Nathaniel Lichfield & Partners
Planning. Design. Economics.

Retail and Town Centre Study

Addendum

Vale of White Horse District Council

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1.0 Introduction

1.1 This Retail and Town Centre Study Addendum has been prepared on behalf of Vale of White Horse (VOWH) District Council to provide a review of the implications of the additional housing requirements that have been identified for the District, and the likely associated changes in the retail floorspace needs arising from the revised population figures. This Addendum should be read alongside the Retail and Town Centre Study produced by NLP in March 2013.

1.2 The key changes to the assumptions used are set out below.

1. Population Change

1.3 The Local Plan 2031 Part 1 Strategic Sites and Policies Housing Delivery Update (February 2014) identified that there is a need to significantly increase the housing requirement within VOWH over the plan period. The revised housing needs lead to a requirement for a further 7,430 additional homes over the Plan period, above the previous projections. Table 1 in Appendix 2 shows the revised 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.

1.4 A new Zone 7 “Science Vale/West of Didcot” has been added into the assessment, that comprises the major strategic housing allocations to the west of Didcot, totalling 5,250 new homes.

2. Methodology and Data Update

1.5 Updated expenditure data and expenditure growth forecasts is available and has been obtained from Experian - 2012 base year expenditure was published in February 2014. The Addendum is therefore based on the latest available expenditure data, and realistic forecasts based on the latest economic and market conditions.

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

1.7 The previous study assessed needs up to 2029, and this Addendum has been amended to forecast up to 2031, for compliance with other Local Plan documents and evidence.

2.0 Updated Assessment of Retail Needs

Population and Expenditure

2.1 The study area population for 2011 to 2031 is set out in Table 1 in Appendix 2. 2011 Census population data from Experian has been adopted. As noted in the previous section, the housing figures for the district have increased for the Plan period. The latest Oxfordshire County Council's Research and Intelligence Unit projections have been applied and been used to project population from 2011 to 2031. Population within the study area is expected to increase between 2011 and 2031 by 39.3% (48,134 people). 12,500 of this population increase is allocated to the new Zone 7. For comparison, in the previous study the population was forecast to increase by 15.3% (18,941 people) between 2012 and 2029.

2.2 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.

2.3 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 50% from £256.54 million in 2014 to £385.42 million in 2031, as shown in Table 3, Appendix 2. This compares to the previous study, which showed an increase of 25% of convenience goods expenditure between 2012 and 2029.

2.4 Total available comparison goods spending is forecast to increase by 110% between 2014 and 2031, increasing from £405.07 million in 2014 to £850.74 million in 2031, as shown in Table 3, Appendix 3. This compares to the previous study, which showed an increase of 72% of comparison goods expenditure between 2012 and 2029.

2.5 The forecast increase in comparison goods spending is as a consequence of the significant growth in population, together with growth in per capita spending over the 17 year period to 2031. 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.

2.6 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. By 2031, this equates to 5.6% of all convenience goods expenditure and 16.0% of all comparison goods expenditure.

Existing Retail Floorspace 2014

2.7 Existing convenience goods retail sales floorspace within VOWH District is 17,073 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores (4,842 sq.m net).

2.8 Comparison goods retail floorspace within VOWH District is estimated as 47,829 sq.m net, as shown in Table 10 in Appendix 3. Around 69% of this floorspace is located in Abingdon, including 42% within retail warehouse units at Fairacres Retail Park/Nuffield Way and 6% in Tesco Extra.

Existing Spending Patterns 2014

2.9 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. The new Zone 7 has not been added in at 2014.

2.10 The convenience goods market shares have been adjusted to take the implementation of the Tesco food store commitment in Faringdon into account, which has opened since the survey was undertaken.

Convenience Shopping

2.11 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.

2.12 Table 4 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 59.0% in Zone 4 (Botley).

2.13 The level of convenience goods expenditure attracted to shops/stores in VOWH in 2014 is estimated to be £228.49 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares, identified in Table 4. The market share of total convenience expenditure generated within the study area that is retained by shops/stores in VOWH (ie. excluding any inflow to these shops/stores from beyond the study area) is estimated to be about 80% of available expenditure (£206.44 million out of £256.54 million). Consequently, just 20% of available expenditure in the study area is leaking to facilities outside VOWH District (about £50 million).

2.14 The total benchmark turnover of the existing convenience sales floorspace within the four main towns (Abingdon, Wantage, Botley and Faringdon) in VOWH District is £170.55 million (Table 11, Appendix 2). The actual turnover of this convenience floorspace is £210.80 million (Table 5, Appendix 2, minus the turnover of “other VOWH”).

2.15 These figures suggest that collectively convenience retail facilities in the four main towns are trading about 24% above average. Within the District as a whole, in 2014 there is estimated to be a surplus of available convenience expenditure of £40.25 million (Table 12, Appendix 2).

Comparison Shopping

2.16 The estimated comparison goods expenditure currently attracted by shopping facilities within VOWH District is £182.95 million in 2014, as shown in Table 5, 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 (ie. excluding any inflow to these shops/stores from beyond the study area) is 40% of available expenditure (£162.19 million out of £405.07 million).

2.17 The lower retention levels compared to the convenience goods market shares reflect the influence of higher order centres outside VOWH District, in particular Oxford, Swindon and Newbury.

2.18 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (47,829 sq.m net) is £3,825 per sq.m net. The analysis of existing comparison shopping patterns in 2014 suggests the following average sales density figures for the centres in the District shown in Table 2.1.

Table 2.1: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2014 (£ per sq.m net)
Abingdon (including Retail Warehouses)	£3,690
Wantage/Grove	£5,239
Faringdon	£2,686
Botley (excluding Homebase)	£2,591
District Average	**£3,825**

2.19 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.

2.20 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

2.21 As a minimum it is appropriate and realistic to plan to maintain the District’s market share of convenience goods expenditure in the future. 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.

2.22 The new Zone 7 has been added into the assessment from 2016, when some of the housing will have been completed, and the adjusted shares are shown in Table 6, Appendix 2. For Zone 7, the results of the household survey for postcode sector OX11 0 (within Zone 2) have been obtained and used as a basis for estimating the market shares, as this is the area where most of the new housing will be located.

2.23 The level of available convenience goods expenditure in 2016, 2021, 2026 and 2031 is shown at Tables 7, 8, 9 and 10 in Appendix 2.

2.24 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 £228.49 million in 2014 to £343.35 million in 2031.

2.25 Table 12 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an expenditure surplus of £40.25 million convenience goods expenditure in 2014. This surplus will increase to £59.24 million in 2016. Continued future growth produces a surplus of £107.85 million in 2021, increasing to £137.37 million in 2026 and £155.10 million in 2031.

2.26 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 13. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.

2.27 The surplus of available expenditure up to 2021 indicates that there is a short to medium term requirement for additional convenience goods floorspace in the District of 8,296 sq.m net (11,852 sq.m gross). Surplus expenditure at 2031 could support 11,931 sq.m net of sales floorspace (17,044 sq.m gross) in the District as a whole, as shown in Table 12, Appendix 2.

2.28 The previous study suggested a convenience goods projection of 5,322 sq.m net (7,603 sq.m gross) at 2029.

Commitments and Proposals

2.29 There are a number of emerging convenience goods commitments and proposals in the District, as set out at the foot of Table 11 in Appendix 2.

2.30 An application has been submitted for the redevelopment of the Westway Shopping Centre at Botley (ref. P13/V2733/FUL). The application is for the *"demolition of a mix of existing buildings and the erection of mixed use development comprising retail, restaurants and cafes, offices, hotel, student accommodation and ancillary facilities, 33 apartments, replacement vicarage, library and place of worship, health centre, cinema, gymnasium, covered car parking and access, public square, landscaping and associated works"*.

2.31 The retail element of the Botley proposals is broken down as follows:

- food store of 4,831 sq.m net, split 2,898 sq.m net convenience goods floorspace and 1,932 sq.m net comparison goods floorspace;
- 526 sq.m net of other convenience goods floorspace; and
- 1,578 sq.m net of other comparison goods floorspace.

2.32 A decision has not yet been made on this application.

2.33 Outline planning permission has been granted for an enlarged supermarket within a new district centre at Great Western Park, Didcot (ref. P13/V0169/O). This 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.

2.34 The Abbey Shopping Centre and The Charter Development Brief includes a large food superstore in Abingdon, and the redevelopment of this area remains an aspiration of the Council. We have made an assumption based on the potential maximum size of this store (6,500 sq.m gross), for the purposes of this assessment, 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.

2.35 A new local centre is also proposed at Grove Airfield, and there is a resolution to grant planning permission for this development, subject to a S.106 Agreement (ref. P12/V0299/O). 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.

2.36 If these developments are implemented, they will alter shopping patterns and the floorspace capacity projections. Convenience goods market shares have been adjusted in Table A in Appendix 2 assuming all these proposals are implemented by 2021. 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, including the new Waitrose scheme on Botley Road (administrative area of Oxford City), and partly through retaining spending in Zone 4 that is currently directed to stores in Abingdon; and

- 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.

2.37 The revised capacity figures are shown in Table B in Appendix 2.

2.38 In taking these proposals into account, the floorspace projection for 2021 reduces from 8,296 sq.m net (Table 13) to 2,320 sq.m net (Table C). The projection at 2031 reduces from 11,931 sq.m net (Table 13) to 6,136 sq.m net (Table C). Most of the remaining capacity at 2031 relates to Abingdon (2,277 sq.m net) and Wantage/Grove (1,823 sq.m net). Residual capacity is also identified in 2031 at Science Vale/West of Didcot (907 sq.m net) and Faringdon (895 sq.m net).

Capacity for Comparison Goods Floorspace

2.39 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.

2.40 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 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.

2.41 The new Zone 7 has been added into the assessment from 2016, when some of the housing will have been completed, and the adjusted shares are shown in Table 6, Appendix 3. For Zone 7, the results of the household survey for postcode sector OX11 0 (within Zone 2) have been obtained and used as a basis for estimating the market shares, as this is the area where most of the new housing will be located.

2.42 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 and Didcot. 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.

2.43 Available comparison goods expenditure has been projected forward to 2016, 2021, 2026 and 2031 based on the adjusted household survey penetration rates in Tables 7, 8, 9 and 10 in Appendix 3, and summarised in Table 12. Available comparison expenditure to facilities within the District is expected to increase from £182.95 million in 2014 to £382.91 million in 2031.

2.44 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (ie. 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 is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. 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.

2.45 Within the District there will be a small expenditure surplus of £12.12 million by 2016, with most of the growth in expenditure absorbed by home shopping and growth in turnover efficiency for existing floorspace. By 2021, future expenditure growth generates an expenditure surplus of £54.84 million, increasing to £93.07 million in 2026 and £126.74 million in 2031.

2.46 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 13, Appendix 3, using an average sales density of £5,000 per sq.m in 2014. The surplus expenditure at 2021 could support 9,548 sq.m net (12,731 sq.m gross) comparison goods floorspace, or 14,676 sq.m net (19,568 sq.m gross) by 2026. The projection to 2031 is 18,102 sq.m net (24,136 sq.m gross), which represents a 38% increase in floorspace over the plan period.

2.47 The previous retail study suggested a comparison goods projection of 11,829 sq.m net (15,773 sq.m gross) at 2029.

Commitments and Proposals

2.48 As noted above, the redevelopment proposals of the Westway Shopping Centre at Botley include 3,510 sq.m net of comparison sales floorspace. This figure exceeds the Botley capacity projection of 599 sq.m net at 2031, 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.

2.49 Planning permission has also been granted for the redevelopment of the Seacourt Tower Retail Park (ref. P/13/C0294/FUL). This development will create 13,522 sq.m gross (10,818 sq.m net) of comparison goods floorspace, replacing the existing Homebase and vacant retail warehouse units. The market shares have been adjusted to take this into account.

2.50 The comparison goods floorspace of the proposed supermarket within the new district centre at Great Western Park, Didcot equates to 309 sq.m net, which would absorb an element of the floorspace requirements within the Science Vale/West Didcot area by 2031.

2.51 The food superstore proposed within The Abbey Shopping Centre and The Charter Development Brief could provide around 1,470 sq.m net of comparison goods sales (35% of total sales floorspace). This would further reduce the Abingdon projection.

2.52 We have assumed that 20% of the retail space at the proposed new local centre at Grove Airfield would be comparison goods floorspace (500 sq.m net), and this would absorb some of the Wantage/Grove projection.

2.53 Adjustments have been made to the comparison goods market shares in Table A in Appendix 3, to make an allowance for the likely changes to shopping patterns following the implementation of the Botley proposals. The key adjustments made to the market shares are:

- increase the inflow from outside the District to Botley from 5% to 25%;
- increase the market share of Botley within Zone 4 from 3% to 15% - 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;
- increase the market share of Botley within Zone 3 from 0.2% to 1.5%; and
- increase the market share for the Seacourt Tower Retail Park in all zones, through a combination of reducing the existing share of Abingdon (Fairacres Retail Park), Botley Retail Park and Oxford.

2.54 The revised capacity figures are shown in Table B in Appendix 3.

2.55 In taking these proposals into account, the floorspace projection for 2021 reduces from 9,548 sq.m net (Table 13) to 514 sq.m net (Table C). The projection at 2031 reduces from 18,102 sq.m net (Table 13) to 10,113 sq.m net (Table C). Most of the remaining capacity at 2031 relates to Abingdon (5,561 sq.m net), Science Vale/West of Didcot (4,232 sq.m net) and Wantage/Grove (2,336 sq.m net). There is a negative requirement for additional retail floorspace at the Seacourt Tower Retail Park following the implementation of the approved development (-2,961 sq.m net by 2031).

3.0 Updated Strategy for Accommodating Growth

Floorspace Projections

3.1 The floorspace projections set out in the previous section 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.

3.2 Projections up to 2021 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 2026 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.

3.3 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.

3.4 The assessment of the potential capacity for new retail floorspace within the previous section suggests that there is scope for new retail development within VOWH District over the Plan period (to 2031). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

3.5 In the medium term, using the existing market shares, the projections up to 2021 suggest that, before commitments and proposals are taken into account, there is scope for 11,852 sq.m gross of convenience goods floorspace and 12,731 sq.m gross of comparison goods floorspace.

3.6 These projections relate to Class A1 retail uses only. Based on the current mix of floorspace within centres in VOWH, 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, ie. around 6,151 sq.m gross by 2021. On this basis the overall projection for VOWH District (Class A1 to A5) would be 30,753 sq.m gross by 2021. Table 3.1 below summarises the floorspace projections by centre.

Table 3.1: Summary of Floorspace Requirements, 2021 (sq.m gross) – Before Commitments and Proposals

Centre	A1 Conv	A1 Comp	Service	Total
Abingdon	5,466	5,507	2,743	13,716
Wantage/Grove	2,543	1,557	1,025	5,125
Botley (incl. Seacourt Tower RP)	315	380	174	869
Faringdon	951	321	318	1,590
Other VOWH	381	259	160	800
Science Vale/West of Didcot	2,216	4,706	1,731	8,653
District Total	**11,852**	**12,731**	**6,151**	**30,753**

Source: Table 13, Appendix 2 and Appendix 3

3.7 Table 3.2 sets out the floorspace projections for 2021, once all the retail commitments and proposals have been taken into account and adjustments have been made to the market shares.

Table 3.2: Summary of Floorspace Requirements, 2021 (sq.m gross) – After Commitments and Proposals

Centre	A1 Conv	A1 Comp	Service	Total
Abingdon	1,149	830	495	2,474
Wantage/Grove	1,596	890	622	3,108
Botley	[-868] [1]	[-477] [1]	n/a	0
Seacourt Tower Retail Park	n/a	[-5,093] [1]	n/a	0
Faringdon	762	321	271	1,354
Other VOWH	225	259	121	605
Science Vale/West of Didcot	451	4,294	1,186	5,931
District Total [1]	**4,183** [1]	**6,594** [1]	**2,695**	**13,472**

Source: Table C, Appendix 2 and Appendix 3

Notes: [1] Negative floorspace requirements removed from total

3.8 In the longer term, using the existing market shares, the projections up to 2031 suggest that, before commitments and proposals are taken into account, there is scope for 17,044 sq.m gross of convenience goods floorspace and 24,136 sq.m gross of comparison goods floorspace, and around 10,296 sq.m of service floorspace.

3.9 The overall projection for VOWH District (Class A1 to A5) would be 51,476 sq.m gross by 2031. Table 3.3 below summarises the floorspace projections by centre.

Table 3.3: Summary of Floorspace Requirements, 2031 (sq.m gross) – Before Commitments and Proposals

Centre	A1 Conv	A1 Comp	Service	Total
Abingdon	7,605	12,482	5,022	25,109
Wantage/Grove	3,619	3,781	1,850	9,250
Botley (incl. Seacourt Tower RP)	498	681	295	1,474
Faringdon	1,495	631	532	2,658
Other VOWH	767	506	318	1,591
Science Vale/West of Didcot	3,060	6,055	2,279	11,394
District Total	**17,044**	**24,136**	**10,296**	**51,476**

Source: Table 13, Appendix 2 and Appendix 3

3.10 Table 3.4 sets out the floorspace projections for 2031, once all the retail commitments and proposals have been taken into account and adjustments have been made to the market shares.

Table 3.4: Summary of Floorspace Requirements, 2031 (sq.m gross) – After Commitments and Proposals

Centre	A1 Conv	A1 Comp	Service	Total
Abingdon	3,253	7,415	2,667	13,335
Wantage/Grove	2,604	3,114	1,430	7,148
Botley	[-237] [1]	123	31	154
Seacourt Tower Retail Park	n/a	[-3,702] [1]	n/a	0
Faringdon	1,279	631	478	2,388
Other VOWH	571	506	269	1,346
Science Vale/West of Didcot	1,295	5,643	1,735	8,673
District Total [1]	**9,002** [1]	**17,432** [1]	**6,610**	**33,050**

Source: Table C, Appendix 2 and Appendix 3

Notes: [1] Negative floorspace requirements removed from total

3.11 This demonstrates that there is still a significant retail floorspace requirement for the District, over and above the committed and proposed floorspace over the Plan period, primarily in Abingdon and Wantage/Grove, and in the Science Vale/West of Didcot area to support the new areas of housing growth.

Accommodating Future Growth

3.12 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development.

3.13 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 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

3.14 The 2013 Study identified that there were 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 was just below the Goad national average of 13.7% (June 2012). The vacancy rate was significantly higher in Wantage at 16.7%, and relatively low in Faringdon and Botley. The total amount of vacant floorspace was estimated to be approximately 6,770 sq.m gross.

3.15 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)

3.16 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2031 would reduce only marginally from around 37,700 sq.m gross (Table 3.2) to 36,000 sq.m gross.

3.17 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.

Development Opportunities

Abingdon

3.18 As indicated above, the provision of a large food store within the Abbey Shopping Centre redevelopment (2,730 sq.m net of convenience goods and 1,470 sq.m net comparison goods net sales area) will accommodate some of the growth up to 2031. However, there remains a requirement for a significant requirement for additional retail floorspace within Abingdon, and options for maximising the increase in retail floorspace at the Abbey Centre should be considered.

3.19 There may also be potential to locate additional retail development on existing car parks within Abingdon town centre that are currently underutilised, including the Waitrose car park and adjacent Council owned car parks. A potential development area of around 1.3 hectares could be assembled. Any redevelopment scheme is likely to need to re-provide some car parking on part of the site in the form of multi-level parking. The provision of multi-level car parking could free up a significant part of the site for new town centre uses. The area could potentially accommodate over 6,000 sq.m gross of commercial floorspace at ground floor level. If developed comprehensively this area could accommodate a significant proportion of the projected capacity for Class A uses in Abingdon up to 2031.

3.20 Elsewhere within Abingdon town centre, development options appear to be limited, unless windfall opportunities become available eg. 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.

3.21 In terms of edge of centre, ie. 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.

3.22 If Abingdon cannot accommodate the floorspace projection within the town centre, then the Council could seek to allocate sites elsewhere within the District to accommodate the long term projections. For example it may be appropriate to direct an element of Abingdon's floorspace projections to provide local shopping facilities within the new housing developments around Abingdon or to the Science Vale/West of Didcot area. This potential is considered below.

Wantage

3.23 As indicated above, even taking into account the potential reoccupation of vacant units within Wantage town centre and commitments/proposals, the residual floorspace requirement for Wantage at 2031 is around 5,700 sq.m gross.

3.24 The former Police Station and Magistrates Court occupies a site of 0.28 hectares. 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.

3.25 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.

3.26 Again, if Wantage cannot accommodate the floorspace projection within the town centre, then the Council could seek to allocate sites elsewhere within the District to accommodate the long term projections.

Botley

3.27 Redevelopment proposals for the Westway Shopping Centre, if permitted and implemented, are likely to accommodate growth in Botley up to 2031. The redevelopment of the Seacourt Tower Retail Park, if implemented, would be sufficient to more than meet Botley's floorspace projection up to 2031, and some of the floorspace needs identified elsewhere in the District, including Abingdon-on-Thames, absorbed by the developments in Botley.

Faringdon

3.28 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.

Science Vale/West of Didcot

3.29 The new Zone 7 covers the Science Vale/West of Didcot area where a significant amount of new housing development is proposed over the Plan period to 2031. New retail floorspace will be required within this area to meet the needs of the new resident population. Population growth is also forecast within the adjacent areas to the west of Didcot that are located within South Oxfordshire District Council's administrative area. The capacity assessment has estimated the needs of the future residents of this area using our judgement on the likely future shopping patterns and potential levels of spending that could be retained and directed to new retail floorspace, without adversely affecting the existing centres within VOWH or Didcot town centre.

3.30 Planning permission has been granted for a new district centre at Great Western Park, within the Science Vale/West of Didcot area, and this will absorb some of the forecast retail floorspace capacity, however Table 3.2 shows that there is a significant requirement for floorspace over and above the proposed floorspace in the new district centre. It may therefore be appropriate for some of the floorspace needs identified for Science Vale/West of Didcot to be directed to a larger district centre at Great Western Park.

3.31 Additional development at the Orchard Centre in Didcot town centre potentially includes a 20,000 sq.m retail-led mixed use extension to the existing shopping centre. We understand work is also progressing on the Didcot Gateway site connecting the train station to the town centre, which will include some additional retail floorspace. If these developments are brought forward, given the proximity of Didcot to the Science Vale/West of Didcot housing area, it is likely that this would lead to Didcot increasing its market share of Zone 7 residents' expenditure.

3.32 We are also aware that there are longer term proposals for the "Didcot A" Didcot Power Station site that could include a significant amount of retail floorspace. The majority of the site falls within VOWH. A screening opinion submitted for the site (P14/V1862/SCR) identified that proposals for the site could include 400 dwellings, up to 110,000 sq.m B2/B8 floorspace and up to 45,000 sq.m of mixed B1 and A1 floorspace. The nature of the proposed retail floorspace is not specified, however given the predominance of employment floorspace, it is likely that the retail element would include big space users such as bulky goods retail warehousing and/or a supermarket.

3.33 If these proposals come forward in the longer term, they are likely to absorb the residual retail floorspace requirement for Science Vale/West of Didcot. In addition, if sites are not available within the existing market towns to accommodate the forecast retail floorspace needs in the medium to long term, particularly in Abingdon, then it may be appropriate for the Didcot A site to absorb some of the floorspace requirements.

Bulky Comparison Goods Retailing

3.34 The retail floorspace requirements within this assessment have identified the needs for general comparison goods retail floorspace, and not broken down the comparison floorspace into bulky/non-bulky goods floorspace. This follows the removal of the class of goods approach from the sequential test analysis, ie. directing all floorspace to town centres.

3.35 As shown in Table 11, Appendix 3, existing retail warehouse floorspace in the District accounts for around 50% of the total comparison goods floorspace, primarily due to the concentration of units at Fairacres Retail Park, Abingdon. The proposed development at Seacourt Tower Retail Park will further increase the retail warehouse provision.

3.36 It would not be unreasonable for up to 25% of the identified comparison goods floorspace needs to be used for bulky goods. This could equate to around 3,500 sq.m gross by 2031. As noted above, the potential development at Didcot A may include an element of bulky goods retail warehousing. Any proposal for bulky goods retail floorspace that is not within town centres, such as further development at Fairacres Retail Park, would need to demonstrate compliance with the sequential test.

Strategic Residential Allocations

3.37 In order to meet the identified housing needs for the VOWH up to 2031, a number of strategic housing allocations need to be made. If large housing developments take place, it would be appropriate to direct some of the identified retail floorspace requirements for the District to serve these locations. It should be noted that these proposed new dwellings (and the population they will accommodate) have been taken into account within the capacity projections within this study.

3.38 In order to give an indication of the levels of floorspace that could realistically be accommodated within the large housing developments, Table 3.5 below estimates the retail expenditure that will be generated by the two largest of these potential residential allocations, and estimates how much of this spending that could realistically be retained within any local provision provided within these developments. Table 3.5 converts retained expenditure into floorspace requirements. In undertaking these calculations, the following assumptions have been made:

1. the needs of the new residential development has been considered in isolation, with no inflow from existing residents in the surrounding area;
2. development will be completed between 2014 and 2031, and the VOWH average household size (2.4) for the proposed new development is adopted;
3. available convenience and comparison goods expenditure per person is based on the average for the six study area zones in 2031 (Table 2, Appendix 2 and 3);
4. not all of the convenience and comparison goods expenditure will be available to support local retail facilities in the proposed new housing development, as expenditure will continue to be attracted to other centres and existing superstores;
5. given the size of the residential developments and using our judgement based on schemes elsewhere, up to 30% of convenience goods expenditure and 10% of comparison goods expenditure could be retained to support the proposed local retail floorspace;
6. for convenience goods, the estimated retention figure reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided;
7. for comparison goods, a much lower proportion of available expenditure will be retained, recognising that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy; and
8. an average sales density for local shopping facilities of £5,000 per sq.m have been applied, to convert the retained expenditure to floorspace requirements.

Table 3.5: Potential Retail Floorspace Requirements within Residential Developments

	North Shrivenham	North Abingdon-on-Thames
Population		
No. of dwellings	500	800
Average household	2.4	2.4
Total Population	1,200	1,920
Convenience Goods		
Convenience Goods Expenditure per capita at 2031	£2,261	£2,261
Total Available Convenience Goods Expenditure	£2.71 million	£4.34 million
Retained Convenience Goods Expenditure (30%)	£0.81 million	£1.30 million
Convenience Goods Floorspace Turnover, £ per sq.m	£5,000	£5,000
Floorspace sq.m net	162 sq.m net	260 sq.m net
Floorspace sq.m gross	231 sq.m gross	371 sq.m gross
Comparison Goods		
Comparison Goods Expenditure per capita (2031)	£5,017	£5,017
Total Available Comparison Goods Expenditure	£6.02 million	£9.63 million
Retained Comparison Goods Expenditure (10%)	£0.60 million	£0.96 million
Comparison Goods Floorspace Turnover, £ per sq.m	£5,000	£5,000
Floorspace sq.m net	120 sq.m net	192 sq.m net
Floorspace sq.m gross	160 sq.m gross	256 sq.m gross

3.39 Table 3.5 considers the potential retail requirements for strategic housing allocations at North Shrivenham and North Abingdon-on-Thames as an indication of potential retail needs generated by the larger strategic housing developments. The provision of local shopping facilities is appropriate within developments of this size, in order to ensure residents have day to day shops and services within walking distance of their home, which will reduce car travel.

3.40 Table 3.5 indicates that the number of new dwellings proposed in each location (500 to 800 dwellings) is generally only sufficient to support a small scale local shopping centre. A development of 500 houses generates a requirement for around 400 sq.m gross of retail floorspace (around five small shop units). The larger allocation of 800 houses generates a requirement for around 650 sq.m gross of retail floorspace. In total, the two housing allocations identified in Table 3.3 could account for around 4% of the District’s total retail floorspace projection up to 2031 (around 28,500 sq.m gross). Other strategic housing allocations should also seek to incorporate some form of local shopping provision, in order to serve local residents and contribute towards meeting the identified retail floorspace requirements for the District.

3.41 Local centres of this scale would not be capable of meeting both main and top-up convenience shopping needs. Typically, local centres serving relatively small catchments would primarily serve top-up food shopping needs. Local centres may typically include a small convenience store under the Sunday Trading Act threshold (280 sq.m net), supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.

3.42 The figures in Table 3.5 suggest a total requirement of between 400 sq.m gross and 650 sq.m gross of retail floorspace in each centre. Non-retail services (Class A1 services and Class A2 to A5) could increase the size of centre to between 500 sq.m gross and 800 sq.m gross.

3.43 Although the population within a strategic residential development scheme could potentially support a local centre, it is essential to ensure that any local centre proposed is both commercially viable and capable of delivery. Further work would need to be produced to support any planning application for retail floorspace in this location to demonstrate that the development proposed is appropriate in terms of its scale and position within the development, the context of the surrounding area, and whether it is likely to be of interest to retailers.

4.0 Conclusions and Recommendations

4.1 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.

4.2 The main change since the previous study was produced is the increase in the housing numbers for the District, and this has resulted in a need for a significantly higher amount of retail floorspace over the Plan period to meet the needs of residents within the study area.

Meeting Shopping Needs in VOWH

4.3 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 2031.

4.4 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.

4.5 Long term forecasts up to and beyond 2026 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

4.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within VOWH. Tables 4.1 and 4.2 below suggest the distribution of the new convenience and comparison goods floorspace requirements by centre (over and above commitments/proposals). It should be noted that the proposed development at Didcot A has not been included as a proposal given that the nature and quantum of retail floorspace proposed has not been identified at this stage.

Table 4.1: Convenience 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	2,730	805	940	532	2,277
Wantage/Grove	800	1,117	465	241	1,823
Botley	3,424	- 608	294	148	- 166
Faringdon	-	533	225	137	895
Other VOWH	-	157	152	91	400
Science Vale/ West of Didcot	1,235	316	315	276	907
Total	**8,189**	**2,320**	**2,391**	**1,425**	**6,136**

Table 4.2: 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	622	2,954	1,985	5,561
Wantage/Grove	500	668	1,029	639	2,336
Botley	3,510	- 357	297	153	93
Seacourt Tower Retail Park	10,818	- 4,074	720	393	- 2,961
Faringdon	-	241	139	93	473
Other VOWH	-	195	111	73	379
Science Vale/ West of Didcot	309	3,221	558	453	4,232
Total	**16,607**	**516**	**5,808**	**3,789**	**10,113**

Source: Table C, Appendix 2 and Appendix 3

4.7 The floorspace projections in Tables 4.1 and 4.2 do not take into account the re-occupation of vacant floorspace.

4.8 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 in particular, there is a need for additional non-retail (Class A3-A5) uses, in order to complement the retail focus of the centres.

Strategy Recommendations

Abingdon

4.9 There is a requirement for around 7,800 sq.m net of additional convenience and comparison goods floorspace within Abingdon over the Plan period to 2031, in addition to the proposed food store at the Abbey Centre.

4.10 The implementation of a food superstore within the next phase of the Abbey Centre development, and the potential reoccupation of vacant floorspace, will only partly meet the need for additional convenience goods and comparison goods floorspace in the town in the short to medium term.

4.11 There is a need to allocate further sites for retail development in the short to medium term. The consolidated car parks site could potentially accommodate over 6,000 sq.m gross of commercial floorspace at ground floor level, and this site could accommodate a significant proportion of the residual floorspace projections for Abingdon.

4.12 Given that there is limited scope to accommodate major developments within the town centre, it is likely that a proportion of the retail floorspace needs identified for Abingdon should be diverted to new, large housing developments, either in close proximity to Abingdon or elsewhere in the District including the Science Vale/West Didcot area, in order to meet the needs of new local residents. The exact form that this takes would need to be subject to further analysis.

4.13 Any proposed additional retail warehouse development at Fairacres Retail Park or other out of centre locations would need to demonstrate compliance with the sequential test.

Wantage/Grove

4.14 There is a requirement for around 4,200 sq.m net of additional convenience and comparison goods floorspace within Wantage/Grove over the Plan period to 2031, in addition to the new local centre at Grove Airfield.

4.15 There are potential edge of centre sites within Wantage that could be configured to accommodate the retail floorspace requirements in the short to medium term. The reoccupation of vacant shop units could also absorb some of the growth up to 2021.

4.16 If the longer term retail requirements for Wantage/Grove cannot be accommodated within the centres, this floorspace should be diverted to new, large housing developments in close proximity, in order to meet the needs of new local residents.

Botley

4.17 The proposed redevelopment of the Westway Shopping Centre and the Seacourt Tower Retail Park will more than meet the convenience and comparison goods floorspace requirements for Botley over the Plan period, and address the existing deficiency in retail and leisure provision for local residents. There is no requirement to plan for additional development over the Plan period, and the implementation of the Seacourt Tower Retail Park development could help to absorb some of the identified comparison goods floorspace needs elsewhere in the District, including Abingdon-on-Thames.

4.18 The proposed redevelopment of the Westway Shopping Centre to provide a food superstore and comparison goods floorspace would address a qualitative deficiency in Botley and would also help to serve Oxford City.

Faringdon

4.19 The recent implementation of a new Tesco store in the town centre partly addressed the need for additional retail floorspace, however there is still a requirement for further development to accommodate growth for the future. Additional growth is relatively limited and the focus for further development is likely to be small scale infill and extensions.

Science Vale/West of Didcot

4.20 The new district centre at Great Western Park will serve new residents within the Science Vale/West of Didcot area, however there are identified retail floorspace requirements over and above this level of floorspace provision. As stated in the previous section, it may be necessary to allocate a larger district centre that would be appropriate to meet a greater proportion of the required needs of the new local residents over the Plan period. Future development at Didcot A is likely to absorb any residual capacity over the Plan period. As noted above, this could potentially include some bulky goods retail warehousing.

Residential Allocations

4.21 The identified need for additional retail floorspace in the District over the Plan period is unlikely to be met within the existing town centres. Given that there will need to be strategic residential allocations in order to meet the housing needs for the District, it is appropriate to plan for an element of the retail floorspace needs to be directed to new local centres within the housing developments, to support the new local residents. Any proposed new centres would need to ensure that they complement rather than compete directly with existing centres.

Large Villages

4.22 Other local centres and villages in the District have an important role in providing day to day shops and services that are accessible to residents in villages and rural parts of the District. The villages could also assist in accommodating growth, particularly top-up food shopping and day to day comparison goods.

Summary of Floorspace Requirements

4.23 Based on aspirations and the overall strategy for VOWH, Table 4.3 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 19,994 sq.m net by

2031. This is a significant increase from the previous study, which identified total floorspace needs in the District of 11,326 sq.m net by 2029. This increase is primarily driven by the increase in the housing numbers within VOWH.

4.24 By 2031, the total floorspace requirement in Abingdon is 9,598 sq.m net, and the majority of this floorspace requirement is for comparison goods floorspace, primarily due to the proposed food store development at the Abbey Centre, which will absorb some of the convenience goods requirements. In Wantage/ Grove the total floorspace requirement by 2031 is 4,099 sq.m net, once vacant floorspace has been reoccupied.

4.25 The new housing developments in the Science Vale/West of Didcot area generate a total floorspace requirement of 6,423 sq.m net by 2031. The new district centre at Great Western Park absorbs some of the floorspace requirements of the new residents but will not meet these needs in full. Developments at Didcot are likely to absorb some of this floorspace requirement.

4.26 A proportion of the floorspace requirements for Abingdon and Wantage/Grove that cannot be accommodated within the town centres should be directed to new residential developments in the Science Vale/West of Didcot area.

4.27 Following the implementation of proposals at Botley, there is no requirement for additional floorspace by 2031, and no further floorspace allocations are required over the Plan period. Similarly, in Faringdon there is a limited requirement for additional floorspace over the Plan period, which should be met through small scale infill and extensions, and no allocations are required.

Table 4.3: 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	Total (A1-A5) 2014-2031
			2014-2021			2021-2026			2026-2031				
	A1 Conv	A1 Comp	A1 Conv	A1 Comp	Service	A1 Conv	A1 Comp	Service	A1 Conv	A1 Comp	Service	sq.m net	sq.m net
Abingdon	2,730	1,470	805	622	357	940	2,954	974	532	1,985	629	200	9,598
Wantage/Grove	800	500	1,117	668	446	465	1,029	374	241	639	220	1,100	4,099
Botley	3,424	3,510	- 608	- 357	0	294	297	148	148	153	75	0	150
Seacourt Tower Retail Park	-	10,818	0	- 4,074	0	0	720	0	0	393	0	0	-2,961
Faringdon	-	-	533	241	194	225	139	91	137	93	58	0	1,711
Other VOWH	-	-	157	195	88	152	111	66	91	73	41	0	974
Science Vale/ West of Didcot	1,235	309	316	3,221	884	315	558	218	276	453	182	0	6,423
Total	**8,189**	**16,607**	**2,320**	**516**	**1,969**	**2,391**	**5,808**	**1,870**	**1,425**	**3,789**	**1,205**	**1,300**	**19,994**

Future Strategy Implementation and Monitoring

4.28 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 for locally set thresholds 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; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

4.29 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 addendum provides a broad overview of the potential need for further retail development in the short – medium term up to 2021, with longer term forecast up to 2026 and 2031. 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 longer-term projections up to 2031 should be treated with caution.

4.30 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised 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; and
- implemented development within and around the study area.

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

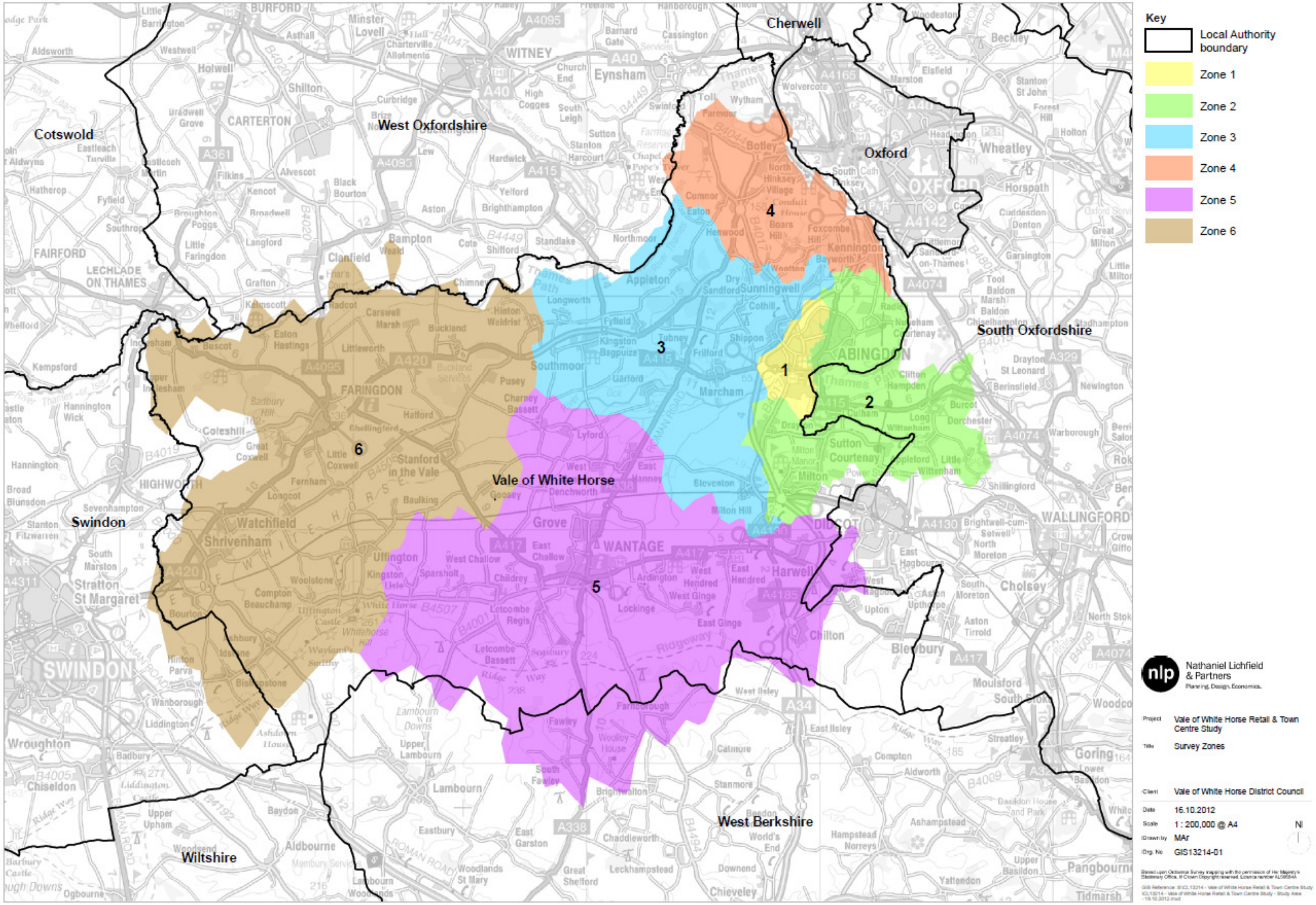
Appendix 1 Study Area and Methodology

Vale of White Horse Study Area Zones

Zone	Area	Postcode Sectors
1	Abingdon	OX14 1 OX14 5
2	Abingdon Rural East	OX14 2 OX14 3 OX14 4
3	Abingdon Rural West	OX13 5 OX13 6
4	Botley	OX1 5 OX2 9
5	Wantage	OX11 0 OX12 0 OX12 7 OX12 8 OX12 9
6	Faringdon	SN6 8 SN7 7 SN7 8

A new Zone 7 has also been created to be included in this assessment that covers parts of Zones 2 and 5, and include the new strategic residential allocations for the Science Vale/West of Didcot area.

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 11, October 2013) which is the most up to date information available.

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 have been obtained.

5 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11) 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 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

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 ie. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. 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.

8 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 eg. 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 2012 is:

- 7% of convenience goods expenditure; and
- 14% of comparison goods expenditure.

9 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 2012 are:

- 2.1% of convenience goods expenditure; and
- 10.5% of comparison goods expenditure.

10 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.

11 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.

12 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.

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

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 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 Verdict (UK Food and Grocery Retailers) and 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

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. 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.

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.

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.

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 £170.55 million (Table 10, Appendix 2).

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 1: Study Area Population

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
Total	**122,552**	**125,255**	**131,260**	**154,730**	**165,944**	**170,686**

Sources:

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	1,912	1,919	1,969	2,038	2,109
Zone 2: Abingdon Rural East	2,031	2,038	2,091	2,164	2,240
Zone 3: Abingdon Rural West	1,984	1,992	2,043	2,115	2,189
Zone 4: Botley	2,226	2,235	2,292	2,373	2,456
Zone 5: Wantage	2,080	2,088	2,141	2,217	2,295
Zone 6: Faringdon	2,065	2,073	2,126	2,201	2,279
Zone 7: Science Vale/West of Didcot	n/a	2,063	2,116	2,190	2,267

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015

Excludes Special Forms of Trading

Zone 7 assumes average of Zones 2 and 5

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	39.72	41.56	49.73	54.69	57.67
Zone 2: Abingdon Rural East	49.75	51.81	61.40	66.93	69.93
Zone 3: Abingdon Rural West	27.37	28.43	33.53	36.37	37.81
Zone 4: Botley	35.09	36.26	42.29	45.40	46.67
Zone 5: Wantage	64.76	67.03	78.45	84.49	87.17
Zone 6: Faringdon	39.87	41.81	50.26	55.50	58.78
Zone 7: Science Vale/West of Didcot	n/a	2.93	10.52	18.66	27.38
Total	**256.54**	**269.84**	**326.17**	**362.05**	**385.42**

Source: Tables 1 and 2

Table 4: Base Year 2014 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	% Inflow
Abingdon							
Waitrose	20.7%	32.4%	13.5%	11.4%	0.3%	0.3%	10.0%
Tesco Extra	39.5%	24.7%	37.7%	11.7%	3.9%	1.2%	10.0%
Other Abingdon Shops	26.0%	17.8%	9.7%	2.0%	0.0%	0.0%	10.0%
Sub-Total	**86.2%**	**74.9%**	**60.9%**	**25.1%**	**4.2%**	**1.5%**	
Wantage							
Sainsbury's	1.7%	0.0%	2.6%	0.0%	38.0%	5.7%	10.0%
Waitrose	0.0%	0.0%	0.0%	0.0%	24.3%	2.9%	10.0%
Other Wantage/Grove	0.7%	0.0%	0.0%	0.0%	15.9%	0.6%	10.0%
Sub-Total	**2.4%**	**0.0%**	**2.6%**	**0.0%**	**78.2%**	**9.2%**	
Other VOWH							
Botley	0.3%	0.0%	1.7%	27.2%	0.2%	0.3%	20.0%
Faringdon	0.0%	0.6%	3.0%	0.0%	3.0%	50.0%	5.0%
Other VOWH	0.9%	4.8%	17.3%	6.7%	1.6%	14.9%	5.0%
Sub-Total	**1.2%**	**5.4%**	**22.0%**	**33.9%**	**4.8%**	**65.2%**	
VOWH District Total	**89.8%**	**80.3%**	**85.5%**	**59.0%**	**87.2%**	**75.9%**	
Food Stores in Oxford	7.9%	9.4%	4.8%	37.5%	0.1%	0.3%	n/a
Food Stores in Didcot	1.4%	8.4%	1.5%	0.0%	10.5%	0.0%	n/a
Food Stores in Swindon	0.0%	0.0%	2.0%	0.0%	0.6%	20.0%	n/a
Other	0.9%	1.9%	6.2%	3.5%	1.6%	3.8%	n/a
Other Sub-Total	**10.2%**	**19.7%**	**14.5%**	**41.0%**	**12.8%**	**24.1%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

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
Expenditure 2014	**39.72**	**49.75**	**27.37**	**35.09**	**64.76**	**39.87**		
Abingdon								
Waitrose	8.22	16.12	3.69	4.00	0.19	0.12	3.59	35.94
Tesco Extra	15.69	12.29	10.32	4.11	2.53	0.48	5.04	50.45
Other Abingdon Shops	10.33	8.86	2.65	0.70	0.00	0.00	2.50	25.04
Sub-Total	**34.23**	**37.26**	**16.67**	**8.81**	**2.72**	**0.60**	**11.14**	**111.43**
Wantage								
Sainsbury's	0.68	0.00	0.71	0.00	24.61	2.27	3.14	31.41
Waitrose	0.00	0.00	0.00	0.00	15.74	1.16	1.88	18.77
Other Wantage/Grove	0.28	0.00	0.00	0.00	10.30	0.24	1.20	12.02
Sub-Total	**0.95**	**0.00**	**0.71**	**0.00**	**50.64**	**3.67**	**6.22**	**62.19**
Other VOWH								
Botley	0.12	0.00	0.47	9.54	0.13	0.12	2.59	12.97
Faringdon	0.00	0.30	0.82	0.00	1.94	19.93	1.21	24.21
Other VOWH	0.36	2.39	4.73	2.35	1.04	5.94	0.88	17.69
Sub-Total	**0.48**	**2.69**	**6.02**	**11.90**	**3.11**	**25.99**	**4.69**	**54.87**
VOWH District Total	**35.66**	**39.95**	**23.40**	**20.70**	**56.47**	**30.26**	**22.05**	**228.49**
Food Stores in Oxford	3.14	4.68	1.31	13.16	0.06	0.12	n/a	22.47
Food Stores in Didcot	0.56	4.18	0.41	0.00	6.80	0.00	n/a	11.94
Food Stores in Swindon	0.00	0.00	0.55	0.00	0.39	7.97	n/a	8.91
Other	0.36	0.95	1.70	1.23	1.04	1.51	n/a	6.78
Other Sub-Total	**4.05**	**9.80**	**3.97**	**14.39**	**8.29**	**9.61**		**50.10**
TOTAL	**39.72**	**49.75**	**27.37**	**35.09**	**64.76**	**39.87**		**278.60**

Source: Table 3 and 4

Table 6: 2016 Adjusted 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								
Waitrose	20.7%	30.4%	13.5%	11.4%	0.3%	0.3%	1.5%	10.0%
Tesco Extra	39.5%	22.7%	37.7%	11.7%	3.9%	1.2%	3.0%	10.0%
Other Abingdon Shops	26.0%	15.8%	9.7%	2.0%	0.0%	0.0%	0.0%	10.0%
Sub-Total	**86.2%**	**68.9%**	**60.9%**	**25.1%**	**4.2%**	**1.5%**	**4.5%**	
Wantage								
Sainsbury's	1.7%	0.0%	2.6%	0.0%	36.0%	5.7%	2.3%	10.0%
Waitrose	0.0%	0.0%	0.0%	0.0%	22.3%	2.9%	4.1%	10.0%
Other Wantage/Grove	0.7%	0.0%	0.0%	0.0%	13.9%	0.6%	0.0%	10.0%
Sub-Total	**2.4%**	**0.0%**	**2.6%**	**0.0%**	**72.2%**	**9.2%**	**6.4%**	
Other VOWH								
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%	14.3%	6.7%	1.6%	14.9%	3.2%	5.0%
Science Vale/West of Didcot	0.0%	10.0%	3.0%	0.0%	10.0%	0.0%	30.0%	10.0%
Sub-Total	**1.2%**	**15.4%**	**22.0%**	**33.9%**	**14.8%**	**65.2%**	**33.2%**	
VOWH District Total	**89.8%**	**84.3%**	**85.5%**	**59.0%**	**91.2%**	**75.9%**	**44.1%**	
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%	4.4%	1.5%	0.0%	6.5%	0.0%	53.8%	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
Other Sub-Total	**10.2%**	**15.7%**	**14.5%**	**41.0%**	**8.8%**	**24.1%**	**55.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table 7: 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
Expenditure 2016	**41.56**	**51.81**	**28.43**	**36.26**	**67.03**	**41.81**	**2.93**		
Abingdon									
Waitrose	8.60	15.75	3.84	4.13	0.20	0.13	0.04	3.63	36.33
Tesco Extra	16.42	11.76	10.72	4.24	2.61	0.50	0.09	5.15	51.49
Other Abingdon Shops	10.81	8.19	2.76	0.73	0.00	0.00	0.00	2.50	24.97
Sub-Total	**35.83**	**35.70**	**17.32**	**9.10**	**2.82**	**0.63**	**0.13**	**11.28**	**112.80**
Wantage									
Sainsbury's	0.71	0.00	0.74	0.00	24.13	2.38	0.07	3.11	31.14
Waitrose	0.00	0.00	0.00	0.00	16.29	1.21	0.12	1.96	19.58
Other Wantage/Grove	0.29	0.00	0.00	0.00	10.66	0.25	0.00	1.24	12.44
Sub-Total	**1.00**	**0.00**	**0.74**	**0.00**	**51.08**	**3.85**	**0.19**	**6.32**	**63.17**
Other VOWH									
Botley	0.12	0.00	0.48	9.86	0.13	0.13	0.00	2.68	13.41
Faringdon	0.00	0.31	0.85	0.00	2.01	20.91	0.00	1.27	25.35
Other VOWH	0.37	2.49	4.07	2.43	1.07	6.23	0.09	0.88	17.63
Science Vale/West of Didcot	0.00	5.18	0.85	0.00	6.70	0.00	0.88	1.51	15.13
Sub-Total	**0.50**	**7.98**	**6.26**	**12.29**	**9.92**	**27.26**	**0.97**	**4.83**	**56.40**
VOWH District Total	**37.32**	**43.68**	**24.31**	**21.39**	**63.81**	**31.74**	**1.29**	**22.43**	**232.36**
Food Stores in Oxford	3.28	4.87	1.36	13.60	0.07	0.13	0.00	n/a	23.31
Food Stores in Didcot	0.58	2.28	0.43	0.00	4.36	0.00	1.58	n/a	9.22
Food Stores in Swindon	0.00	0.00	0.57	0.00	0.40	8.36	0.00	n/a	9.33
Other	0.37	0.98	1.76	1.27	1.07	1.59	0.06	n/a	7.11
Other Sub-Total	**4.24**	**8.13**	**4.12**	**14.87**	**5.90**	**10.08**	**1.64**		**48.98**
TOTAL	**41.56**	**51.81**	**28.43**	**36.26**	**69.71**	**41.81**	**2.93**		**281.34**

Source: Table 3 and 6

Table 8: Convenience Goods Expenditure 2021 (£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
Expenditure 2021	**49.73**	**61.40**	**33.53**	**42.29**	**78.45**	**50.26**	**10.52**		
Abingdon									
Waitrose	10.29	18.67	4.53	4.82	0.24	0.15	0.16	4.32	43.17
Tesco Extra	19.64	13.94	12.64	4.95	3.06	0.60	0.32	6.13	61.27
Other Abingdon Shops	12.93	9.70	3.25	0.85	0.00	0.00	0.00	2.97	29.70
Sub-Total	**42.86**	**42.31**	**20.42**	**10.61**	**3.29**	**0.75**	**0.47**	**13.41**	**134.14**
Wantage									
Sainsbury's	0.85	0.00	0.87	0.00	28.24	2.86	0.24	3.67	36.74
Waitrose	0.00	0.00	0.00	0.00	19.06	1.46	0.43	2.33	23.28
Other Wantage/Grove	0.35	0.00	0.00	0.00	12.47	0.30	0.00	1.46	14.58
Sub-Total	**1.19**	**0.00**	**0.87**	**0.00**	**59.78**	**4.62**	**0.67**	**7.46**	**74.60**
Other VOWH									
Botley	0.15	0.00	0.57	11.50	0.16	0.15	0.00	3.13	15.66
Faringdon	0.00	0.37	1.01	0.00	2.35	25.13	0.00	1.52	30.38
Other VOWH	0.45	2.95	4.79	2.83	1.26	7.49	0.34	1.06	21.16
Science Vale/West of Didcot	0.00	6.14	1.01	0.00	7.84	0.00	3.15	2.02	20.16
Sub-Total	**0.60**	**9.46**	**7.38**	**14.34**	**11.61**	**32.77**	**3.49**	**5.71**	**67.20**
VOWH District Total	**44.66**	**51.76**	**28.66**	**24.95**	**74.68**	**38.15**	**4.64**	**26.58**	**275.93**
Food Stores in Oxford	3.93	5.77	1.61	15.86	0.08	0.15	0.00	n/a	27.40
Food Stores in Didcot	0.70	2.70	0.50	0.00	5.10	0.00	5.66	n/a	14.66
Food Stores in Swindon	0.00	0.00	0.67	0.00	0.47	10.05	0.00	n/a	11.19
Other	0.45	1.17	2.08	1.48	1.26	1.91	0.22	n/a	8.56
Other Sub-Total	**5.07**	**9.64**	**4.86**	**17.34**	**6.90**	**12.11**	**5.88**		**61.81**
TOTAL	**49.73**	**61.40**	**33.53**	**42.29**	**81.58**	**50.26**	**10.52**		**337.74**

Source: Table 3 and 6

Table 9: Convenience 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
Expenditure 2026	**54.69**	**66.93**	**36.37**	**45.40**	**84.49**	**55.50**	**18.66**		
Abingdon									
Waitrose	11.32	20.35	4.91	5.18	0.25	0.17	0.28	4.72	47.17
Tesco Extra	21.60	15.19	13.71	5.31	3.30	0.67	0.56	6.70	67.04
Other Abingdon Shops	14.22	10.58	3.53	0.91	0.00	0.00	0.00	3.25	32.48
Sub-Total	**47.14**	**46.12**	**22.15**	**11.39**	**3.55**	**0.83**	**0.84**	**14.67**	**146.69**
Wantage									
Sainsbury's	0.93	0.00	0.95	0.00	30.42	3.16	0.43	3.99	39.87
Waitrose	0.00	0.00	0.00	0.00	20.53	1.61	0.77	2.55	25.45
Other Wantage/Grove	0.38	0.00	0.00	0.00	13.43	0.33	0.00	1.57	15.72
Sub-Total	**1.31**	**0.00**	**0.95**	**0.00**	**64.38**	**5.11**	**1.19**	**8.10**	**81.05**
Other VOWH									
Botley	0.16	0.00	0.62	12.35	0.17	0.17	0.00	3.37	16.83
Faringdon	0.00	0.40	1.09	0.00	2.53	27.75	0.00	1.67	33.45
Other VOWH	0.49	3.21	5.20	3.04	1.35	8.27	0.60	1.17	23.33
Science Vale/West of Didcot	0.00	6.69	1.09	0.00	8.45	0.00	5.60	2.43	24.26
Sub-Total	**0.66**	**10.31**	**8.00**	**15.39**	**12.51**	**36.19**	**6.20**	**6.21**	**73.62**
VOWH District Total	**49.11**	**56.42**	**31.10**	**26.78**	**80.44**	**42.13**	**8.23**	**28.98**	**301.36**
Food Stores in Oxford	4.32	6.29	1.75	17.02	0.08	0.17	0.00	n/a	29.63
Food Stores in Didcot	0.77	2.94	0.55	0.00	5.49	0.00	10.04	n/a	19.79
Food Stores in Swindon	0.00	0.00	0.73	0.00	0.51	11.10	0.00	n/a	12.34
Other	0.49	1.27	2.26	1.59	1.35	2.11	0.39	n/a	9.46
Other Sub-Total	**5.58**	**10.51**	**5.27**	**18.61**	**7.44**	**13.38**	**10.43**		**71.22**
TOTAL	**54.69**	**66.93**	**36.37**	**45.40**	**87.87**	**55.50**	**18.66**		**372.58**

Source: Table 3 and 6

Table 10: Convenience 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
Expenditure 2031	**57.67**	**69.93**	**37.81**	**46.67**	**87.17**	**58.78**	**27.38**		
Abingdon									
Waitrose	11.94	21.26	5.10	5.32	0.26	0.18	0.41	4.94	49.41
Tesco Extra	22.78	15.87	14.26	5.46	3.40	0.71	0.82	7.03	70.33
Other Abingdon Shops	14.99	11.05	3.67	0.93	0.00	0.00	0.00	3.40	34.05
Sub-Total	**49.71**	**48.18**	**23.03**	**11.71**	**3.66**	**0.88**	**1.23**	**15.38**	**153.79**
Wantage									
Sainsbury's	0.98	0.00	0.98	0.00	31.38	3.35	0.63	4.15	41.47
Waitrose	0.00	0.00	0.00	0.00	21.18	1.70	1.12	2.67	26.68
Other Wantage/Grove	0.40	0.00	0.00	0.00	13.86	0.35	0.00	1.62	16.24
Sub-Total	**1.38**	**0.00**	**0.98**	**0.00**	**66.43**	**5.41**	**1.75**	**8.44**	**84.39**
Other VOWH									
Botley	0.17	0.00	0.64	12.69	0.17	0.18	0.00	3.47	17.33
Faringdon	0.00	0.42	1.13	0.00	2.62	29.39	0.00	1.77	35.33
Other VOWH	0.52	3.36	5.41	3.13	1.39	8.76	0.88	1.23	24.67
Science Vale/West of Didcot	0.00	6.99	1.13	0.00	8.72	0.00	8.21	2.78	27.84
Sub-Total	**0.69**	**10.77**	**8.32**	**15.82**	**12.90**	**38.32**	**9.09**	**6.46**	**77.32**
VOWH District Total	**51.79**	**58.95**	**32.33**	**27.53**	**82.99**	**44.61**	**12.07**	**30.28**	**315.51**
Food Stores in Oxford	4.56	6.57	1.82	17.50	0.09	0.18	0.00	n/a	30.71
Food Stores in Didcot	0.81	3.08	0.57	0.00	5.67	0.00	14.73	n/a	24.85
Food Stores in Swindon	0.00	0.00	0.76	0.00	0.52	11.76	0.00	n/a	13.04
Other	0.52	1.33	2.34	1.63	1.39	2.23	0.57	n/a	10.03
Other Sub-Total	**5.88**	**10.98**	**5.48**	**19.13**	**7.67**	**14.17**	**15.31**		**78.62**
TOTAL	**57.67**	**69.93**	**37.81**	**46.67**	**90.66**	**58.78**	**27.38**		**394.13**

Source: Table 3 and 6

Table 11: Convenience Goods Floorspace and Benchmark Turnover 2014

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Abingdon					
Waitrose	2,466	85%	2,096	£11,865	£24.87
Co-op, Bury Street	613	90%	552	£7,661	£4.23
Co-op, West St Helen Street	300	95%	285	£7,661	£2.18
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	£11,080	£41.98
Tesco Express, Wootton Road	139	95%	132	£11,080	£1.46
Tesco Express, Oxford Road	150	95%	143	£11,080	£1.58
Other Abingdon town centre shops	700	100%	700	£5,000	£3.50
Total	**12,000**		**8,379**		**£84.58**
Wantage					
Sainsbury's	2,870	80%	2,296	£13,619	£31.27
Waitrose	1,050	90%	945	£11,865	£11.21
Tesco Express, Grove	336	90%	302	£11,080	£3.35
Co-op, Grove	100	95%	95	£7,661	£0.73
Other Grove	280	100%	280	£5,000	£1.40
Other Wantage	700	100%	700	£5,000	£3.50
Total	**5,336**		**4,618**		**£51.46**
Botley					
Co-op	1,161	80%	929	£7,661	£7.12
Iceland	317	95%	301	£7,295	£2.20
Tesco Express	250	95%	238	£11,080	£2.63
Other Botley	170	100%	170	£5,000	£0.85
Total	**1,898**		**1,637**		**£12.79**
Faringdon					
Budgens	1,027	90%	924	£7,000	£6.47
Tesco	1,404	90%	1,264	£11,080	£14.00
Other Faringdon	250	100%	250	£5,000	£1.25
Total	**2,681**		**2,438**		**£21.72**
VOWH District Total	**21,915**		**17,073**		**£170.55**
Commitments/Proposals					
Botley, Westway - supermarket	4,831	60%	2,898	£13,000	£37.67
Botley, Westway - other convenience	526	100%	526	£5,000	£2.63
Great Western Park supermarket	1,544	80%	1,235	£13,000	£16.06
Abbey Shopping Centre SPD Food Store	4,200	65%	2,730	£13,000	£35.49
Grove Airfield Local Centre	800	100%	800	£5,000	£4.00
Total	**11,901**		**8,189**		**£95.85**

Source: Goad, IGD, Verdict and VOWH District Council

Table 12: Summary of Convenience Goods Expenditure 2014 to 2031

Centre	2014	2016	2021	2026	2031
Available Expenditure in VOWH District (£m)					
Abingdon	111.43	112.80	134.14	146.69	153.79
Wantage/Grove	62.19	63.17	74.60	81.05	84.39
Botley	12.97	13.41	15.66	16.83	17.33
Faringdon	24.21	25.35	30.38	33.45	35.33
Other VOWH	17.69	17.63	21.16	23.33	24.67
Science Vale/West of Didcot	n/a	15.13	20.16	24.26	27.84
Total	**228.49**	**247.49**	**296.10**	**325.62**	**343.35**
Turnover of Existing Facilities (£m)					
Abingdon	84.58	84.58	84.58	84.58	84.58
Wantage/Grove	51.46	51.46	51.46	51.46	51.46
Botley	12.79	12.79	12.79	12.79	12.79
Faringdon	21.72	21.72	21.72	21.72	21.72
Other VOWH	17.69	17.69	17.69	17.69	17.69
Science Vale/West of Didcot	n/a	n/a	n/a	n/a	n/a
Total	**188.25**	**188.25**	**188.25**	**188.25**	**188.25**
Surplus/Deficit Expenditure (£m)					
Abingdon	26.85	28.21	49.56	62.11	69.21
Wantage/Grove	10.74	11.71	23.14	29.59	32.94
Botley	0.18	0.62	2.87	4.04	4.53
Faringdon	2.48	3.63	8.65	11.73	13.60
Other VOWH	0.00	-0.06	3.47	5.64	6.98
Science Vale/West of Didcot	n/a	15.13	20.16	24.26	27.84
Total	**40.25**	**59.24**	**107.85**	**137.37**	**155.10**

Table 13: Convenience Goods Floorspace Capacity 2014 to 2031

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Abingdon	2,065	2,170	3,812	4,778	5,324
Wantage/Grove	826	901	1,780	2,276	2,534
Botley	14	48	221	311	349
Faringdon	191	279	666	902	1,047
Other VOWH	n/a	-4	267	434	537
Science Vale/West of Didcot	n/a	1,164	1,551	1,866	2,142
Total	**3,096**	**4,557**	**8,296**	**10,567**	**11,931**
Floorspace Requirement (sq.m gross)					
Abingdon	2,950	3,100	5,446	6,825	7,605
Wantage/Grove	1,180	1,287	2,543	3,252	3,619
Botley	20	68	315	444	498
Faringdon	273	399	951	1,289	1,495
Other VOWH	n/a	-6	381	620	767
Science Vale/West of Didcot	n/a	1,663	2,216	2,666	3,060
Total	**4,423**	**6,510**	**11,852**	**15,096**	**17,044**

Table A: 2021 Adjusted 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%	68.0%	54.9%	21.0%	5.1%	1.7%	4.0%	10.0%
Wantage/Grove	2.1%	0.0%	2.1%	0.0%	71.5%	9.0%	5.9%	10.0%
Botley	2.0%	5.0%	10.0%	40.0%	2.0%	2.0%	2.0%	40.0%
Faringdon	0.0%	0.6%	2.7%	0.0%	2.0%	48.5%	0.0%	5.0%
Other VOWH	0.9%	3.0%	14.0%	6.6%	1.6%	14.9%	2.2%	5.0%
Science Vale/West of Didcot	0.0%	10.0%	3.0%	0.0%	10.0%	0.0%	30.0%	10.0%
VOWH District Total	**91.8%**	**86.6%**	**86.7%**	**67.6%**	**92.2%**	**76.1%**	**44.1%**	
Food Stores in Oxford	6.5%	7.5%	3.9%	29.3%	0.1%	0.3%	0.0%	n/a
Food Stores in Didcot	1.0%	4.4%	1.5%	0.0%	6.5%	0.0%	53.8%	n/a
Food Stores in Swindon	0.0%	0.0%	2.0%	0.0%	0.6%	19.8%	0.0%	n/a
Other	0.7%	1.5%	5.9%	3.1%	0.6%	3.8%	2.1%	n/a
Other Sub-Total	**8.2%**	**13.4%**	**13.3%**	**32.4%**	**7.8%**	**23.9%**	**55.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table B: Summary of Convenience Goods Expenditure 2014 to 2031 – Adjusted Market Shares and Commitments/Proposals included from 2021

Centre	2014	2016	2021	2026	2031
Available Expenditure in VOWH District (£m)					
Abingdon	111.43	112.80	130.53	142.76	149.68
Wantage/Grove	62.19	63.17	69.98	76.02	79.16
Botley	12.97	13.41	45.19	49.02	50.94
Faringdon	24.21	25.35	28.65	31.57	33.36
Other VOWH	17.69	17.63	19.74	21.71	22.89
Science Vale/West of Didcot	n/a	15.13	20.16	24.26	27.84
Total	**228.49**	**247.49**	**314.25**	**345.33**	**363.87**
Turnover of Existing Facilities (£m)					
Abingdon	84.58	84.58	120.07	120.07	120.07
Wantage/Grove	51.46	51.46	55.46	55.46	55.46
Botley	12.79	12.79	53.10	53.10	53.10
Faringdon	21.72	21.72	21.72	21.72	21.72
Other VOWH	17.69	17.69	17.69	17.69	17.69
Science Vale/West of Didcot	n/a	n/a	16.06	16.06	16.06
Total	**188.25**	**188.25**	**284.10**	**284.10**	**284.10**
Surplus/Deficit Expenditure (£m)					
Abingdon	26.85	28.21	10.46	22.69	29.61
Wantage/Grove	10.74	11.71	14.52	20.57	23.70
Botley	0.18	0.62	-7.90	-4.08	-2.16
Faringdon	2.48	3.63	6.93	9.85	11.64
Other VOWH	0.00	-0.06	2.04	4.01	5.20
Science Vale/West of Didcot	n/a	15.13	4.10	8.20	11.79
Total	**40.25**	**59.24**	**30.16**	**61.24**	**79.77**

Table C: Convenience Goods Floorspace Capacity 2014 to 2031 – Adjusted Market Shares and Commitments/Proposals included from 2021

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Abingdon	2,065	2,170	805	1,745	2,277
Wantage/Grove	826	901	1,117	1,582	1,823
Botley	14	48	-608	-314	-166
Faringdon	191	279	533	758	895
Other VOWH	0	-4	157	309	400
Science Vale/West of Didcot	n/a	1,164	316	631	907
Total	**3,096**	**4,557**	**2,320**	**4,711**	**6,136**
Floorspace Requirement (sq.m gross)					
Abingdon	2,950	3,100	1,149	2,493	3,253
Wantage/Grove	1,180	1,287	1,596	2,260	2,604
Botley	20	68	-868	-449	-237
Faringdon	273	399	762	1,083	1,279
Other VOWH	0	-6	225	441	571
Science Vale/West of Didcot	n/a	1,663	451	901	1,295
Total	**4,423**	**6,510**	**3,314**	**6,729**	**8,766**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population

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
Total	**122,552**	**125,255**	**131,260**	**154,730**	**165,944**	**170,686**

Sources:

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	2,870	2,988	3,340	3,844	4,429
Zone 2: Abingdon Rural East	3,221	3,353	3,748	4,314	4,971
Zone 3: Abingdon Rural West	3,230	3,363	3,759	4,326	4,985
Zone 4: Botley	3,661	3,812	4,261	4,904	5,651
Zone 5: Wantage	3,245	3,378	3,776	4,346	5,008
Zone 6: Faringdon	3,279	3,413	3,815	4,391	5,060
Zone 7: Science Vale/West of Didcot	n/a	3,366	3,762	4,330	4,989

Sources:

Experian Local Expenditure 2012 (2012 prices)

Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015

Excludes Special Forms of Trading

Zone 7 assumes average of Zones 2 and 5

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031
Zone 1: Abingdon	59.61	64.69	84.36	103.15	121.08
Zone 2: Abingdon Rural East	78.90	85.22	110.08	133.41	155.16
Zone 3: Abingdon Rural West	44.54	48.00	61.68	74.40	86.10
Zone 4: Botley	57.70	61.84	78.61	93.82	107.36
Zone 5: Wantage	101.03	108.46	138.35	165.67	190.26
Zone 6: Faringdon	63.28	68.84	90.18	110.73	130.53
Zone 7: Science Vale/West of Didcot	n/a	4.78	18.70	36.89	60.25
Total	**405.07**	**441.82**	**581.96**	**718.07**	**850.74**

Source: Tables 1 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	% Inflow
VOWH District							
Abingdon	50.3%	44.9%	37.7%	15.8%	14.4%	5.2%	10.0%
Wantage/Grove	1.4%	0.5%	1.3%	0.1%	32.9%	8.6%	10.0%
Botley	0.0%	0.0%	0.2%	3.0%	0.0%	0.0%	5.0%
Seacourt Tower Retail Park	0.2%	0.1%	0.8%	2.7%	0.1%	0.0%	60.0%
Faringdon	0.0%	0.0%	0.2%	0.0%	0.0%	7.0%	10.0%
Other VOWH	0.8%	0.8%	1.2%	1.4%	0.4%	1.7%	5.0%
VOWH District Total	**52.7%**	**46.3%**	**41.4%**	**23.0%**	**47.8%**	**22.5%**	
Other							
Botley Retail Park	1.9%	1.0%	4.3%	8.0%	0.8%	0.2%	n/a
Oxford	29.6%	31.1%	27.4%	52.1%	17.4%	12.6%	n/a
Didcot	3.6%	7.1%	3.3%	0.0%	8.1%	0.5%	n/a
Swindon	0.5%	0.5%	5.3%	1.1%	5.2%	49.1%	n/a
Other Outside District	11.7%	14.0%	18.3%	15.8%	20.7%	15.1%	n/a
Other Sub-Total	**47.3%**	**53.7%**	**58.6%**	**77.0%**	**52.2%**	**77.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

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	Inflow	Total
Expenditure 2014	**59.61**	**78.90**	**44.54**	**57.70**	**101.03**	**63.28**		
VOWH District								
Abingdon	29.98	35.43	16.79	9.12	14.55	3.29	12.13	121.29
Wantage/Grove	0.83	0.39	0.58	0.06	33.24	5.44	4.51	45.05
Botley	0.00	0.00	0.09	1.73	0.00	0.00	0.10	1.92
Seacourt Tower Retail Park	0.12	0.08	0.36	1.56	0.10	0.00	3.32	5.53
Faringdon	0.00	0.00	0.09	0.00	0.00	4.43	0.50	5.02
Other VOWH	0.48	0.63	0.53	0.81	0.40	1.08	0.21	4.14
VOWH District Total	**31.41**	**36.53**	**18.44**	**13.27**	**48.29**	**14.24**	**20.76**	**182.95**
Other								
Botley Retail Park	1.13	0.79	1.92	4.62	0.81	0.13	n/a	9.39
Oxford	17.64	24.54	12.21	30.06	17.58	7.97	n/a	110.00
Didcot	2.15	5.60	1.47	0.00	8.18	0.32	n/a	17.72
Swindon	0.30	0.39	2.36	0.63	5.25	31.07	n/a	40.01
Other Outside District	6.97	11.05	8.15	9.12	20.91	9.56	n/a	65.76
Other Sub-Total	**28.19**	**42.37**	**26.10**	**44.43**	**52.74**	**49.04**		**242.88**
TOTAL	**59.61**	**78.90**	**44.54**	**57.70**	**101.03**	**63.28**		**425.83**

Source: Table 3 and 4

Table 6: 2016 Adjusted 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
VOWH District								
Abingdon	50.3%	39.9%	37.7%	15.8%	12.4%	5.2%	15.3%	10.0%
Wantage/Grove	1.4%	0.5%	1.3%	0.1%	29.9%	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%	7.0%	0.0%	0.0%	7.0%	0.0%	10.0%	5.0%
VOWH District Total	**52.7%**	**48.3%**	**41.4%**	**23.0%**	**49.8%**	**22.5%**	**30.5%**	
Other								
Botley Retail Park	1.9%	1.0%	4.3%	8.0%	0.8%	0.2%	0.0%	n/a
Oxford	29.6%	29.1%	27.4%	52.1%	17.4%	12.6%	13.1%	n/a
Didcot	3.6%	7.1%	3.3%	0.0%	6.1%	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
Other Sub-Total	**47.3%**	**51.7%**	**58.6%**	**77.0%**	**50.2%**	**77.5%**	**69.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table 7: 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
Expenditure 2016	**64.69**	**85.22**	**48.00**	**61.84**	**108.46**	**68.84**	**4.78**		
VOWH District									
Abingdon	32.54	34.00	18.09	9.77	13.45	3.58	0.73	12.46	124.63
Wantage/Grove	0.91	0.43	0.62	0.06	32.43	5.92	0.22	4.51	45.10
Botley	0.00	0.00	0.10	1.86	0.00	0.00	0.00	0.10	2.05
Seacourt Tower Retail Park	0.13	0.09	0.38	1.67	0.11	0.00	0.00	3.57	5.94
Faringdon	0.00	0.00	0.10	0.00	0.00	4.82	0.00	0.55	5.46
Other VOWH	0.52	0.68	0.58	0.87	0.43	1.17	0.02	0.22	4.49
Science Vale/West of Didcot	0.00	5.97	0.00	0.00	7.59	0.00	0.48	0.74	14.77
VOWH District Total	**34.09**	**41.16**	**19.87**	**14.22**	**54.01**	**15.49**	**1.46**	**22.15**	**202.46**
Other									
Botley Retail Park	1.23	0.85	2.06	4.95	0.87	0.14	0.00	n/a	10.10
Oxford	19.15	24.80	13.15	32.22	18.87	8.67	0.63	n/a	117.49
Didcot	2.33	6.05	1.58	0.00	6.62	0.34	1.39	n/a	18.31
Swindon	0.32	0.43	2.54	0.68	5.64	33.80	0.09	n/a	43.50
Other Outside District	7.57	11.93	8.78	9.77	22.45	10.39	1.22	n/a	72.12
Other Sub-Total	**30.60**	**44.06**	**28.13**	**47.62**	**54.45**	**53.35**	**3.32**	**n/a**	**261.52**
TOTAL	**64.69**	**85.22**	**48.00**	**61.84**	**108.46**	**68.84**	**4.78**		**463.97**

Source: Table 3 and 6

Table 8: Comparison Goods Expenditure 2021 (£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
Expenditure 2021	**84.36**	**110.08**	**61.68**	**78.61**	**138.35**	**90.18**	**18.70**		
VOWH District									
Abingdon	42.44	43.92	23.25	12.42	17.15	4.69	2.86	16.30	163.04
Wantage/Grove	1.18	0.55	0.80	0.08	41.37	7.76	0.88	5.85	58.46
Botley	0.00	0.00	0.12	2.36	0.00	0.00	0.00	0.13	2.61
Seacourt Tower Retail Park	0.17	0.11	0.49	2.12	0.14	0.00	0.00	4.55	7.58
Faringdon	0.00	0.00	0.12	0.00	0.00	6.31	0.00	0.72	7.15
Other VOWH	0.67	0.88	0.74	1.10	0.55	1.53	0.09	0.29	5.87
Science Vale/West of Didcot	0.00	7.71	0.00	0.00	9.68	0.00	1.87	1.01	20.27
VOWH District Total	**44.46**	**53.17**	**25.54**	**18.08**	**68.90**	**20.29**	**5.70**	**28.85**	**264.99**
Other									
Botley Retail Park	1.60	1.10	2.65	6.29	1.11	0.18	0.00	n/a	12.93
Oxford	24.97	32.03	16.90	40.95	24.07	11.36	2.45	n/a	152.75
Didcot	3.04	7.82	2.04	0.00	8.44	0.45	5.44	n/a	27.22
Swindon	0.42	0.55	3.27	0.86	7.19	44.28	0.34	n/a	56.92
Other Outside District	9.87	15.41	11.29	12.42	28.64	13.62	4.77	n/a	96.01
Other Sub-Total	**39.90**	**56.91**	**36.15**	**60.53**	**69.45**	**69.89**	**13.00**	**n/a**	**345.82**
TOTAL	**84.36**	**110.08**	**61.68**	**78.61**	**138.35**	**90.18**	**18.70**		**610.81**

Source: Table 3 and 6

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
Expenditure 2026	**103.15**	**133.41**	**74.40**	**93.82**	**165.67**	**110.73**	**36.89**		
VOWH District									
Abingdon	51.89	53.23	28.05	14.82	20.54	5.76	5.64	19.99	199.93
Wantage/Grove	1.44	0.67	0.97	0.09	49.54	9.52	1.73	7.11	71.07
Botley	0.00	0.00	0.15	2.81	0.00	0.00	0.00	0.16	3.12
Seacourt Tower Retail Park	0.21	0.13	0.60	2.53	0.17	0.00	0.00	5.45	9.08
Faringdon	0.00	0.00	0.15	0.00	0.00	7.75	0.00	0.88	8.78
Other VOWH	0.83	1.07	0.89	1.31	0.66	1.88	0.18	0.36	7.19
Science Vale/West of Didcot	0.00	9.34	0.00	0.00	11.60	0.00	3.69	1.30	25.92
VOWH District Total	**54.36**	**64.44**	**30.80**	**21.58**	**82.50**	**24.91**	**11.25**	**35.24**	**325.09**
Other									
Botley Retail Park	1.96	1.33	3.20	7.51	1.33	0.22	0.00	n/a	15.55
Oxford	30.53	38.82	20.39	48.88	28.83	13.95	4.83	n/a	186.23
Didcot	3.71	9.47	2.46	0.00	10.11	0.55	10.74	n/a	37.04
Swindon	0.52	0.67	3.94	1.03	8.61	54.37	0.66	n/a	69.80
Other Outside District	12.07	18.68	13.62	14.82	34.29	16.72	9.41	n/a	119.61
Other Sub-Total	**48.79**	**68.97**	**43.60**	**72.24**	**83.17**	**85.81**	**25.64**	**n/a**	**428.22**
TOTAL	**103.15**	**133.41**	**74.40**	**93.82**	**165.67**	**110.73**	**36.89**		**753.31**

Source: Table 3 and 6

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
Expenditure 2031	**121.08**	**155.16**	**86.10**	**107.36**	**190.26**	**130.53**	**60.25**		
VOWH District									
Abingdon	60.91	61.91	32.46	16.96	23.59	6.79	9.22	23.54	235.37
Wantage/Grove	1.70	0.78	1.12	0.11	56.89	11.23	2.83	8.29	82.94
Botley	0.00	0.00	0.17	3.22	0.00	0.00	0.00	0.18	3.57
Seacourt Tower Retail Park	0.24	0.16	0.69	2.90	0.19	0.00	0.00	6.26	10.44
Faringdon	0.00	0.00	0.17	0.00	0.00	9.14	0.00	1.03	10.34
Other VOWH	0.97	1.24	1.03	1.50	0.76	2.22	0.30	0.42	8.45
Science Vale/West of Didcot	0.00	10.86	0.00	0.00	13.32	0.00	6.02	1.59	31.79
VOWH District Total	**63.81**	**74.94**	**35.65**	**24.69**	**94.75**	**29.37**	**18.38**	**41.32**	**382.91**
Other									
Botley Retail Park	2.30	1.55	3.70	8.59	1.52	0.26	0.00	n/a	17.93
Oxford	35.84	45.15	23.59	55.93	33.11	16.45	7.89	n/a	217.96
Didcot	4.36	11.02	2.84	0.00	11.61	0.65	17.53	n/a	48.01
Swindon	0.61	0.78	4.56	1.18	9.89	64.09	1.08	n/a	82.19
Other Outside District	14.17	21.72	15.76	16.96	39.38	19.71	15.36	n/a	143.07
Other Sub-Total	**57.27**	**80.22**	**50.46**	**82.66**	**95.51**	**101.16**	**41.87**	**n/a**	**509.16**
TOTAL	**121.08**	**155.16**	**86.10**	**107.36**	**190.26**	**130.53**	**60.25**		**892.06**

Source: Table 3 and 6

Table 11: Comparison Goods Floorspace, 2014

Store	Comparison Goods Floorspace (sq.m gross)	Comparison Goods Floorspace (sq.m net)
Abingdon		
Abingdon Town Centre *	12,930	9,141
Comparison sales in food stores	n/a	3,621
Retail Warehousing	22,503	20,109
Abingdon Sub-Total	**35,433**	**32,871**
Wantage/Grove		
Wantage Town Centre	11,740	7,631
Grove	n/a	250
Comparison sales in food stores	n/a	718
Wantage/Grove Sub-Total	**11,740**	**8,599**
Botley		
Botley District Centre	n/a	480
Comparison sales in food stores	n/a	261
Homebase, Seacroft Centre	4,212	3,749
Botley Sub-Total	**4,212**	**4,490**
Faringdon		
Faringdon Town Centre	2,710	1,626
Comparison sales in food stores	n/a	243
Faringdon Sub-Total	**2,710**	**1,869**
VOWH District Total	**n/a**	**47,829**
Commitments/Proposals		
Botley, Seacourt Tower Retail Park	13,522	10,818
Botley, Westway - supermarket	n/a	1,932
Botley, Westway - other comparison	n/a	1,578
Great Western Park supermarket	n/a	309
Abbey Shopping Centre SPD Food Store	n/a	1,470
Grove Airfield Local Centre	680	500
Total	**n/a**	**16,607**

Source: Goad, IGD, Verdict and VOWH District Council

** Includes new units within the Abbey Centre*

Table 12: Summary of Comparison Goods Expenditure 2014 to 2031

Centre	2014	2016	2021	2026	2031
Available Expenditure in VOWH District (£m)					
Abingdon	121.29	124.63	163.04	199.93	235.37
Wantage/Grove	45.05	45.10	58.46	71.07	82.94
Botley (incl. Seacourt Tower Retail Park)	7.45	8.00	10.19	12.20	14.01
Faringdon	5.02	5.46	7.15	8.78	10.34
Other VOWH	4.14	4.49	5.87	7.19	8.45
Science Vale/West of Didcot	n/a	14.77	20.27	25.92	31.79
Total	**182.95**	**202.46**	**264.99**	**325.09**	**382.91**
Turnover of Existing Facilities (£m)					
Abingdon	121.29	126.19	139.32	153.82	169.83
Wantage/Grove	45.05	46.87	51.75	57.14	63.09
Botley (incl. Seacourt Tower Retail Park)	7.45	7.75	8.56	9.45	10.43
Faringdon	5.02	5.22	5.77	6.37	7.03
Other VOWH	4.14	4.30	4.75	5.25	5.79
Science Vale/West of Didcot	n/a	n/a	n/a	n/a	n/a
Total	**182.95**	**190.34**	**210.15**	**232.02**	**256.17**
Surplus/Deficit Expenditure (£m)					
Abingdon	n/a	-1.56	23.72	46.11	65.54
Wantage/Grove	n/a	-1.77	6.71	13.93	19.85
Botley (incl. Seacourt Tower Retail Park)	n/a	0.25	1.64	2.76	3.58
Faringdon	n/a	0.24	1.38	2.41	3.31
Other VOWH	n/a	0.19	1.12	1.94	2.66
Science Vale/West of Didcot	n/a	14.77	20.27	25.92	31.79
Total	**n/a**	**12.12**	**54.84**	**93.07**	**126.74**

Table 13: Comparison Goods Floorspace Capacity 2014 to 2031

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,202	£5,743	£6,341	£7,001
Floorspace Requirement (sq.m net)					
Abingdon	n/a	-299	4,130	7,271	9,362
Wantage/Grove	n/a	-341	1,168	2,197	2,836
Botley (incl. Seacourt Tower Retail Park)	n/a	47	285	435	511
Faringdon	n/a	46	241	380	473
Other VOWH	n/a	36	195	306	379
Science Vale/West of Didcot	n/a	2,840	3,530	4,088	4,541
Total	**n/a**	**2,330**	**9,548**	**14,676**	**18,102**
Floorspace Requirement (sq.m gross)					
Abingdon	n/a	-399	5,507	9,695	12,482
Wantage/Grove	n/a	-454	1,557	2,930	3,781
Botley (incl. Seacourt Tower Retail Park)	n/a	63	380	579	681
Faringdon	n/a	61	321	507	631
Other VOWH	n/a	49	259	408	506
Science Vale/West of Didcot	n/a	3,787	4,706	5,450	6,055
Total	**n/a**	**3,106**	**12,731**	**19,568**	**24,136**

Table A: 2021 Adjusted 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
VOWH District								
Abingdon	47.9%	38.5%	33.0%	10.8%	12.3%	5.2%	15.3%	10.0%
Wantage/Grove	1.4%	0.5%	1.3%	0.1%	29.9%	8.6%	4.7%	10.0%
Botley	0.5%	0.5%	4.0%	15.0%	0.0%	0.0%	0.0%	25.0%
Seacourt Tower Retail Park	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%	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%	7.0%	0.0%	0.0%	7.0%	0.0%	10.0%	5.0%
VOWH District Total	**53.1%**	**48.3%**	**44.7%**	**37.3%**	**50.1%**	**22.6%**	**30.5%**	
Other								
Botley Retail Park	1.5%	1.0%	3.3%	5.0%	0.5%	0.1%	0.0%	n/a
Oxford	29.6%	29.1%	25.1%	42.8%	17.4%	12.6%	13.1%	n/a
Didcot	3.6%	7.1%	3.3%	0.0%	6.1%	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%	13.8%	20.7%	15.1%	25.5%	n/a
Other Sub-Total	**46.9%**	**51.7%**	**55.3%**	**62.7%**	**49.9%**	**77.4%**	**69.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey September 2012 with NLP adjustments

Table B: Summary of Comparison Goods Expenditure 2014 to 2031 – Adjusted Market Shares from 2021

Centre	2014	2016	2021	2026	2031
Available Expenditure in VOWH District (£m)					
Abingdon	121.29	124.63	151.34	185.82	219.06
Wantage/Grove	45.05	45.10	58.46	71.07	82.94
Botley	1.92	2.05	20.31	24.31	27.91
Seacourt Tower Retail Park	5.53	5.94	37.34	44.88	51.75
Faringdon	5.02	5.46	7.15	8.78	10.34
Other VOWH	4.14	4.49	5.87	7.19	8.45
Science Vale/West of Didcot	n/a	14.77	20.27	25.92	31.79
Total	**182.95**	**202.46**	**300.74**	**367.97**	**432.24**
Turnover of Existing Facilities (£m)					
Abingdon	121.29	126.19	139.32	153.82	169.83
Wantage/Grove	45.05	46.87	51.75	57.14	63.09
Botley	1.92	1.99	2.20	2.43	2.68
Seacourt Tower Retail Park	5.53	5.76	6.36	7.02	7.75
Faringdon	5.02	5.22	5.77	6.37	7.03
Other VOWH	4.14	4.30	4.75	5.25	5.79
Science Vale/West of Didcot	n/a	n/a	n/a	n/a	n/a
Total	**182.95**	**190.34**	**210.15**	**232.02**	**256.17**
Surplus/Deficit Expenditure (£m)					
Abingdon	n/a	-1.56	12.02	32.00	49.23
Wantage/Grove	n/a	-1.77	6.71	13.93	19.85
Botley	n/a	0.06	18.11	21.88	25.22
Seacourt Tower Retail Park	n/a	0.18	30.99	37.87	44.00
Faringdon	n/a	0.24	1.38	2.41	3.31
Other VOWH	n/a	0.19	1.12	1.94	2.66
Science Vale/West of Didcot	n/a	14.77	20.27	25.92	31.79
Total	**n/a**	**12.12**	**90.59**	**135.95**	**176.07**

Table C: Comparison Goods Floorspace Capacity 2014 to 2031 – Adjusted Market Shares from 2021

Centre	2014	2016	2021	2026	2031
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,202	£5,743	£6,341	£7,001
Turnover Density for Seacourt Tower Retail Park (£ per sq.m)	£4,000	£4,162	£4,595	£5,073	£5,601
Floorspace Requirement (sq.m net)					
Abingdon	n/a	-299	2,092	5,046	7,031
Wantage/Grove	n/a	-341	1,168	2,197	2,836
Botley	n/a	12	3,153	3,450	3,603
Seacourt Tower Retail Park	n/a	44	6,744	7,464	7,857
Faringdon	n/a	46	241	380	473
Other VOWH	n/a	36	195	306	379
Science Vale/West of Didcot	n/a	2,840	3,530	4,088	4,541
Total	**n/a**	**2,338**	**17,121**	**22,932**	**26,720**
Floorspace Requirement (sq.m gross)					
Abingdon	n/a	-399	2,790	6,728	9,375
Wantage/Grove	n/a	-454	1,557	2,930	3,781
Botley	n/a	16	4,203	4,600	4,803
Seacourt Tower Retail Park *	n/a	55	8,430	9,330	9,821
Faringdon	n/a	61	321	507	631
Other VOWH	n/a	49	259	408	506
Science Vale/West of Didcot	n/a	3,787	4,706	5,450	6,055
Total	**n/a**	**3,114**	**22,267**	**29,953**	**34,972**
Retail Commitments (sq.m net)					
Abingdon	n/a	0	1,470	1,470	1,470
Wantage/Grove	n/a	0	500	500	500
Botley	n/a	0	3,510	3,510	3,510
Seacourt Tower Retail Park	n/a	0	10,818	10,818	10,818
Faringdon	n/a	0	0	0	0
Other VOWH	n/a	0	0	0	0
Science Vale/West of Didcot	n/a	0	309	309	309
Total	**n/a**	**0**	**16,607**	**16,607**	**16,607**
Residual Floorspace Requirement (sq.m net)					
Abingdon	n/a	-299	622	3,576	5,561
Wantage/Grove	n/a	-341	668	1,697	2,336
Botley	n/a	12	-357	-60	93
Seacourt Tower Retail Park	n/a	44	-4,074	-3,354	-2,961
Faringdon	n/a	46	241	380	473
Other VOWH	n/a	36	195	306	379
Science Vale/West of Didcot	n/a	2,840	3,221	3,779	4,232
Total	**n/a**	**2,338**	**514**	**6,325**	**10,113**
Residual Floorspace Requirement (sq.m gross)					
Abingdon	n/a	-399	830	4,768	7,415
Wantage/Grove	n/a	-454	890	2,263	3,114
Botley	n/a	16	-477	-80	123
Seacourt Tower Retail Park *	n/a	55	-5,093	-4,192	-3,702
Faringdon	n/a	61	321	507	631
Other VOWH	n/a	49	259	408	506
Science Vale/West of Didcot	n/a	3,787	4,294	5,038	5,643
Total	**n/a**	**3,114**	**1,025**	**8,712**	**13,731**

** Assumed 80% net sales area for Seacourt Tower Retail Park*

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