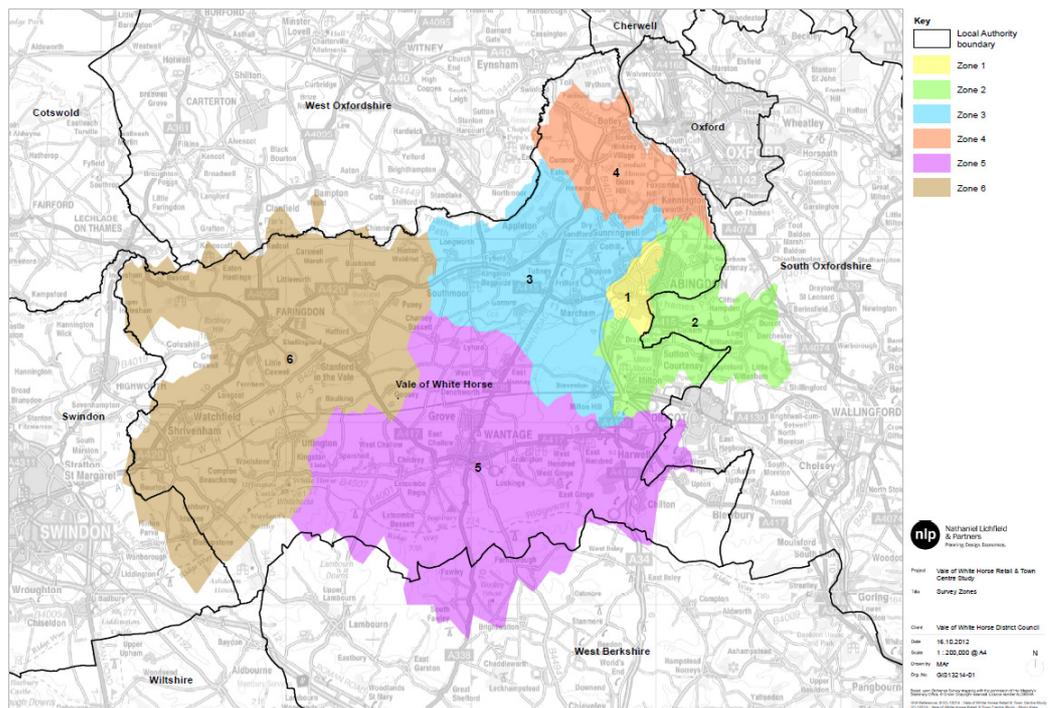
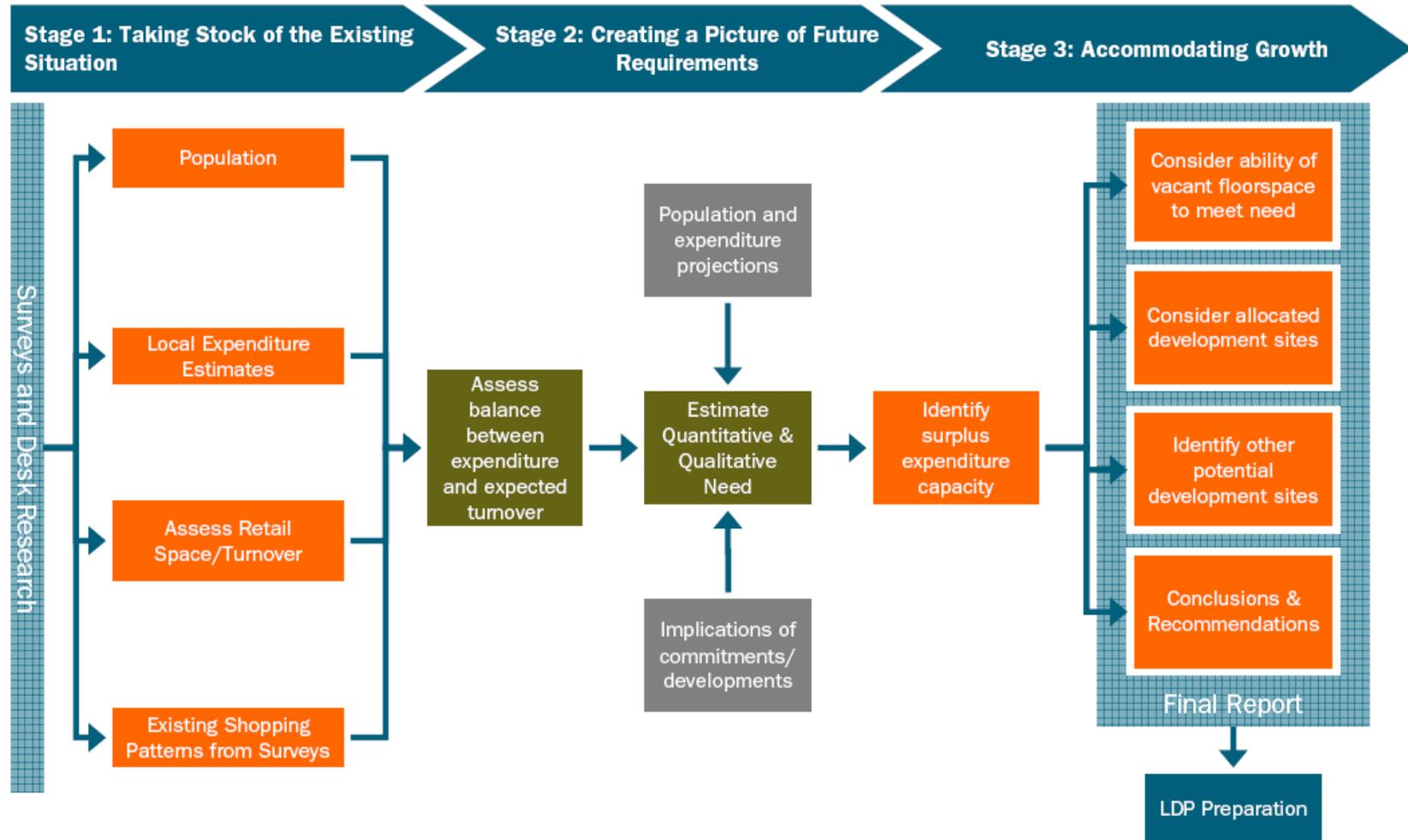


Figure 3.2: Methodology for Estimating Future Requirements for Retail Floorspace



## Retail Trends

- 3.5 It is important to consider changes in the retail sector nationally and the implications for VOWH District.
- 3.6 The economic downturn is still having a significant impact on the sector. A number of national operators have failed (e.g. Comet, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.
- 3.7 Assessing future expenditure levels within this study needs to take into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.
- 3.8 An overview of national trends within the retail sector is set out below.

### Expenditure Growth

- 3.9 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.
- 3.10 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. These national trends are anticipated to be mirrored in Oxfordshire.

### New Forms of Retailing

- 3.11 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Oxfordshire. 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 and in Oxfordshire.

- 3.12 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure.
- 3.13 The household survey results suggest 4.6% of households in VOWH do their main food and grocery shopping on the internet, and 6.0% of households do most of their non-food shopping on the internet. These figures represent a lower proportion than the internet's national share of retail expenditure (about 9%, Experian September 2012). This may be in part due to the lack of broadband in some rural areas of the District.
- 3.14 More details on internet shopping habits in the District are set out in the results of the household survey, summarised in Appendix 5. While the figures for VOWH are lower than the current national average, we expect that growth in internet sales in VOWH will increase, and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1. As VOWH includes some rural areas where access to retail facilities is limited, we would anticipate that this will further result in increased home shopping .
- 3.15 We note that the household survey undertaken to inform the 2008 VOWH Retail Study (Appendix 1) identified that just 1.5% of respondents used the internet for most of their main food shopping. A general "non-food" destination question was not asked which makes it difficult to estimate the overall proportion of non-food shopping undertaken on the internet, however the proportion of internet shopping for individual non-food categories ranged from 0.2% of DIY goods to 11.8% for audiovisual goods. This suggests that in general, internet spending has increased in VOWH since 2008.
- 3.16 Recent trends suggest continued strong growth in this sector, but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 10 states:
- "The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales.*
- The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 9% in 2012 against 4.7% in June 2008 and just 2.9% as recently as March 2007.*
- Non-store retailing continues to grow rapidly, despite the tough retail environment. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the medium term. It is estimated that 85% of the UK adult population were internet users at the end of 2011, so growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We now expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our new forecast has the SFT*

*share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."*

- 3.17 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 3.18 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 (as set out in the retail capacity methodology, Appendix 1).
- 3.19 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks & Spencer's Simply Food formats). The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade.
- 3.20 Food store operators have had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession has though first halted this trend, and is now reversing it.
- 3.21 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.
- 3.22 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres.
- 3.23 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact

on shop vacancy levels in the District. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, is particularly weak at present.

- 3.24 As an example of the effects that the economic downturn has had on VOWH, Table 3.1 below provides a comparison between the number of vacant units identified in the 2008 Retail Study and in the 2012 audit of centres undertaken as part of this Study. It should be noted that these figures may not be directly comparable as the areas covered by the survey may not be identical, however it provides a useful indication.

Table 3.1: Comparison of Vacant Units in VOWH

Centre	Vacant Units, 2008		Vacant Units, 2012		Difference
	Number	%	Number	%	
Abingdon	18	9.2%	20	11.2%	+ 2
Wantage	16	10.6%	24	16.7%	+ 8
Faringdon	2	3.0%	4	8.2%	+ 2
Grove	2	7.0%	0	0.0%	- 2
Botley	1	2.0%	3	7.5%	+ 2

Source: VOWH Retail Study, 2008 and NLP Audit

- 3.25 This shows that the number of vacant units has increased in all centres except Grove between 2008 and 2012. This is most noticeable in Wantage, where the proportion of vacant units has increased to 16.7%, which is higher than the national average (13.7%). While clearly there will be a number of reasons that could account for an increase in vacant units, the economic downturn will be a factor. Likewise, vacant units are just one of the effects of the economic downturn.
- 3.26 The continuation of these trends will influence future operator requirements in VOWH District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.
- 3.27 Operator demand for space has decreased during the recession and of those national multiples looking for space many are likely to prefer to locate in larger centres such as Oxford, Swindon and Newbury. Demand from multiples within the District's centres is likely to be weaker, which will affect the appropriate strategies for individual centres. It is noted that the District's town centres have maintained a strong independent retail sector.

## Population and Expenditure

- 3.28 The study area population for 2012 to 2029 is set out in Table 1A in Appendix 2. Population data from Experian and the 2011 Census have been adopted.

Oxfordshire County Council's small area ward based projections have been used to project population from 2011 to 2016. After 2016 Oxfordshire County Council's annual district wide growth rate has been applied. Population within the study area is expected to increase between 2012 and 2029 by 15.3% (18,941 people).

- 3.29 Table 2A in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2029. Forecasts of comparison goods spending per capita are shown in Table 2B in Appendix 3.
- 3.30 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 25% from £238.47 million in 2012 to £298.08 million in 2029, as shown in Table 3A (Appendix 2).
- 3.31 Comparison goods spending is forecast to increase by 72% between 2012 and 2029, increasing from £358.59 million in 2012 to £616.34 million in 2029, as shown in Table 3B (Appendix 3).
- 3.32 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income whereas spending on non-food goods does.
- 3.33 These figures relate to real growth and exclude inflation.

## Existing Retail Floorspace 2012

- 3.34 Existing convenience goods retail sales floorspace within VOWH District is 15,809 sq.m net, as set out in Table 4A in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores (4,702 sq.m net).
- 3.35 Comparison goods retail floorspace within VOWH District is estimated as 46,339 sq.m net, as shown in Table 10B in Appendix 3. Around 68% of this floorspace is located in Abingdon, including 43% at Fairacres Retail Park and 8% in Tesco Extra.

## Existing Spending Patterns 2012

- 3.36 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 shown in Figure 3.1 above. A summary of the methodology and results is shown in Appendix 5.

## Convenience Shopping

- 3.37 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 5A, Appendix 2.

- 3.38 Table 4A (Appendix 2) indicates that the majority of residents within all zones carry out their convenience retail shopping within the study area, ranging from 89.8% in Zone 1 (Abingdon urban area) down to 58.6% in Zone 6 (Faringdon).
- 3.39 The level of convenience goods expenditure attracted to shops/stores in VOWH in 2012 is estimated to be £205.93 million as shown in Table 6A, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares, identified in Table 5A. The market share of total convenience expenditure generated within the study area that is retained by shops/stores in VOWH (i.e. excluding any inflow to these shops/ stores from beyond the study area) is estimated to be about 78% (£185.55 million out of £238.47 million). Consequently, just 22% of available expenditure in the study area is leaking to facilities outside VOWH District (about £53 million). Over half of the leakage relates to Zone 6 (Faringdon – about £16 million) and Zone 4 (Botley – about £13 million).
- 3.40 The total benchmark turnover of the existing convenience sales floorspace within the four main towns (Abingdon, Wantage, Botley and Faringdon) in VOWH District is £167.10 million (Table 4A, Appendix 2). The actual turnover of this convenience floorspace is £188.25 million (Table 6A, Appendix 2).
- 3.41 These figures suggest that collectively convenience retail facilities in the four main towns are trading about 13% above average, with a surplus of available convenience expenditure of £21.15 million.

### Comparison Shopping

- 3.42 The estimated comparison goods expenditure currently attracted by shopping facilities within VOWH District is £162.11 million in 2012, as shown in Table 5B, Appendix 3. This includes estimates of inflow from beyond the study area. The market share of total comparison goods expenditure generated within the study area that is retained by centres/facilities in VOWH (i.e. excluding any inflow to these shops/stores from beyond the study area) is 40% (£143.84 million out of £358.59 million).
- 3.43 The lower retention levels compared to the convenience goods market shares reflects the influence of higher order centres outside VOWH District, in particular Oxford, Swindon and Newbury.
- 3.44 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (46,339 sq.m net) is £3,498 per sq.m net. The analysis of existing comparison shopping patterns in 2012 suggests the following average sales density figures for the centres in the District shown in Table 3.2.

Table 3.2: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2012 (£ per sq.m net)
Abingdon (including Retail Warehouses)	£3,127
Wantage/Grove	£4,755
Faringdon	£2,702
Botley (excluding Homebase)	£2,109
<b>District Average</b>	<b>£3,498</b>

- 3.45 The sales density figure for Abingdon reflects the significant amount of retail warehouse floorspace in the town, which generally trades at a lower density than high street shops. Faringdon and Botley have relatively low trading densities reflecting the predominance of independent traders.
- 3.46 There is 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 at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions in Abingdon and Wantage. In Botley and Faringdon the figures suggest retailers may be struggling and some future growth will be needed to secure their viability.

## Capacity for Convenience Goods Floorspace

- 3.47 Market shares have been adjusted from 2016 to take the implementation of the Tesco food store commitment in Faringdon into account (Table 4A, Appendix 2). These adjustments have increased the market share for convenience stores in Faringdon, particularly in Zone 6 where some of the expenditure currently leaking outside the District to stores in Swindon will be clawed back. There is also an adjustment to Faringdon's market share from Zones 3 and 5. Once these adjustments have been made, we have assumed that the District will maintain its market shares over the rest of the Study period.
- 3.48 It is appropriate and realistic to plan to maintain the District's market shares. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.
- 3.49 The level of available convenience goods expenditure in 2012, 2016, 2019, 2024 and 2029 is shown at Tables 6A, 8A, 9A, 10A and 11A in Appendix 2.
- 3.50 The total level of convenience goods expenditure available for shops in the District between 2012 and 2029 is summarised in Table 12A (Appendix 2). Convenience expenditure available to shopping facilities in the District is

expected to increase from £205.93 million in 2012 to £266.08 million in 2029.

- 3.51 Table 12A subtracts the benchmark turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is a deficit of £21.15 million convenience goods expenditure in 2012. In 2016, there is a deficit of £22.62 million. By 2019, future expenditure growth generates an expenditure surplus of £29.97 million, increasing to £64.63 million in 2029.
- 3.52 The surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 12A. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure, based on the average turnover of the main food supermarket operators. An average sales density of £13,000 per sq.m net has been adopted for large food stores and £5,000 per sq.m for local shops.
- 3.53 The surplus of available expenditure up to 2019 indicates that there is a short to medium term requirement for additional convenience goods floorspace in the District of 2,327 sq m net, over and above the Tesco commitment in Faringdon. Surplus expenditure at 2029 could support 5,322 sq.m net of sales floorspace (7,603 sq.m gross) in the District as a whole, as shown in Table 12A, Appendix 2.
- 3.54 The previous retail study in 2008 suggested a convenience goods projection of 3,156 sq.m net at 2027.

### Food Store Proposals

- 3.55 In addition to the proposed Tesco food store in Faringdon, there are a number of emerging food store proposals, as set out at the foot of Table 4A in Appendix 2.
- 3.56 Redevelopment proposals of the Westway Shopping Centre at Botley include the provision of a large food superstore. For the purposes of this assessment, we have assumed that this store will have a net sales area of 5,000 sq.m, of which 3,000 sq.m will comprise convenience goods floorspace. This is an indication of the size of store that may come forward, based on our understanding of the proposals, however this does not necessarily mean that this is the optimum or maximum size store that would be appropriate in this location, and the applicants will need to demonstrate the acceptability of any proposals as they come forward.
- 3.57 The Abbey Shopping Centre and The Charter Development Brief also includes a large food superstore in Abingdon. Again, we have made an assumption based on the potential size of this store, for the purposes of this assessment, that it will have a net sales area of 4,000 sq.m, of which 2,600 sq.m will comprise convenience goods floorspace.

- 3.58 A new local centre is also proposed at Grove Airfield. The local centre proposes a total of 3,400 sq.m gross, and we have assumed that a third of this floorspace will be convenience goods floorspace, which equates to 800 sq.m net.
- 3.59 If these developments are implemented, they will alter shopping patterns and the floorspace capacity projections. Convenience goods market shares have been adjusted in Table 13A in Appendix 2 assuming all these proposals are implemented by 2019. In summary, the key adjustments made to the market shares are:
- increase the inflow from outside the District to Botley from 20% to 40%;
  - increase the market share of Botley within Zone 4 from 27% to 40% - this will partly be through clawing back expenditure currently going to stores outside the District, in particular stores in Oxford, and partly through retaining spending in Zone 4 that is currently directed to stores in Abingdon;
  - there has been less adjustment made to the market shares for Abingdon as it is expected that the adjustment will be mainly internal within Abingdon, ie. from the existing Tesco and Waitrose stores.
- 3.60 The revised capacity figures are shown in Table 14A in Appendix 2.
- 3.61 In taking these proposals into account, the floorspace projection for 2019 reduces from 2,327 sq.m net (Table 12A) to -1,259 sq m net (Table 14A). The projection at 2029 reduces from 5,322 sq.m net (Table 12A) to 1,931 sq.m net (Table 14A). Most of the remaining capacity relates to Wantage/Grove (1,547 sq m net at 2029, Table 14A).

## Quantitative Capacity for Comparison Goods Floorspace

- 3.62 The household survey suggests that the District's retention of comparison goods expenditure is much lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Oxford, Swindon, Didcot, Witney and Newbury.
- 3.63 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure. Indeed, retail development will be necessary in VOWH District in order to maintain existing market share in the future. An appropriate strategy for VOWH District should be to seek to maintain existing 2012 market shares for the town centres in the face of increasing future competition, whilst maintaining the vitality and viability of centres. This will require some new development and improvements to existing shops.
- 3.64 The retail capacity projections in this report assume centres within VOWH District can maintain their market share of comparison expenditure in the

future. We consider that it is realistic and appropriate to plan to maintain market shares. The centres within VOWH should be capable of maintaining their existing comparison market share despite retail development in higher order centres, such as planned improvements in Oxford. While development in Oxford would increase its attractiveness, this is likely to be at the expense of other higher order centres. The VOWH centres should plan to maintain their existing role, which is complementary to the higher order centres.

- 3.65 Available comparison goods expenditure has been projected forward to 2016, 2019, 2024 and 2029 based on 2012 penetration rates (i.e. assuming that comparison retail facilities will maintain their current market share) in Tables 5B, 6B, 7B, 8B and 9B in Appendix 3, and summarised in Table 11B. Available comparison expenditure to facilities within the District is expected to increase from £162.11 million in 2012 to £278.7 million in 2029.
- 3.66 Future available expenditure is compared with the projected turnover of existing comparison retail is shown in Table 11B (Appendix 3). Table 11B assumes that the benchmark turnover of comparison floorspace will increase in real terms. A growth rate of 1.8% per annum is adopted, and this growth is required to maintain the health and viability of town centres. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.
- 3.67 Within the District there will be a small expenditure surplus of £6.56 million, with most of the growth in expenditure absorbed by home shopping and growth in turnover efficiency for existing floorspace. By 2019, future expenditure growth generates an expenditure surplus of £14.09 million, increasing to £33.21 million in 2024 and £59.15 million in 2029.
- 3.68 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at the foot of Table 11B in Appendix 3, using an average sales density of £5,000 per sq.m in 2012. The surplus expenditure at 2019 could support 2,818 sq.m net of sales floorspace (3,757 sq.m gross), or 6,642 sq.m net (8,855 sq.m gross) by 2024. The projection to 2029 is 11,829 sq.m net (15,773 sq.m gross), which represents a 25% increase in floorspace over the plan period.
- 3.69 The previous retail study in 2008 suggested a comparison goods projection of 28,288 sq.m net at 2027. The revised figure for 2029 is significantly lower because of the effects of the recession on expenditure growth between 2008 and 2012 and lower future growth forecasts (i.e. 2.9% growth per annum rather than 4.8% growth).

## Commitments and Proposals

- 3.70 The Tesco food store commitment in Faringdon will include a small element of comparison sales (144 sq.m net). The new retail space under-construction within the Abbey Centre is estimated to provide 1,350 sq.m net. Together

these commitments will reduce the 2029 comparison goods projection for the District as a whole to 10,335 sq.m net (13,780 sq.m gross).

- 3.71 In addition to these commitments, redevelopment proposals of the Westway Shopping Centre at Botley are likely to include a net increase in comparison sales floorspace, taking into account comparison sales within the proposed superstore (approximately 2,000 sq.m net). This figure exceeds the Botley capacity projection of 444 sq.m net at 2029, based on constant market shares. However, as a relatively high proportion of comparison goods spending within Zone 4 is currently attracted to Abingdon, we would expect that the improvements to the comparison offer of Botley would adjust these patterns to retain more spending in Botley. The proposals would also reduce the level of expenditure leaking to Oxford City from Zone 4.
- 3.72 The food superstore proposed within The Abbey Shopping Centre and The Charter Development Brief could provide around 1,400 sq.m net of comparison goods sales (35% of total sales floorspace). This would further reduce the Abingdon projection.
- 3.73 The proposed new local centre at Grove Airfield would absorb the other VOWH projection (254 sq.m net by 2029).

## Qualitative Need for Retail Floorspace

### Convenience Goods Shopping

- 3.74 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 80% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as stores of around 2,500 sq.m net or more, are the usual destination for these types of shopping trip.
- 3.75 There are three food stores of around 2,500 sq.m net or more within the District, i.e. Tesco Extra and Waitrose in Abingdon and Sainsbury's in Wantage. In addition to these superstores, there are three large supermarkets (over 1,000 sq.m net) within the District, i.e. Waitrose in Wantage, which was recently extended into a neighbouring premises; Co-op in Botley and Budgens in Faringdon. A further large Tesco supermarket has planning permission in Faringdon. The household survey indicates that these large food stores are the dominant shopping destinations used by residents in the District for main/bulk food shopping.
- 3.76 The larger food stores are supported by a good range of smaller supermarkets and convenience stores, including Tesco Express stores, Co-op and Budgens stores. The discount food sector is not represented in the District i.e. Lidl or Aldi. Food stores within the District are supported by small independent convenience shops located within the main and local centres.

- 3.77 The results of the household survey suggest that stores within Abingdon, Wantage/Grove and Faringdon are currently trading above company average or benchmark turnover, while stores in Botley are trading below company average.
- 3.78 The retail capacity projections set out in Table 12A in Appendix 2 suggest future surplus convenience goods expenditure relates primarily to Abingdon (£29.43 million in 2029) and Wantage (£26.65 million). The Tesco commitment will absorb growth in Faringdon for the foreseeable future.
- 3.79 Based on existing market shares there appears to be limited scope for food store development in the Botley area. However the household survey results indicate convenience goods expenditure retention in the Botley zone is relatively low (27%), with a significant amount of leakage to Oxford (38%) and Abingdon (25%). Food store provision in Botley caters primarily for top up rather than main/bulk food shopping. There should be potential for Botley to increase its market share of main food shopping trips in its local catchment. This will reduce the amount of expenditure leaking from Botley in Zone 4 to Abingdon and to Oxford City. The result is that this clawback will reduce capacity in Abingdon.

### High Street Comparison Shopping

- 3.80 Abingdon and Wantage are the main high street comparison shopping destinations and the highest ranking centres within the District. Botley, Faringdon and Grove have limited comparison shopping roles. VOWH centres are ranked significantly below other larger centres surrounding the District, in particular Oxford, Swindon and Didcot. These centres are accessible to residents within the District and have a much more extensive range of multiple retailers.
- 3.81 The centre audits in Appendix 4 identify that both Abingdon and Wantage have a lower than average proportion of comparison retail units compared with the national average. Both Abingdon and Wantage have a reasonable range of comparison shops including a selection of national multiples, however the choice of shops within each category of non-food shops is poor. Botley, Faringdon and Grove have a small selection of comparison operators, and most are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, charity shops and other day to day items. We note that Faringdon also includes a number of high quality and specialist independent shops.

### Bulky Goods Retail Warehouses

- 3.82 The main retail warehouse representation is at Fairacres Retail Park in Abingdon and Kings Park in Wantage, with representation from a number of major national multiple retailers that are usually found in retail warehouse parks, including Homebase, Argos, Carpetright, Furniture Village, B&Q and Tops Tiles.

- 3.83 Residents in Abingdon have good access to retail warehouses in Oxford and in Didcot. Botley includes a Homebase at Seacourt Centre and is close to Botley Road Retail Park in Oxford.
- 3.84 Wantage has good access to retail warehouses in Abingdon and Didcot. Faringdon has access to retail parks in Swindon and Abingdon.
- 3.85 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for flexibility, and that the development would not harm designated centres.

## 4.0 Strategy for Accommodating Growth

### Floorspace Projections

4.1 The floorspace projections set out in the previous sections assume that new shopping facilities within VOWH District can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of Internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in VOWH District;
- the likelihood that VOWH's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

4.2 Projections up to 2019 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2024 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

4.3 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

4.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for

new retail development within VOWH District. This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

- 4.5 Using the existing market shares, the projections up to 2019 suggest there is scope for some limited additional convenience goods floorspace in the District as a whole, with most capacity in Abingdon and Wantage/Grove. There is also limited requirement for comparison goods floorspace in the District as a whole by 2019, again focused in Abingdon and Wantage.
- 4.6 The projections over the plan period up to 2029 suggest there is a requirement over and above commitments for 7,603 sq m gross of convenience goods floorspace and 13,780 sq m gross of comparison goods floorspace.
- 4.7 These projections relate to Class A1 retail uses only. There may be scope for a further 20% floorspace that can be occupied by Class A2 to A5 uses and Class A1 non-retail services, i.e. around 4,300 sq.m gross by 2029. On this basis the overall projection (Class A1 to A5) for 2029 would be around 25,700 sq.m gross by 2029.

Table 4.1: Summary of Floorspace Requirements, 2029 (sq.m gross)

Centre	A1 Conv	A1 Comp	A2-A5	Total
Abingdon	3,234	7,467	2,140	12,841
Wantage/Grove	2,928	5,132	1,612	9,672
Botley	107	592	140	839
Faringdon	520	252	154	926
Other VOWH	814	338	230	1,382
<b>District Total</b>	<b>7,603</b>	<b>13,781</b>	<b>4,276</b>	<b>25,660</b>

Source: Tables 12A, Appendix 2 and 11B, Appendix 3

Notes: Includes existing commitments at Tesco, Faringdon and Abbey Centre, Abingdon, but not proposals at Botley, Abingdon or Grove Airfield

## Accommodating Future Growth

- 4.8 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development.
- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
  - Is the nature and scale of development likely to serve a wide catchment area?
  - Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
  - If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

- 4.9 All development should be appropriate in terms of scale and nature to the centre in which it is located.
- 4.10 The existing stock of premises will have a role to play in accommodating projected growth, after the recession. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 1.8% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 4.11 There are 51 vacant shop units within the four centres of Abingdon, Wantage, Botley and Faringdon, which equates to an overall vacancy rate of 12.3%, which is just below the Goad national average (13.7% June 2012). The vacancy rate is significantly higher in Wantage at 16.7%. The vacancy rate is relatively low in Faringdon and Botley. The total amount of vacant floorspace is approximately 6,770 sq.m gross.
- 4.12 Vacant premises should help to accommodate future growth in Abingdon and Wantage. As a target the current vacancy level in these two town centres could fall to 10%. If this was achieved then the number of reoccupied units would be two units in Abingdon and ten units in Wantage, which could accommodate about 1,700 sq.m gross of Class A1 to A5 floorspace. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:
- **Wantage:** 1,450 sq.m gross (1,100 sq.m net)
  - **Abingdon:** 250 sq.m gross (200 sq.m net)
- 4.13 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2029 would reduce only marginally from 25,700 sq.m gross to 24,000 sq.m gross.
- 4.14 However, it is noted that the existing vacant units are generally small and may not be attractive to retailers seeking modern units. It may therefore be more likely that the vacant units would be reoccupied for non A1 retail uses, and we consider that the Council should take a flexible approach to application for the change of use of vacant retail units where this could improve activity and investment in the town centres.
- 4.15 At Fairacres Retail Park, unit A3 is vacant (previously occupied by Home Store and More). This unit is 2,081 sq m gross (at least 1,600 sq m net) and if reoccupied would accommodate about 40% of the residual comparison goods floorspace projection for Abingdon (up to 2029). However, as this unit is out of centre, we have not included it in the assessment further as a means to accommodate floorspace requirements.

## Proposals

- 4.16 Emerging development proposals could, if permitted, absorb further growth.
- 4.17 Redevelopment proposals at Botley would absorb all retail capacity relating to Botley and also reduce food store capacity in Abingdon. The Abbey Shopping

Centre Development Brief proposals, including a large food store, would absorb food store capacity in Abingdon and reduce the comparison floorspace projection to 4,200 sq m net (5,600 sq m gross). The proposed new local centre at Grove will also absorb capacity.

## Accommodating Growth Summary

- 4.18 A summary of the convenience goods projections with and without proposals is shown in Table 4.2. Commitments do not absorb all capacity, but with proposals could absorb all capacity in Abingdon over the plan period, and there would be limited capacity in Botley and Faringdon. If commitments and proposals are implemented then there may still be additional scope for a further large food store in the Wantage/Grove area during the latter part of the plan period i.e. 2024 to 2029.

Table 4.2: Convenience Goods Retail Floorspace Projections 2029

Location	2029 Projection with Commitments	2029 Projection with Commitments and Proposals
	sq.m net	sq.m net
Abingdon	2,264	0
Wantage/Grove	2,050	1,547
Botley *	75	172
Faringdon	364	298
Other VOWH	570	513
<b>Total</b>	<b>5,322</b>	<b>2,530</b>

\* market share increases with redevelopment.

- 4.19 Within larger villages where additional residential development is envisaged i.e. Shrivenham, Watchfield, Harwell Oxford campus and Kingston Bagpuize, there should be scope to improve local shopping provision including small convenience stores (100 to 200 sq m net).
- 4.20 A summary of the comparison goods projections with and without commitments and proposals is shown in Table 4.3. Commitments, proposals and vacant premise do not absorb all capacity over the plan period. If commitments and proposals are implemented then there may still be additional scope for a further comparison development in Abingdon (4,000 sq.m net) and Wantage (2,249 sq.m net).

Table 4.3: Comparison Goods Retail Floorspace Projections 2029

Centre	2029 Projection without Commitments	2029 Projection with Commitments	Proposals	Re- occupied Vacant Units	Residual Requirement
	sq.m net	sq.m net		sq.m net	
Abingdon	6,950	5,600	1,400	200	4,000
Wantage/Grove	3,849	3,849	500	1,100	2,249
Botley	444	444	2,000	0	0
Faringdon	333	189	0	0	189
Other VOWH	254	254	0	0	254
<b>Total</b>	<b>11,829</b>	<b>10,336</b>	<b>3,900</b>	<b>1,300</b>	<b>6,938</b>

- 4.21 Comparison commitments, proposals and re-occupied vacant units in Abingdon (2,950 sq.m net), could be sufficient to accommodate projected capacity up to and beyond 2019. An additional 4,000 sq m net could be required between 2019 and 2029.
- 4.22 Proposals and re-occupied vacant units in Wantage/Grove (1,600 sq.m net), could be sufficient to accommodate projected capacity up to and beyond 2019. An additional 2,249 sq m net could be required between 2019 and 2029.

## Development Opportunities

### Abingdon Town Centre

- 4.23 As indicated above, the provision of a large food store within the Abbey Shopping Centre redevelopment (up to 2,600 sq m net of convenience goods sales) should accommodate growth up to 2029.
- 4.24 The first phase of the refurbishment of the Abbey Centre has been taken into account in terms of the committed retail space under-construction and the reoccupation of vacant units currently under-going refurbishment. The proposed food store in the next phase is expected to include about 1,400 sq m net of comparison sales floorspace. Taking these into account the residual comparison goods floorspace projection up to 2029 is 4,000 sq m net. The second phase proposals at the Abbey Centre may accommodate some of this additional capacity, depending on the net increase in floorspace, over and above that currently available on site. Options for maximising the increase in retail floorspace should be considered.
- 4.25 Elsewhere within Abingdon town centre development options appear to be limited, unless windfall opportunities become available e.g. the BT telephone exchange or council offices. The town centre is constrained by residential areas and public parks and there are limited opportunities to extend the centre boundary. The future focus for the primary shopping area is likely to be small scale intensification and extensions.

- 4.26 In terms of edge of centre, i.e. sites within 300 metres of the primary shopping area, the land currently occupied by the Royal Mail delivery offices and F Knight & Son builder's merchants could provide a long term development opportunity of around 0.6 hectares, if the site became available. This site could accommodate about 2,500 sq m gross (2,000 sq.m net) of large format retailing with surface car parking.

### **Wantage Town Centre**

- 4.27 As indicated above, the convenience goods floorspace projection is about 1,600 sq.m net. Taking into account commitments, proposals and the reoccupation of vacant shop units the residual comparison goods floorspace for Wantage at 2029 is 2,229 sq.m net.
- 4.28 The former Police Station and Magistrates Court is for sale and occupies a site of 0.28 hectares, and will be vacated by March 2013. The site is within a relatively secondary shopping street (Church Street) but has reasonable links to the Market Place via Victoria Cross Gallery. The site could be redevelopment for a mix of uses including Class A1 to A5 (up to 1,000 sq.m gross, 750 sq.m net) on the Church Street frontage.
- 4.29 Land to the west of Limborough Road could be assembled to create a development site of about 0.5 hectares. The site is occupied by a vacant industrial building, a council car park, a cleared and vacant plot and a small industrial unit occupied by Bushbuy. This area provides an opportunity to extend the Kings Park retail development. It could accommodate at least 2,000 sq m gross (1,700 sq.m net) of large format retailing.

### **Botley**

- 4.30 Redevelopment proposals for the Westway Shopping Centre if permitted and implemented are likely to accommodate growth in Botley up to 2029. The reoccupation of vacant units or redevelopment of the Seacourt Tower could also accommodate further growth.

### **Faringdon Town Centre**

- 4.31 As indicated above, the implementation of the Tesco will leave limited residual capacity for further comparison or convenience goods floorspace up to 2029. Within Faringdon town centre development options appear to be limited, unless the Budgens food store and car park site are redeveloped. The future focus is likely to be small scale intensification and extensions.

5.0

## Commercial Leisure Assessment

### Introduction

5.1 This section assesses the potential for commercial leisure uses in VOWH District, including cinema/multiplex, tenpin bowling, bingo, nightclubs, private health and fitness clubs, restaurants and cafés, pubs and bars.

### Cinemas

5.2 There are currently no cinemas located within the District. In total, 55% of respondents to the household survey stated that they visit the cinema, and of these 46% visited cinemas in Oxford, 37% visited the cinema in Didcot and 10% visited cinemas in Swindon.

5.3 To assess potential demand for cinema admissions within the study area, we have assumed that if a cinema were to be developed within the District, it could potentially attract 40% of cinema trips in the future. This estimate is considered to be a reasonable assumption if a cinema is provided within the district, as it will claw back some of those visiting cinemas elsewhere, but 60% of cinemagoers will continue to visit cinemas outside of the District, based on their likely preferences and habits. The catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat). The results are shown in Table 5.1 below.

Table 5.1 Cinema Potential in VOWH

	2012	2016	2019	2024	2029
Study Area Population	123,964	129,396	133,062	138,271	142,905
Population who visit the cinema (55%)	68,180	71,168	73,184	76,049	78,598
Market Retention	40%	40%	40%	40%	40%
Catchment potential	27,272	28,467	29,274	30,420	31,439
<b>Cinema Screen Potential</b>	1.7	1.7	1.8	1.9	1.9
<b>Cinema Seat Potential</b>	350	365	375	390	403

5.4 The analysis above suggests that there could be a requirement for two screens and around 400 seats, to meet future cinema demand in the District. However, given the proximity and availability of cinemas in the nearby centres of Oxford, Didcot and Swindon, this may mean that a small cinema within the District would not be a commercially viable option. It should be noted that this is a very high level assessment, and a more detailed commercial viability assessment would need to be undertaken by developers to demonstrate whether a cinema would be viable within the District.

- 5.5 We understand that the proposals for Westway, Botley may include a 4-6 screen cinema. Based on the above analysis, this suggests that a 4-6 screen cinema would represent an oversupply of cinema screens to serve the VOWH population. However, the full catchment of a cinema in Botley is likely to extend beyond the VOWH. A cinema would be desirable within the District if the developers can demonstrate that it would be appropriate to locate within Botley.

## Theatres

- 5.6 The household survey indicated that 55% respondents in the study area visit theatres. Theatres within Oxford were the most popular destinations, attracting 68% of respondents. London attracted 16% of respondents. Within the District, the Unicorn Theatre in Abingdon was the last destination visited by 1% of respondents.
- 5.7 The close proximity of VOWH to Oxford has an impact on the likely demand for theatre facilities in VOWH. The cultural reputation that Oxford has allows the city to attract national performances and therefore generally meets VOWH's needs. The relatively short journey to London will also help meet the district's need for high profile, national performances. There is not considered to be a need for additional theatres in the District, however if proposals are brought forward, they should be supported as they would enhance the overall offer of VOWH.

## Health and Fitness Clubs

- 5.8 As set out in the VOWH Leisure and Sports Facilities Strategy (2012), the following health and fitness clubs are located in VOWH District which have some degree of community access:

Table 5.2 Health and Fitness Provision in VOWH

Site Name	Number of Stations	Ownership Type	Access Type
Azure at Milton Hill House	5	Commercial	Registered Membership use
Carswell Golf and Country Club	10	Commercial	Registered Membership use
Faringdon Leisure Centre	35	Community school	Pay and Play
Feelgood Fitness (Abingdon)	48	Commercial	Pay and Play
K.A Fitness Ltd	31	Commercial	Pay and Play
Park Club	120	Commercial	Registered Membership use
Radley College Sports Centre	35	Other Independent School	Registered Membership use
Results Health Club (Abingdon)	49	Commercial	Registered Membership use

Site Name	Number of Stations	Ownership Type	Access Type
Southern Bypass Ground	20	Sports Club	Sports Club / Community Association
TFC Health And Fitness	90	Commercial	Registered Membership use
Wantage Leisure Centre	33	Foundation School	Pay and Play
Westminster Sports Centre	60	Higher Education Institutions	Registered Membership use
White Horse Leisure & Tennis Centre	54	Local Authority	Pay and Play

- 5.9 In total, VOWH District has at least 13 public and private health clubs. The household survey indicates that 33% of respondents or their families visit a health/fitness club. Of these, 76% did so at destinations within the District.
- 5.10 Approximately 80% of the population of the Vale of White Horse is adult (aged 16 and over), which would equate to approximately 99,200 of the study area population in 2012. This could generate demand for about 11,900 public and private membership places, based on the national average membership rate (12%). If 76% of these membership places are retained in the District then the 13 identified health and fitness clubs attract 9,050, which implies an average of around 696 members per club, which is around 50% of the national average for private fitness clubs (1,375 members). However, as only seven of these clubs have memberships, it is more appropriate to assess the average membership based only on these clubs, which equates to 1,293 members per club, just under the national average.
- 5.11 The adult population within the VOWH study area is expected to increase by about 15,100 between 2012 and 2029, which would generate around 1,800 new health club members, of which 1,370 (76%) would be retained in the District. This suggests that there is a requirement to provide an additional health and fitness club in the study area to meet this demand.

## Tenpin Bowling

- 5.12 There are no tenpin bowling centres in VOWH District. Nearby bowling facilities include Bowlplex at Ozone Leisure Park, Oxford, Reading Bowl, AMF High Wycombe, Lakeside Superbowl in Newbury and Tenpin. Swindon.
- 5.13 The household survey results suggest that about 24% of households in the study area visit tenpin bowling facilities, and of those who visit bowling facilities mainly go to the Oxford Bowlplex (77%), followed by Tenpin, Swindon (12%) and Lakeside Superbowl, Newbury (6%). The study area population (around 124,000 in 2012) as a whole could theoretically support 10 lanes, based on the national average one lane per 12,000 people.

- 5.14 Based on the lack of provision of tenpin bowling facilities within VOWH, there may be potential for a tenpin bowling facility within the district, however given the proximity of facilities in nearby, higher order centres, which are generally combined with other leisure attractions, it may not be viable for a facility within VOWH to compete with these other attractions.

## Bingo

- 5.15 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (ie. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: BISL).
- 5.16 The household survey results indicated that only 4.8% of households in the study area visit bingo facilities, of which 32% visited the New Coronet Bingo Club in Didcot, 24% visited Gala Bingo at the Ozone Leisure Park, Oxford and 21% visited Gala Bingo in Swindon.
- 5.17 There are currently no bingo facilities within the VOWH. The VOWH study area population (about 99,200 adults, 2012) could generate about 173,600 admissions based on the national participation rate (1.75 per adult). Based on national average figures (113,000 admissions per club), the VOWH study area could support one or two bingo facilities. However, the existing bingo provision around VOWH and the relatively low participation rates suggests there is limited demand for additional facilities, and we do not consider that there is a need to plan for the provision of new bingo facilities.

## Bars and Restaurants

- 5.18 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 5.3.

Table 5.3 GB Goad Plan Town Centres use Class Mix

Type of Unit	% Change 2000 to 2012	Proportion of Total Number of Units (%)			
		2000	2005	2009	2012
Class A1 (Retail)	- 15.4	59.1	56.4	54.0	50.0
Class A1 (Services)	+ 31.7	8.2	9.6	9.8	10.8
Class A2	- 4.5	8.9	8.9	9.0	8.5

Class A3/A5*	+ 41.1	11.2	13.7	14.5	15.8
Miscellaneous	- 14.3	1.4	1.4	1.3	1.2
Vacant/under Const.	+ 22.3	11.2	10.1	11.4	13.7
<b>Total</b>	<b>-</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Experian Goad Centre Reports

\*excludes Bars/Public houses (A4)

- 5.19 Whilst the proportion of Class A1 retail uses in Goad town centres has decreased by 15% between 2000 to 2012 (9.1 percentage points), Class A3/A5 uses have increased. Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the District is shown in Table 5.4.

Table 5.4 VOWH Town Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)				
	Abingdon	Wantage	Faringdon	Botley	Grove
Class A1 (Retail)	43.6	46.5	44.9	42.5	64.3
Class A1 (Services)	12.3	13.9	18.4	20.0	14.3
Class A2	16.7	12.5	12.2	17.5	7.1
Class A3-A5	16.2	10.4	16.3	12.5	14.3
Vacant/ under const.	11.2	16.7	8.2	7.5	0.0
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: VOWH Town Centre Surveys 2012

- 5.20 The proportions of Class A3/A5 within Abingdon and Faringdon is marginally higher than the national average, while this figure is lower in Wantage, Botley and Grove.
- 5.21 The retail floorspace projections in Section 4 relate to Class A1 retail uses. Based on the typical composition of centres, it is reasonable to assume there will be scope for a further 20% floorspace that could be occupied by Class A3 to A5 uses.
- 5.22 The Class A1 retail floorspace projection up to 2029 over and above commitments is around 21,500 sq m gross. If a further 20% is allocated to Class A3 to A5 uses then around 4,300 sq m gross of A3-A5 floorspace could be required.
- 5.23 Given the relatively low proportion of Class A3/A5 uses in Wantage and Botley in particular, it may be appropriate to encourage additional floorspace within these centres to be used for such uses, and adopt a more flexible approach towards uses that will complement the retail offer of the town centres.

## Conclusions

5.24 The assessment of commercial leisure uses in VOWH considers the existing provision and whether there are any deficiencies in provision that need to be addressed. The assessment considers provision within VOWH against national standards, where available.

5.25 The commercial leisure assessment concludes:

- as there are currently no cinema facilities within the District, a cinema would be desirable to meet the needs of local residents, however given the proximity of facilities outside the District, this may not be viable;
- there is not considered to be a need for additional theatres in the District, however if proposals are brought forward, they should be supported as they would enhance the overall offer of VOWH.
- there is a requirement to provide an additional health and fitness club in the study area to meet the demand from existing residents;
- there may be potential for a tenpin bowling facility within the District, however given the proximity of facilities in nearby, higher order centres, which are generally combined with other leisure attractions, it may not be viable for a facility within VOWH to compete with these other attractions;
- although there are currently no bingo facilities within the VOWH, the existing bingo provision around VOWH and the relatively low participation rates suggests there is limited demand for additional facilities, and we do not consider that there is a need to plan for the provision of new bingo facilities.
- the proportion of Class A3/A5 uses is higher in Abingdon and Faringdon than the national average, and lower in Wantage, Botley and Grove. It is important to maintain a reasonable proportion of these uses in all centres. For Wantage and Botley in particular, we consider that additional non-retail uses should be provided, in order to complement the retail focus of the centres.

6.0

## Conclusions and Recommendations

### Introduction

6.1 This report provides an update of the District wide needs assessment for retail and leisure development in the Vale of White Horse District. The principal conclusions of the analysis contained within this study are summarised below.

### Meeting Shopping Needs in VOWH

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2029.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 Long term forecasts up to and beyond 2024 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should also be monitored along with the effect proposals may have on the demand for additional development in VOWH.

### Retail Floorspace Projections

6.5 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within VOWH. The projections suggest new floorspace (over and above commitments) should be distributed as follows:

Table 6.1: Convenience Goods Retail Floorspace Projections

Location	Existing Commitments sq.m net	Additional Retail Sales Floorspace sq.m net			
		2012-2019	2019-2024	2024-2029	Total 2012-2029
Abingdon	-	1,026	608	630	2,264
Wantage/Grove	-	1,262	387	401	2,050
Botley	-	0	2	73	75
Faringdon	1,260	72	144	148	364
Other VOWH	-	35	263	272	570
<b>Total</b>	<b>1,260</b>	<b>2,327</b>	<b>1,404</b>	<b>1,523</b>	<b>5,322</b>

Table 6.2: Comparison Goods Retail Floorspace Projections

Location	Existing Commitments sq.m net	Additional Retail Sales Floorspace sq.m net			
		2012-2019	2019-2024	2024-2029	Total 2012-2029
Abingdon	1,350	0	2,320	3,280	5,600
Wantage/Grove	-	1,325	1,077	1,447	3,849
Botley	-	102	145	197	444
Faringdon	144	0	41	148	189
Other VOWH	-	54	85	115	254
<b>Total</b>	<b>1,494</b>	<b>1,481</b>	<b>3,668</b>	<b>5,187</b>	<b>10,336</b>

- 6.6 The floorspace projections in Tables 6.1 and 6.2 take into account commitments but not proposals or the re-occupation of vacant floorspace.

## Non-Retail Uses

- 6.7 It is important to maintain a range of non-retail uses within centres, and where there are deficiencies, plan to improve the overall offer of the centre. In Wantage and Botley, there is a need for additional non-retail (Class A3-A5) uses, in order to complement the retail focus of the centres.
- 6.8 In terms of commercial leisure uses, the District currently lacks facilities such as a cinema, tenpin bowling and bingo. While such facilities may be desirable to meet the needs of local residents, given the proximity of facilities outside the District, we do not consider that there is a need to plan for provision. Our assessment has identified a requirement to provide an additional health and fitness club in the study area to meet the demand from existing residents.

## Strategy Recommendations

### Abingdon

- 6.9 The implementation of a food superstore within the next phase of the Abbey Centre development will meet the need for additional convenience goods floorspace in the town up to 2029.
- 6.10 Comparison sales floorspace within this proposed food store (about 1,400 sq m.net) along with the reoccupation of vacant floorspace in the town centre (200 sq.m net) should be capable of accommodating growth up to 2024. There is no need to allocate further sites for retail development until after 2024. Residual floorspace projections between 2024 and 2029 could be accommodated within the Abbey Centre development depending on the net increase in comparison sales floorspace on the site.

### Wantage/Grove

- 6.11 There is capacity for a medium sized food store in Wantage/Grove by 2019 (1,300 sq m net). However the implementation of a food superstore in Abingdon and the Grove Airfield proposals will reduce this capacity to less than 900 sq.m net. There is no overriding need to allocate a site for a further food store in the short term. In the longer term 2024 to 2029 there could be scope to develop a store of about 1,600 sq.m net. However development at Didcot could further reduce food store capacity in Wantage/Grove.
- 6.12 The Grove Airfield proposals (500 sq.m net) and the reoccupation of vacant shop units (1,100 sq.m net) in Wantage town centre could absorb comparison growth up to and beyond 2019. The residual floorspace projections between 2019 and 2029 could be accommodated on edge of town centre sites on the former Police Station/Magistrates Court site and land to the west of Limborough Road.

### Botley

- 6.13 The convenience goods floorspace projections for Botley are relatively low, but the centre does not adequately cater for main and bulk food shopping trips. The proposed redevelopment of the centre to provide a food superstore would address this qualitative deficiency and would also help to serve Oxford City. Redevelopment would also help to accommodate additional comparison goods sales floorspace.

### Faringdon

- 6.14 The implementation of the Tesco commitment would accommodate growth for the foreseeable future. Additional growth is relatively limited and the focus for further development is likely to be small scale infill and extensions.

### Large Villages

- 6.15 Large villages with projected population growth could also assist in accommodating growth particularly top-up food shopping and day to day comparison goods. Opportunities for small convenience stores (100 to 200 sq.m net) could be considered.

## Summary of Floorspace Requirements

- 6.16 Based on aspirations and the overall strategy for VOWH, Table 6.3 below draws together the total potential floorspace requirements, if all commitments and proposals are implemented and some vacant units are reoccupied. This suggests a total floorspace requirement (Classes A1-A5) of **11,326** sq.m net by 2029.
- 6.17 Due to the commitments and proposals, there is no requirement to allocate additional land by 2019. By 2029, the total floorspace requirement in Wantage/Grove is 4,775 sq.m net. In Abingdon, there is a requirement for

4,840 sq.m net by 2029, although there is no requirement for any of this floorspace to be convenience goods floorspace, as the proposed development at the Abbey Centre will meet all convenience requirements. Following the implementation of proposals at Botley, there is only a limited requirement for additional floorspace by 2029, and no further floorspace allocations are required over the Study period. Similarly, in Faringdon there is a limited requirement for additional floorspace over the Study period, which is likely to be met through small scale infill and extensions, and no allocations are required.

Table 6.3: Total Potential Retail Floorspace Projections

Centre	Commitments and Proposals (sq.m net)		Additional Retail (Class A1-A5) Floorspace (sq.m net)									Re-occupied Vacant Units sq.m net	Total (A1-A5) 2012-2029 sq.m net
			2012-2019			2019-2024			2024-2029				
	A1 Conv	A1 Comp	A1 Conv	A1 Comp	A2-A5	A1 Conv	A1 Comp	A2-A5	A1 Conv	A1 Comp	A2-A5		
Abingdon	2,600	2,750	0	0	0	0	920	184	0	3,280	656	200	<b>4,840</b>
Wantage/Grove	800	500	785	825	322	374	1,077	290	388	1,447	367	1,100	<b>4,775</b>
Botley	3,000	2,000	0	0	0	0	0	0	172	0	34	0	<b>206</b>
Faringdon	1,260	144	15	0	3	139	41	36	144	148	58	0	<b>584</b>
Other VOWH	-	-	0	54	11	244	85	66	269	115	77	0	<b>920</b>
<b>Total</b>	<b>7,660</b>	<b>5,394</b>	<b>800</b>	<b>879</b>	<b>336</b>	<b>757</b>	<b>2,123</b>	<b>576</b>	<b>973</b>	<b>4,990</b>	<b>1,193</b>	<b>1,300</b>	<b>11,326</b>

## Scale of Retail Development

- 6.18 Development should be appropriate in terms of scale and nature to the centre in which it is located.
- 6.19 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.
- 6.20 The CLG Practice Guidance states (para. 7.5) that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The Guidance acknowledged that it may occasionally also be relevant to consider the impact of proposals below this threshold, for example if they are large compared to a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre.
- 6.21 If the NPPF threshold was adopted, then a single development proposal could exceed the entire short to medium term floorspace projections for the District without the need for a retail impact assessment. Proposals that significantly exceed the floorspace projections for each town will reduce the turnover of existing floorspace and this impact should be carefully tested on a case by case basis.
- 6.22 We therefore consider a 2,500 sq.m gross threshold is inappropriate as a blanket threshold within VOWH District, as this scale of development would represent a significant proportion of the overall retail projections in the authority area. Development smaller than 2,500 sq.m gross could have a significant adverse impact on the smaller town centres.
- 6.23 Accordingly, the following thresholds are recommended for all edge and out of centre retail (food and non-food) development proposals:
- 1,000 sq.m gross for Abingdon and Wantage; and
  - 500 sq.m gross elsewhere.
- 6.24 A higher threshold is suggested for Abingdon and Wantage as the main town centres in the District in terms of the amount of retail floorspace. For the other centres, proposals of 500 sq.m gross or will be of greater significance and therefore should be subject to some form of impact assessment.
- 6.25 If considered appropriate, the Council could include these recommended thresholds within a retail policy at the next stages of the Local Plan review as locally set thresholds for requiring impact assessments for retail proposals outside of town centres and not in accordance with an up to date Local Plan, as set out in para. 26 of the NPPF.
- 6.26 The sequential approach indicates that existing centres are the preferred location for new retail, leisure and other uses typically found in town centres.

Some forms of development (up to 500 sq.m gross) may be more appropriate in smaller centres and local parades, if there are localised areas of deficiency. The key issues are the nature and scale of retail development proposed and the catchment area the development seeks to serve.

6.27 In general, development within local centres and parades should primarily serve the community within which it is located, and a catchment area of not more than 800 metres ie. they should primarily serve walk-in catchment areas.

6.28 Based on the scale and role of centres within VOWH District and the floorspace projections within this report, we believe the impact of smaller development proposals below the NPPF threshold could raise concerns. We therefore believe the impact of all out-of-centre retail applications of 1,000 sq.m gross or more should be assessed in the District.

## Future Strategy Implementation and Monitoring

6.29 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres.
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers;
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

6.30 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecast up to 2019, 2024 and 2029. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections up to 2029 should be treated with caution.

6.31 Therefore, we would recommend that this retail study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;

- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Rankings); and
- implemented development within and around the study area.

6.32

These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended.





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