Nathaniel Lichfield & Partners
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Retail and Town Centre Study

Appendices

Vale of White Horse District

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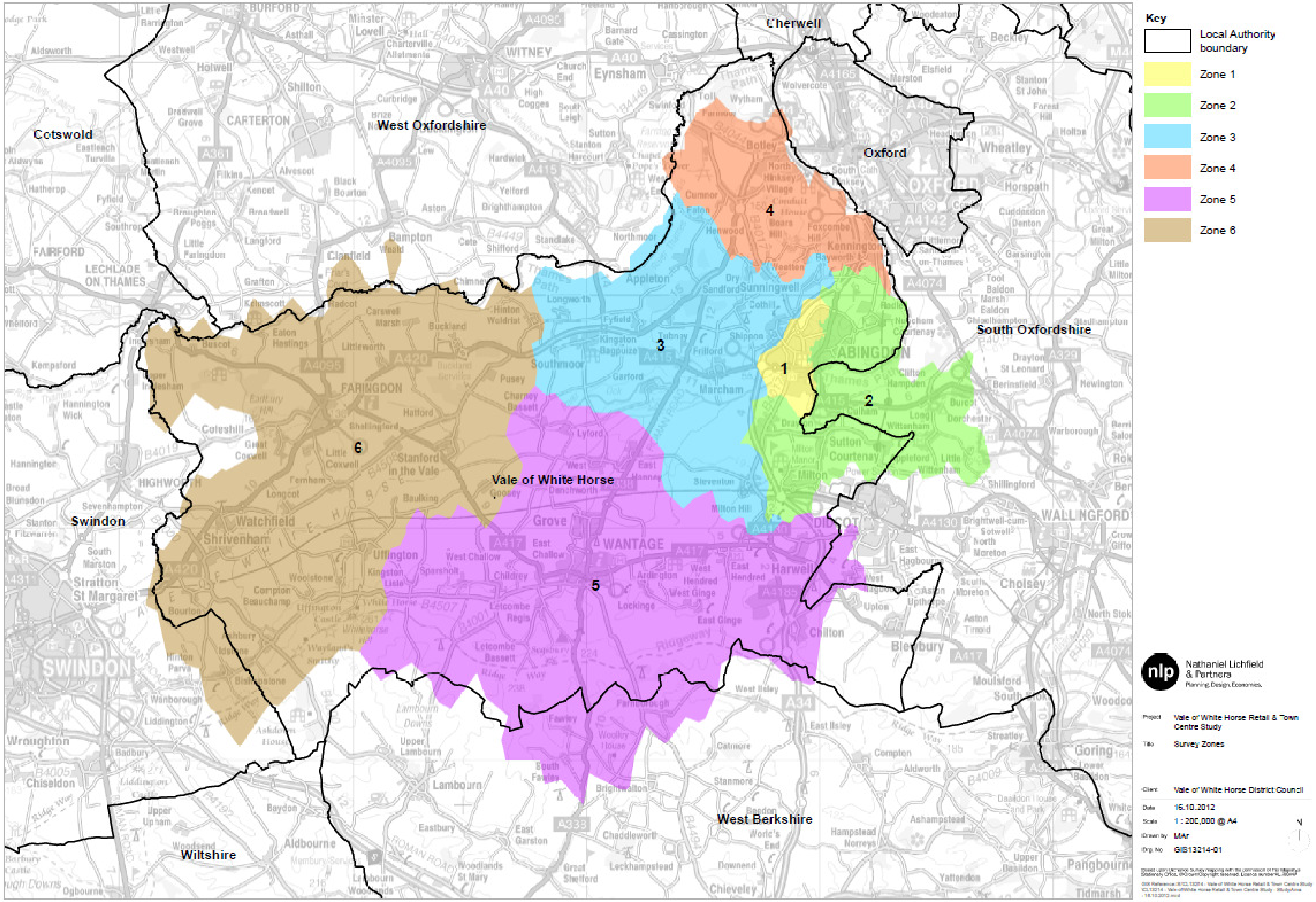
Appendices

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

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1.1 All monetary values expressed in this study are at 2011 prices, consistent with Experian's base year expenditure figures for 2011 (Retail Planner Briefing Note 10) which is the most up to date information available.

Study Area

1.2 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.

Retail Expenditure

1.3 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 2011 have been obtained.

1.4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 10, September 2012) 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.

1.5 Experian's EBS growth forecast rates for 2011 to 2014 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 0.1% for 2011-2012, -0.1% for 2012-2013 and 0% for 2013 to 2014; for comparison goods: 1.4% for 2011-2012, 1.8% for 2012-2013 and 2.4% for 2013-2014).

1.6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.6% per annum for convenience goods up to 2019 and 0.8% per annum after 2019, 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.

1.7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2011 is:

- 6.1% of convenience goods expenditure; and
- 11.9% of comparison goods expenditure.

1.8 Experian predicts that these figures will increase in the future, up to 20% by the end of the 2020s. 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 2011 are:

- 1.8% of convenience goods expenditure; and
- 8.9% of comparison goods expenditure.

1.9 The projections provided by Experian suggest that these percentages could increase to 3.1% and 13.6% by 2017, and estimated at 4.5% and 16.0% by 2027. These figures have been adopted in this assessment.

1.10 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.

1.11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17.

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

Market Shares/Penetration Rates

1.13 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.

1.14 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 2011) and Mintel (Retail Rankings 2010) 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

1.15 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.

1.16 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.

1.17 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 is £166.10 million (Table 4A, Appendix 2).

1.18 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 £5,500 per sq m.

Appendix 2 Convenience Assessment

Table 1A: Population Projections

Zone Area	2001	2011	2012	2016	2019	2024	2029
Zone 1: Abingdon	19,199	20,091	20,047	19,871	20,434	21,234	21,946
Zone 2: Abingdon Rural East	22,843	23,904	23,914	23,954	24,633	25,597	26,455
Zone 3: Abingdon Rural West	12,938	13,539	13,545	13,569	13,954	14,500	14,986
Zone 4: Botley	14,609	15,288	15,472	16,208	16,667	17,319	17,900
Zone 5: Wantage	29,698	31,078	32,092	36,148	37,172	38,627	39,922
Zone 6: Faringdon	17,875	18,706	18,894	19,646	20,202	20,993	21,697
Total	**117,162**	**122,606**	**123,964**	**129,396**	**133,062**	**138,271**	**142,905**

Sources:

Experian 2001 small area population and 2011 Census of population.
Oxfordshire County Council ward level population projections 2011 to 2016
Oxfordshire County Council district population projections 2016 to 2026
OCC based growth rate projection (0.935% per annum - 2016 to 2021)
OCC based growth rate projection (0.661% per annum - 2021 to 2029)

Table 2A: Convenience Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2012	2016	2019	2024	2029
Zone 1: Abingdon	£1,825	£1,828	£1,847	£1,909	£1,978
Zone 2: Abingdon Rural East	£1,890	£1,894	£1,914	£1,977	£2,049
Zone 3: Abingdon Rural West	£1,953	£1,957	£1,978	£2,043	£2,117
Zone 4: Botley	£1,983	£1,986	£2,007	£2,074	£2,149
Zone 5: Wantage	£1,905	£1,908	£1,929	£1,993	£2,065
Zone 6: Faringdon	£2,034	£2,037	£2,059	£2,127	£2,204

Sources:
Experian local estimates for 2011 convenience goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates

Table 3A: Total Available Convenience Goods Expenditure (£M - 2011 Prices)

Zone	2012	2016	2019	2024	2029	Growth 2012-2019	Growth 2012-2024	Growth 2012-2029
Zone 1: Abingdon	£36.58	£36.32	£37.75	£40.53	£43.41	3.2%	10.8%	18.7%
Zone 2: Abingdon Rural East	£45.21	£45.36	£47.15	£50.62	£54.21	4.3%	12.0%	19.9%
Zone 3: Abingdon Rural West	£26.46	£26.55	£27.59	£29.62	£31.73	4.3%	12.0%	19.9%
Zone 4: Botley	£30.67	£32.19	£33.46	£35.92	£38.47	9.1%	17.1%	25.4%
Zone 5: Wantage	£61.14	£68.98	£71.70	£76.97	£82.44	17.3%	25.9%	34.8%
Zone 6: Faringdon	£38.42	£40.02	£41.60	£44.66	£47.83	8.3%	16.2%	24.5%
Total	**£238.47**	**£249.42**	**£259.25**	**£278.31**	**£298.08**	**8.7%**	**16.7%**	**25.0%**

Sources: Table 1A and Table 2A

Table 4A: Convenience Floorspace and Benchmark Turnover

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience Sales sq.m net	Turnover Density £ per sq.m net	Total Turnover £Million
Abingdon					
Waitrose	2,466	85%	2,096	£12,209	£25.59
Co-op, Bury Street	613	90%	552	£7,745	£4.27
Co-op, West St Helen Street	300	95%	285	£7,745	£2.21
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	£13,228	£50.11
Tesco Express, Wootton Road	139	95%	132	£13,228	£1.75
Tesco Express, Oxford Road	150	95%	143	£13,228	£1.88
Other Abingdon town centre shops	700	100%	700	£5,000	£3.50
Total	**12,000**		**8,379**		**£94.10**
Wantage					
Sainsbury's	2,870	80%	2,296	£13,405	£30.78
Waitrose (extended)	1,050	90%	945	£12,209	£11.54
Tesco Express, Grove	336	90%	302	£13,228	£4.00
Co-op, Grove	100	95%	95	£7,745	£0.74
Other Grove	280	100%	280	£5,000	£1.40
Other Wantage	700	100%	700	£5,000	£3.50
Total	**5,336**		**4,618**		**£51.95**
Botley					
Co-op	1,161	80%	929	£7,745	£7.19
Iceland	317	95%	301	£7,126	£2.15
Tesco Express	250	95%	238	£13,228	£3.14
Other Botley	170	100%	170	£5,000	£0.85
Total	**1,898**		**1,637**		**£13.33**
Faringdon					
Budgens	1,027	90%	924	£7,000	£6.47
Other Faringdon	250	100%	250	£5,000	£1.25
Total	**1,277**		**1,174**		**£7.72**
GRAND TOTAL	**20,511**		**15,809**	**£10,570**	**£167.10**
Commitments					
Tesco, Faringdon (commitment)	1,404	90%	1,260	£13,228	£16.67
Proposals					
Botley food store	5,000	60%	3,000	£13,000	£39.00
Abbey Shopping Centre SPD Food Store	4,000	65%	2,600	£13,000	£33.80
Grove Airfield Local Centre*	800	100%	800	£5,000	£4.00

Sources: Goad Plans, IGD and VOWH District Centre

* assumes a third of proposed retail space (3,400 sq m gross) is convenience goods

Table 5A: Convenience Shopping Penetration Rates 2012

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Abingdon							
Waitrose	20.7%	32.4%	13.8%	11.4%	0.3%	0.5%	10.0%
Tesco Extra	39.5%	24.7%	39.2%	11.7%	4.1%	2.6%	10.0%
Other Abingdon Shops	26.0%	17.8%	9.8%	2.0%	0.0%	0.0%	10.0%
Sub-Total	**86.2%**	**74.9%**	**62.8%**	**25.1%**	**4.4%**	**3.1%**	
Wantage							
Sainsbury's	1.7%	0.0%	2.7%	0.0%	39.6%	10.6%	10.0%
Waitrose	0.0%	0.0%	0.0%	0.0%	25.1%	4.5%	10.0%
Other Wantage/Grove	0.7%	0.0%	0.0%	0.0%	16.2%	0.6%	10.0%
Sub-Total	**2.4%**	**0.0%**	**2.7%**	**0.0%**	**80.9%**	**15.7%**	
Other VOWH							
Botley	0.3%	0.0%	1.7%	27.2%	0.2%	0.3%	20.0%
Faringdon	0.0%	0.6%	0.4%	0.0%	0.0%	22.3%	5.0%
Village shops	0.9%	4.8%	17.6%	6.7%	1.6%	17.2%	5.0%
Sub-Total	**1.2%**	**5.4%**	**19.7%**	**33.9%**	**1.8%**	**39.8%**	
District Total	**89.8%**	**80.3%**	**85.2%**	**59.0%**	**87.1%**	**58.6%**	
Oxford	7.9%	9.4%	4.8%	37.5%	0.1%	0.3%	n/a
Didcot	1.4%	8.4%	1.5%	0.0%	10.6%	0.0%	n/a
Swindon	0.0%	0.0%	2.1%	0.0%	0.6%	35.9%	n/a
Other	0.9%	1.9%	6.4%	3.5%	1.6%	5.2%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012

Table 6A: Convenience Expenditure 2012 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2012	**£36.58**	**£45.21**	**£26.46**	**£30.67**	**£61.14**	**£38.42**		**£238.47**
Abingdon								
Waitrose	£7.57	£14.65	£3.65	£3.50	£0.18	£0.19	£3.30	£33.05
Tesco Extra	£14.45	£11.17	£10.37	£3.59	£2.51	£1.00	£4.79	£47.87
Other Abingdon Shops	£9.51	£8.05	£2.59	£0.61	£0.00	£0.00	£2.31	£23.07
Sub-Total	**£31.53**	**£33.86**	**£16.61**	**£7.70**	**£2.69**	**£1.19**	**£10.40**	**£103.98**
Wantage								
Sainsbury's	£0.62	£0.00	£0.71	£0.00	£24.21	£4.07	£3.29	£32.91
Waitrose	£0.00	£0.00	£0.00	£0.00	£15.35	£1.73	£1.90	£18.97
Other Wantage/Grove	£0.26	£0.00	£0.00	£0.00	£9.90	£0.23	£1.15	£11.55
Sub-Total	**£0.88**	**£0.00**	**£0.71**	**£0.00**	**£49.46**	**£6.03**	**£6.34**	**£63.43**
Other VOWH								
Botley	£0.11	£0.00	£0.45	£8.34	£0.12	£0.12	£2.29	£11.43
Faringdon	£0.00	£0.27	£0.11	£0.00	£0.00	£8.57	£0.47	£9.42
Village shops	£0.33	£2.17	£4.66	£2.06	£0.98	£6.61	£0.88	£17.68
Sub-Total	**£0.44**	**£2.44**	**£5.21**	**£10.40**	**£1.10**	**£15.29**	**£3.64**	**£38.52**
District Total	**£32.85**	**£36.30**	**£22.54**	**£18.10**	**£53.25**	**£22.52**	**£20.38**	**£205.93**
Oxford	£2.89	£4.25	£1.27	£11.50	£0.06	£0.12	n/a	£20.09
Didcot	£0.51	£3.80	£0.40	£0.00	£6.48	£0.00	n/a	£11.19
Swindon	£0.00	£0.00	£0.56	£0.00	£0.37	£13.79	n/a	£14.72
Other	£0.33	£0.86	£1.69	£1.07	£0.98	£2.00	n/a	£6.93
Other Total	**£3.73**	**£8.91**	**£3.92**	**£12.58**	**£7.89**	**£15.91**	**n/a**	**£52.92**
Total	**£36.58**	**£45.21**	**£26.46**	**£30.67**	**£61.14**	**£38.42**	**n/a**	**£258.85**

Table 7A: Convenience Shopping Penetration Rates 2016 (with Faringdon commitment)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	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%
Village shops	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%**	
District Total	**89.8%**	**80.3%**	**85.5%**	**59.0%**	**87.2%**	**75.9%**	
Oxford	7.9%	9.4%	4.8%	37.5%	0.1%	0.3%	n/a
Didcot	1.4%	8.4%	1.5%	0.0%	10.5%	0.0%	n/a
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
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012 and NLP adjustments

Table 8A: Convenience Expenditure 2016 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2016	**£36.32**	**£45.36**	**£26.55**	**£32.19**	**£68.98**	**£40.02**		**£249.42**
Abingdon								
Waitrose	£7.52	£14.70	£3.66	£3.67	£0.21	£0.20	£3.33	£33.28
Tesco Extra	£14.35	£11.20	£10.41	£3.77	£2.83	£1.04	£4.84	£48.44
Other Abingdon Shops	£9.44	£8.07	£2.60	£0.64	£0.00	£0.00	£2.31	£23.07
Sub-Total	**£31.31**	**£33.98**	**£16.67**	**£8.08**	**£3.04**	**£1.24**	**£10.48**	**£104.79**
Wantage								
Sainsbury's	£0.62	£0.00	£0.69	£0.00	£26.21	£2.28	£3.31	£33.11
Waitrose	£0.00	£0.00	£0.00	£0.00	£16.76	£1.16	£1.99	£19.92
Other Wantage/Grove	£0.25	£0.00	£0.00	£0.00	£10.97	£0.24	£1.27	£12.74
Sub-Total	**£0.87**	**£0.00**	**£0.69**	**£0.00**	**£53.95**	**£3.68**	**£6.58**	**£65.77**
Other VOWH								
Botley	£0.11	£0.00	£0.45	£8.76	£0.14	£0.12	£2.39	£11.97
Faringdon	£0.00	£0.27	£0.80	£0.00	£2.07	£20.01	£1.22	£24.37
Village shops	£0.33	£2.18	£4.59	£2.16	£1.10	£5.96	£0.86	£17.18
Sub-Total	**£0.44**	**£2.45**	**£5.84**	**£10.91**	**£3.31**	**£26.09**	**£4.47**	**£53.51**
District Total	**£32.62**	**£36.42**	**£23.20**	**£18.99**	**£60.29**	**£31.02**	**£21.53**	**£224.07**
Oxford	£2.87	£4.26	£1.27	£12.07	£0.07	£0.12	n/a	£20.67
Didcot	£0.51	£3.81	£0.40	£0.00	£7.24	£0.00	n/a	£11.96
Swindon	£0.00	£0.00	£0.53	£0.00	£0.41	£8.00	n/a	£8.95
Other	£0.33	£0.86	£1.65	£1.13	£1.10	£1.52	n/a	£6.59
Other Total	**£3.70**	**£8.94**	**£3.85**	**£13.20**	**£8.83**	**£9.64**	**n/a**	**£48.16**
Total	**£36.32**	**£45.36**	**£27.05**	**£32.19**	**£69.12**	**£40.66**	**n/a**	**£272.23**

Table 9A: Convenience Expenditure 2019 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2019	**£37.75**	**£47.15**	**£27.59**	**£33.46**	**£71.70**	**£41.60**		**£259.25**
Abingdon								
Waitrose	£7.81	£15.28	£3.73	£3.81	£0.22	£0.12	£3.44	£34.41
Tesco Extra	£14.91	£11.65	£10.40	£3.91	£2.80	£0.50	£4.91	£49.08
Other Abingdon Shops	£9.82	£8.39	£2.68	£0.67	£0.00	£0.00	£2.39	£23.95
Sub-Total	**£32.54**	**£35.31**	**£16.81**	**£8.40**	**£3.01**	**£0.62**	**£10.74**	**£107.44**
Wantage								
Sainsbury's	£0.64	£0.00	£0.72	£0.00	£27.25	£2.37	£3.44	£34.42
Waitrose	£0.00	£0.00	£0.00	£0.00	£17.42	£1.21	£2.07	£20.70
Other Wantage/Grove	£0.26	£0.00	£0.00	£0.00	£11.40	£0.25	£1.32	£13.24
Sub-Total	**£0.91**	**£0.00**	**£0.72**	**£0.00**	**£56.07**	**£3.83**	**£6.84**	**£68.36**
Other VOWH								
Botley	£0.11	£0.00	£0.47	£9.10	£0.14	£0.12	£2.49	£12.44
Faringdon	£0.00	£0.28	£0.83	£0.00	£2.15	£20.80	£1.27	£25.33
Village shops	£0.34	£2.26	£4.77	£2.24	£1.15	£6.20	£0.89	£17.86
Sub-Total	**£0.45**	**£2.55**	**£6.07**	**£11.34**	**£3.44**	**£27.12**	**£4.65**	**£55.62**
District Total	**£33.90**	**£37.86**	**£23.59**	**£19.74**	**£62.52**	**£31.57**	**£22.23**	**£231.42**
Oxford	£2.98	£4.43	£1.32	£12.55	£0.07	£0.12	n/a	£21.48
Didcot	£0.53	£3.96	£0.41	£0.00	£7.53	£0.00	n/a	£12.43
Swindon	£0.00	£0.00	£0.55	£0.00	£0.43	£8.32	n/a	£9.30
Other	£0.34	£0.90	£1.71	£1.17	£1.15	£1.58	n/a	£6.85
Other Total	**£3.85**	**£9.29**	**£4.00**	**£13.72**	**£9.18**	**£10.02**	**n/a**	**£50.06**
Total	**£37.75**	**£47.15**	**£27.59**	**£33.46**	**£71.70**	**£41.60**	**n/a**	**£281.48**

Table 10A: Convenience Expenditure 2024 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2024	**£40.53**	**£50.62**	**£29.62**	**£35.92**	**£76.97**	**£44.66**		**£278.31**
Abingdon								
Waitrose	£8.39	£16.40	£4.00	£4.09	£0.23	£0.13	£3.69	£36.94
Tesco Extra	£16.01	£12.50	£11.17	£4.20	£3.00	£0.54	£5.27	£52.69
Other Abingdon Shops	£10.54	£9.01	£2.87	£0.72	£0.00	£0.00	£2.57	£25.71
Sub-Total	**£34.93**	**£37.91**	**£18.04**	**£9.02**	**£3.23**	**£0.67**	**£11.53**	**£115.34**
Wantage								
Sainsbury's	£0.69	£0.00	£0.77	£0.00	£29.25	£2.55	£3.69	£36.95
Waitrose	£0.00	£0.00	£0.00	£0.00	£18.70	£1.30	£2.22	£22.22
Other Wantage/Grove	£0.28	£0.00	£0.00	£0.00	£12.24	£0.27	£1.42	£14.21
Sub-Total	**£0.97**	**£0.00**	**£0.77**	**£0.00**	**£60.19**	**£4.11**	**£7.34**	**£73.38**
Other VOWH								
Botley	£0.12	£0.00	£0.50	£9.77	£0.15	£0.13	£2.67	£13.35
Faringdon	£0.00	£0.30	£0.89	£0.00	£2.31	£22.33	£1.36	£27.19
Village shops	£0.36	£2.43	£5.12	£2.41	£1.23	£6.65	£0.96	£19.17
Sub-Total	**£0.49**	**£2.73**	**£6.52**	**£12.18**	**£3.69**	**£29.12**	**£4.99**	**£59.71**
District Total	**£36.39**	**£40.64**	**£25.33**	**£21.19**	**£67.12**	**£33.89**	**£23.86**	**£248.43**
Oxford	£3.20	£4.76	£1.42	£13.47	£0.08	£0.13	n/a	£23.06
Didcot	£0.57	£4.25	£0.44	£0.00	£8.08	£0.00	n/a	£13.35
Swindon	£0.00	£0.00	£0.59	£0.00	£0.46	£8.93	n/a	£9.99
Other	£0.36	£0.96	£1.84	£1.26	£1.23	£1.70	n/a	£7.35
Other Total	**£4.13**	**£9.97**	**£4.30**	**£14.73**	**£9.85**	**£10.76**	**n/a**	**£53.74**
Total	**£40.53**	**£50.62**	**£29.62**	**£35.92**	**£76.97**	**£44.66**	**n/a**	**£302.17**

Table 11A: Convenience Expenditure 2029 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow	Total
Expenditure 2029	**£43.41**	**£54.21**	**£31.73**	**£38.47**	**£82.44**	**£47.83**	**n/a**	**£298.08**
Abingdon								
Waitrose	£8.99	£17.56	£4.28	£4.39	£0.25	£0.14	£3.96	£39.57
Tesco Extra	£17.15	£13.39	£11.96	£4.50	£3.22	£0.57	£5.64	£56.43
Other Abingdon Shops	£11.29	£9.65	£3.08	£0.77	£0.00	£0.00	£2.75	£27.54
Sub-Total	**£37.42**	**£40.60**	**£19.32**	**£9.66**	**£3.46**	**£0.72**	**£12.35**	**£123.53**
Wantage								
Sainsbury's	£0.74	£0.00	£0.82	£0.00	£31.33	£2.73	£3.96	£39.57
Waitrose	£0.00	£0.00	£0.00	£0.00	£20.03	£1.39	£2.38	£23.80
Other Wantage/Grove	£0.30	£0.00	£0.00	£0.00	£13.11	£0.29	£1.52	£15.22
Sub-Total	**£1.04**	**£0.00**	**£0.82**	**£0.00**	**£64.47**	**£4.40**	**£7.86**	**£78.60**
Other VOWH								
Botley	£0.13	£0.00	£0.54	£10.46	£0.16	£0.14	£2.86	£14.30
Faringdon	£0.00	£0.33	£0.95	£0.00	£2.47	£23.91	£1.46	£29.12
Village shops	£0.39	£2.60	£5.49	£2.58	£1.32	£7.13	£1.03	£20.53
Sub-Total	**£0.52**	**£2.93**	**£6.98**	**£13.04**	**£3.96**	**£31.18**	**£5.34**	**£63.95**
District Total	**£38.98**	**£43.53**	**£27.13**	**£22.70**	**£71.89**	**£36.30**	**£25.56**	**£266.08**
Oxford	£3.43	£5.10	£1.52	£14.43	£0.08	£0.14	n/a	£24.70
Didcot	£0.61	£4.55	£0.48	£0.00	£8.66	£0.00	n/a	£14.29
Swindon	£0.00	£0.00	£0.63	£0.00	£0.49	£9.57	n/a	£10.69
Other	£0.39	£1.03	£1.97	£1.35	£1.32	£1.82	n/a	£7.87
Other Total	**£4.43**	**£10.68**	**£4.60**	**£15.77**	**£10.55**	**£11.53**	**n/a**	**£57.56**
Total	**£43.41**	**£54.21**	**£31.73**	**£38.47**	**£82.44**	**£47.83**	**n/a**	**£323.64**

Table 12A: Summary of Convenience Turnover 2012 to 2029 (£Million)

Town	2012	2016	2019	2024	2029
Available Expenditure in District					
Abingdon	£103.98	£104.79	£107.44	£115.34	£123.53
Wantage/Grove	£63.43	£65.77	£68.36	£73.38	£78.60
Botley	£11.43	£11.97	£12.44	£13.35	£14.30
Faringdon*	£9.42	£24.37	£25.33	£27.19	£29.12
Other VOWH	£17.68	£17.18	£17.86	£19.17	£20.53
Total	**£205.93**	**£224.07**	**£231.42**	**£248.43**	**£266.08**
Benchmark Turnover of Existing Facilities					
Abingdon	£94.10	£94.10	£94.10	£94.10	£94.10
Wantage/Grove	£51.95	£51.95	£51.95	£51.95	£51.95
Botley	£13.33	£13.33	£13.33	£13.33	£13.33
Faringdon*	£7.72	£24.39	£24.39	£24.39	£24.39
Other VOWH	£17.68	£17.68	£17.68	£17.68	£17.68
Total	**£184.78**	**£201.45**	**£201.45**	**£201.45**	**£201.45**
Surplus/Deficit Expenditure					
Abingdon	£9.88	£10.69	£13.34	£21.24	£29.43
Wantage/Grove	£11.48	£13.82	£16.41	£21.44	£26.65
Botley	-£1.91	-£1.36	-£0.89	£0.02	£0.97
Faringdon	£1.70	-£0.02	£0.94	£2.80	£4.73
Other VOWH	£0.00	-£0.50	£0.18	£1.49	£2.85
Total	**£21.15**	**£22.62**	**£29.97**	**£46.98**	**£64.63**
Turnover Density New Floorspace £ psm					
Large food stores	£13,000	£13,000	£13,000	£13,000	£13,000
Local Shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace sq.m (net)					
Abingdon	760	822	1,026	1,634	2,264
Wantage/Grove	883	1,063	1,262	1,649	2,050
Botley	-147	-105	-69	2	75
Faringdon	130	-2	72	216	364
Other VOWH	0	-100	35	298	570
Total	**1,627**	**1,678**	**2,327**	**3,797**	**5,322**
Floorspace sq.m (gross)					
Abingdon	1,086	1,175	1,466	2,334	3,234
Wantage/Grove	1,262	1,519	1,803	2,356	2,928
Botley	-209	-150	-98	2	107
Faringdon	186	-2	103	308	520
Other VOWH	0	-143	50	425	814
Total	**2,324**	**2,398**	**3,324**	**5,425**	**7,603**

Sources: Tables 6A to 10A

* Tesco in Faringdon added at 2016

Table 13A: Convenience Shopping Penetration Rates 2019 (with commitment and proposals)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Inflow
Abingdon	86.8%	73.6%	54.9%	21.0%	5.1%	1.7%	10.0%
Wantage	2.1%	0.0%	2.1%	0.0%	75.9%	9.0%	10.0%
Botley	2.0%	5.0%	10.0%	40.0%	2.0%	2.0%	40.0%
Faringdon	0.0%	0.6%	2.7%	0.0%	3.0%	48.5%	5.0%
Village shops	0.9%	4.7%	17.0%	6.6%	1.5%	14.9%	5.0%
District Total	**91.8%**	**83.9%**	**86.7%**	**67.6%**	**87.5%**	**76.1%**	
Oxford	6.5%	7.5%	3.9%	29.3%	0.1%	0.3%	n/a
Didcot	1.0%	7.1%	1.5%	0.0%	10.3%	0.0%	n/a
Swindon	0.0%	0.0%	2.0%	0.0%	0.6%	19.8%	n/a
Other	0.7%	1.5%	5.9%	3.1%	1.5%	3.8%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012 and NLP adjustments

Table 14A: Summary of Convenience Turnover 2012 to 2029 (£Million) - With Proposals

Town	2012	2016	2019	2024	2029
Available Expenditure in District					
Abingdon	£103.98	£104.79	£104.45	£112.13	£120.10
Wantage/Grove	£63.43	£65.77	£66.15	£71.02	£76.06
Botley	£11.43	£11.97	£35.87	£38.51	£41.24
Faringdon	£9.42	£24.37	£24.58	£26.39	£28.26
Other VOWH	£17.68	£17.18	£17.61	£18.90	£20.25
Total	**£205.93**	**£224.07**	**£248.67**	**£266.95**	**£285.91**
Benchmark Turnover of Existing Facilities					
Abingdon	£94.10	£94.10	£127.90	£127.90	£127.90
Wantage/Grove	£51.95	£51.95	£55.95	£55.95	£55.95
Botley	£13.33	£13.33	£39.00	£39.00	£39.00
Faringdon	£7.72	£24.39	£24.39	£24.39	£24.39
Other VOWH	£17.68	£17.68	£17.68	£17.68	£17.68
Total	**£184.78**	**£201.45**	**£264.92**	**£264.92**	**£264.92**
Surplus/Deficit Expenditure					
Abingdon	£9.88	£10.69	-£23.45	-£15.77	-£7.80
Wantage/Grove	£11.48	£13.82	£10.21	£15.07	£20.11
Botley	-£1.91	-£1.36	-£3.13	-£0.49	£2.24
Faringdon	£1.70	-£0.02	£0.20	£2.00	£3.88
Other VOWH	£0.00	-£0.50	-£0.07	£1.22	£2.57
Total	**£21.15**	**£22.62**	**-£16.25**	**£2.03**	**£21.00**
Turnover Density New Floorspace £ psm					
Large food stores	£13,000	£13,000	£13,000	£13,000	£13,000
Local Shops	£5,000	£5,000	£5,000	£5,000	£5,000
Floorspace sq.m (net)					
Abingdon	760	822	-1,804	-1,213	-600
Wantage/Grove	883	1,063	785	1,159	1,547
Botley	-147	-105	-241	-38	172
Faringdon	130	-2	15	154	298
Other VOWH	0	-100	-14	244	513
Total	**1,627**	**1,678**	**-1,259**	**307**	**1,931**
Floorspace sq.m (gross)					
Abingdon	1,086	1,175	-2,577	-1,733	-857
Wantage/Grove	1,262	1,519	1,122	1,656	2,210
Botley	-209	-150	-344	-54	246
Faringdon	186	-2	21	220	426
Other VOWH	0	-143	-21	349	733
Total	**2,324**	**2,398**	**-1,798**	**439**	**2,758**

Sources: Table 13A

Appendix 3 Comparison Assessment

Table 1B: Population Projections

Zone Area	2001	2011	2012	2016	2019	2024	2029
Zone 1: Abingdon	19,199	20,091	20,047	19,871	20,434	21,234	21,946
Zone 2: Abingdon Rural East	22,843	23,904	23,914	23,954	24,633	25,597	26,455
Zone 3: Abingdon Rural West	12,938	13,539	13,545	13,569	13,954	14,500	14,986
Zone 4: Botley	14,609	15,288	15,472	16,208	16,667	17,319	17,900
Zone 5: Wantage	29,698	31,078	32,092	36,148	37,172	38,627	39,922
Zone 6: Faringdon	17,875	18,706	18,894	19,646	20,202	20,993	21,697
Total	**117,162**	**122,606**	**123,964**	**129,396**	**133,062**	**138,271**	**142,905**

Sources:
Experian 2001 small area population and 2011 Census of population.
Oxfordshire County Council ward level population projections 2011 to 2016
Oxfordshire County Council district population projections 2016 to 2026
OCC based growth rate projection (0.935% per annum - 2016 to 2021)
OCC based growth rate projection (0.661% per annum - 2021 to 2029)

Table 2B: Comparison Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2012	2016	2019	2024	2029
Zone 1: Abingdon	£2,629	£2,806	£2,987	£3,401	£3,919
Zone 2: Abingdon Rural East	£2,822	£3,011	£3,206	£3,650	£4,206
Zone 3: Abingdon Rural West	£3,052	£3,257	£3,467	£3,948	£4,549
Zone 4: Botley	£3,020	£3,223	£3,431	£3,907	£4,502
Zone 5: Wantage	£2,849	£3,040	£3,236	£3,685	£4,246
Zone 6: Faringdon	£3,117	£3,326	£3,541	£4,032	£4,646

Sources:
Experian local estimates for 2011 comparison goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates

Table 3B: Total Available Comparison Goods Expenditure (£M - 2011 Prices)

Zone	2012	2016	2019	2024	2029	Growth 2012-2019	Growth 2012-2024	Growth 2012-2029
Zone 1: Abingdon	£52.71	£55.75	£61.03	£72.22	£86.00	15.8%	37.0%	63.2%
Zone 2: Abingdon Rural East	£67.49	£72.13	£78.96	£93.44	£111.28	17.0%	38.4%	64.9%
Zone 3: Abingdon Rural West	£41.35	£44.19	£48.38	£57.25	£68.18	17.0%	38.5%	64.9%
Zone 4: Botley	£46.73	£52.24	£57.18	£67.66	£80.58	22.4%	44.8%	72.4%
Zone 5: Wantage	£91.42	£109.87	£120.28	£142.33	£169.50	31.6%	55.7%	85.4%
Zone 6: Faringdon	£58.90	£65.34	£71.53	£84.64	£100.80	21.5%	43.7%	71.2%
Total	**£358.59**	**£399.53**	**£437.36**	**£517.54**	**£616.34**	**22.0%**	**44.3%**	**71.9%**

Sources: Table 1B and Table 2B

Table 4B: Comparison Shopping Penetration Rates 2012

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon 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%
Botley, Homebase	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%
District Total	**52.7%**	**46.3%**	**41.4%**	**23.0%**	**47.8%**	**22.5%**	
Elsewhere							
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
Sub-Total	**47.3%**	**53.7%**	**58.6%**	**77.0%**	**52.2%**	**77.5%**	
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012

Table 5B: Comparison Expenditure 2012 £Million

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
Expenditure 2012	**£52.71**	**£67.49**	**£41.35**	**£46.73**	**£91.42**	**£58.90**		**£358.59**
VOWH District								
Abingdon	£26.51	£30.30	£15.59	£7.38	£13.16	£3.06	£10.67	£106.68
Wantage/Grove	£0.74	£0.34	£0.54	£0.05	£30.08	£5.07	£4.09	£40.89
Botley	£0.00	£0.00	£0.08	£1.40	£0.00	£0.00	£0.08	£1.56
Botley, Homebase	£0.11	£0.07	£0.33	£1.26	£0.09	£0.00	£2.79	£4.64
Faringdon	£0.00	£0.00	£0.08	£0.00	£0.00	£4.12	£0.47	£4.67
Other VOWH	£0.42	£0.54	£0.50	£0.65	£0.37	£1.00	£0.18	£3.66
District Total	**£27.78**	**£31.25**	**£17.12**	**£10.75**	**£43.70**	**£13.25**	**£18.27**	**£162.11**
Elsewhere								
Botley Retail Park	£1.00	£0.67	£1.78	£3.74	£0.73	£0.12	n/a	£8.04
Oxford	£15.60	£20.99	£11.33	£24.35	£15.91	£7.42	n/a	£95.60
Didcot	£1.90	£4.79	£1.36	£0.00	£7.40	£0.29	n/a	£15.75
Swindon	£0.26	£0.34	£2.19	£0.51	£4.75	£28.92	n/a	£36.98
Other Outside District	£6.17	£9.45	£7.57	£7.38	£18.92	£8.89	n/a	£58.38
Sub-Total	**£24.93**	**£36.24**	**£24.23**	**£35.98**	**£47.72**	**£45.64**	n/a	**£214.75**
Total	**£52.71**	**£67.49**	**£41.35**	**£46.73**	**£91.42**	**£58.90**		**£376.86**

Table 6B: Comparison Expenditure 2016 £Million

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
Expenditure 2016	**£55.75**	**£72.13**	**£44.19**	**£52.24**	**£109.87**	**£65.34**		**£399.53**
VOWH District								
Abingdon	£28.04	£32.39	£16.66	£8.25	£15.82	£3.40	£11.62	£116.18
Wantage/Grove	£0.78	£0.36	£0.57	£0.05	£36.15	£5.62	£4.84	£48.37
Botley	£0.00	£0.00	£0.09	£1.57	£0.00	£0.00	£0.09	£1.74
Botley, Homebase	£0.11	£0.07	£0.35	£1.41	£0.11	£0.00	£3.09	£5.14
Faringdon	£0.00	£0.00	£0.09	£0.00	£0.00	£4.57	£0.52	£5.18
Other VOWH	£0.45	£0.58	£0.53	£0.73	£0.44	£1.11	£0.20	£4.04
District Total	**£29.38**	**£33.40**	**£18.30**	**£12.01**	**£52.52**	**£14.70**	**£20.35**	**£180.66**
Elsewhere								
Botley Retail Park	£1.06	£0.72	£1.90	£4.18	£0.88	£0.13	n/a	£8.87
Oxford	£16.50	£22.43	£12.11	£27.21	£19.12	£8.23	n/a	£105.61
Didcot	£2.01	£5.12	£1.46	£0.00	£8.90	£0.33	n/a	£17.81
Swindon	£0.28	£0.36	£2.34	£0.57	£5.71	£32.08	n/a	£41.35
Other Outside District	£6.52	£10.10	£8.09	£8.25	£22.74	£9.87	n/a	£65.57
Sub-Total	**£26.37**	**£38.74**	**£25.90**	**£40.22**	**£57.35**	**£50.64**	n/a	**£239.22**
Total	**£55.75**	**£72.13**	**£44.19**	**£52.24**	**£109.87**	**£65.34**		**£419.88**

Table 7B: Comparison Expenditure 2019 £Million

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
Expenditure 2019	**£61.03**	**£78.96**	**£48.38**	**£57.18**	**£120.28**	**£71.53**		**£437.36**
VOWH District								
Abingdon	£30.70	£35.45	£18.24	£9.03	£17.32	£3.72	£12.72	£127.18
Wantage/Grove	£0.85	£0.39	£0.63	£0.06	£39.57	£6.15	£5.30	£52.95
Botley	£0.00	£0.00	£0.10	£1.72	£0.00	£0.00	£0.10	£1.91
Botley, Homebase	£0.12	£0.08	£0.39	£1.54	£0.12	£0.00	£3.38	£5.63
Faringdon	£0.00	£0.00	£0.10	£0.00	£0.00	£5.01	£0.57	£5.67
Other VOWH	£0.49	£0.63	£0.58	£0.80	£0.48	£1.22	£0.22	£4.42
District Total	**£32.16**	**£36.56**	**£20.03**	**£13.15**	**£57.49**	**£16.09**	**£22.28**	**£197.77**
Elsewhere								
Botley Retail Park	£1.16	£0.79	£2.08	£4.57	£0.96	£0.14	n/a	£9.71
Oxford	£18.06	£24.56	£13.26	£29.79	£20.93	£9.01	n/a	£115.61
Didcot	£2.20	£5.61	£1.60	£0.00	£9.74	£0.36	n/a	£19.50
Swindon	£0.31	£0.39	£2.56	£0.63	£6.25	£35.12	n/a	£45.27
Other Outside District	£7.14	£11.05	£8.85	£9.03	£24.90	£10.80	n/a	£71.78
Sub-Total	**£28.87**	**£42.40**	**£28.35**	**£44.03**	**£62.78**	**£55.44**	n/a	**£261.87**
Total	**£61.03**	**£78.96**	**£48.38**	**£57.18**	**£120.28**	**£71.53**		**£459.64**

Table 8B: Comparison Expenditure 2024 £Million

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
Expenditure 2024	**£72.22**	**£93.44**	**£57.25**	**£67.66**	**£142.33**	**£84.64**		**£517.54**
VOWH District								
Abingdon	£36.33	£41.95	£21.58	£10.69	£20.50	£4.40	£15.05	£150.50
Wantage/Grove	£1.01	£0.47	£0.74	£0.07	£46.83	£7.28	£6.27	£62.66
Botley	£0.00	£0.00	£0.11	£2.03	£0.00	£0.00	£0.11	£2.26
Botley, Homebase	£0.14	£0.09	£0.46	£1.83	£0.14	£0.00	£4.00	£6.66
Faringdon	£0.00	£0.00	£0.11	£0.00	£0.00	£5.93	£0.67	£6.71
Other VOWH	£0.58	£0.75	£0.69	£0.95	£0.57	£1.44	£0.26	£5.23
District Total	**£38.06**	**£43.26**	**£23.70**	**£15.56**	**£68.03**	**£19.05**	**£26.36**	**£234.02**
Elsewhere								
Botley Retail Park	£1.37	£0.93	£2.46	£5.41	£1.14	£0.17	n/a	£11.49
Oxford	£21.38	£29.06	£15.69	£35.25	£24.76	£10.67	n/a	£136.80
Didcot	£2.60	£6.63	£1.89	£0.00	£11.53	£0.42	n/a	£23.07
Swindon	£0.36	£0.47	£3.03	£0.74	£7.40	£41.56	n/a	£53.57
Other Outside District	£8.45	£13.08	£10.48	£10.69	£29.46	£12.78	n/a	£84.94
Sub-Total	**£34.16**	**£50.18**	**£33.55**	**£52.10**	**£74.29**	**£65.60**	n/a	**£309.88**
Total	**£72.22**	**£93.44**	**£57.25**	**£67.66**	**£142.33**	**£84.64**		**£543.90**

Table 9B: Comparison Expenditure 2029 £Million

Centre/Facilities	Zone 1 Abingdon	Zone 2 Abingdon East	Zone 3 Abingdon West	Zone 4 Botley	Zone 5 Wantage	Zone 6 Faringdon	Inflow	Total
Expenditure 2029	**£86.00**	**£111.28**	**£68.18**	**£80.58**	**£169.50**	**£100.80**		**£616.34**
VOWH District								
Abingdon	£43.26	£49.96	£25.70	£12.73	£24.41	£5.24	£17.92	£179.23
Wantage/Grove	£1.20	£0.56	£0.89	£0.08	£55.76	£8.67	£7.46	£74.62
Botley	£0.00	£0.00	£0.14	£2.42	£0.00	£0.00	£0.13	£2.69
Botley, Homebase	£0.17	£0.11	£0.55	£2.18	£0.17	£0.00	£4.76	£7.93
Faringdon	£0.00	£0.00	£0.14	£0.00	£0.00	£7.06	£0.80	£7.99
Other VOWH	£0.69	£0.89	£0.82	£1.13	£0.68	£1.71	£0.31	£6.23
District Total	**£45.32**	**£51.52**	**£28.23**	**£18.53**	**£81.02**	**£22.68**	**£31.39**	**£278.70**
Elsewhere								
Botley Retail Park	£1.63	£1.11	£2.93	£6.45	£1.36	£0.20	n/a	£13.68
Oxford	£25.46	£34.61	£18.68	£41.98	£29.49	£12.70	n/a	£162.92
Didcot	£3.10	£7.90	£2.25	£0.00	£13.73	£0.50	n/a	£27.48
Swindon	£0.43	£0.56	£3.61	£0.89	£8.81	£49.49	n/a	£63.79
Other Outside District	£10.06	£15.58	£12.48	£12.73	£35.09	£15.22	n/a	£101.16
Sub-Total	**£40.68**	**£59.76**	**£39.95**	**£62.05**	**£88.48**	**£78.12**	n/a	**£369.04**
Total	**£86.00**	**£111.28**	**£68.18**	**£80.58**	**£169.50**	**£100.80**		**£647.73**

Table 10B: Comparison Floorspace

Location	Floorspace sq.m gross	Sales Floorspace sq.m net
Abingdon		
Abingdon Town centre	11,130	7,791
Comparison sales in food stores	n/a	3,621
B&Q	2,517	2,370
AHF Furniture	2,371	2,015
Lee Longlands	2,022	1,719
Vineys	1,637	1,391
Pets at Home	701	602
Homebase	4,959	5,406
Carpetright	911	847
Argos	1,198	479
Dreams	480	408
Home Store & More	2,082	1,770
Beales (Electrical / Textiles)	1,339	1,138
Topps Tiles	400	360
Furniture Village	1,886	1,603
Abingdon Sub-Total	**33,633**	**31,521**
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
	4,212	**4,490**
Faringdon		
Faringdon town centre	2,710	1,626
Comparison sales in food stores	n/a	103
Wantage/Grove Sub-Total	**2,710**	**1,729**
GRAND TOTAL	n/a	**46,339**
Commitments		
Tesco, Faringdon (commitment)	n/a	144
New Units Abbey Centre, Abingdon	1,800	1,350
Proposals		
Botley redevelopment	n/a	2,000
Abbey Shopping Centre SPD Food Store	n/a	1,400
Grove Airfield Local Centre*	680	500

Sources: Goad Plans, VOA and NLP site survey
* assumes 20% of retail space (3,400 sq m gross) is comparison

Table 11B: Summary of Comparison Floorspace Capacity 2012 to 2029

Town	2012	2016	2019	2024	2029
Available Expenditure in District					
Abingdon	£106.68	£116.18	£127.18	£150.50	£179.23
Wantage/Grove	£40.89	£48.37	£52.95	£62.66	£74.62
Botley (incl. Homebase)	£6.20	£6.89	£7.54	£8.92	£10.62
Faringdon	£4.67	£5.18	£5.67	£6.71	£7.99
Other VOWH	£3.66	£4.04	£4.42	£5.23	£6.23
Total	**£162.11**	**£180.66**	**£197.77**	**£234.02**	**£278.70**
Turnover of Existing Facilities					
Abingdon	£106.68	£114.57	£120.87	£132.15	£144.48
Wantage/Grove	£40.89	£43.92	£46.33	£50.65	£55.38
Botley	£6.20	£6.66	£7.03	£7.69	£8.40
Faringdon	£4.67	£5.02	£5.29	£5.79	£6.33
Other VOWH	£3.66	£3.93	£4.15	£4.54	£4.96
Total	**£162.11**	**£174.10**	**£183.68**	**£200.81**	**£219.55**
Surplus Expenditure					
Abingdon	n/a	£1.61	£6.31	£18.35	£34.75
Wantage/Grove	n/a	£4.46	£6.62	£12.01	£19.25
Botley	n/a	£0.22	£0.51	£1.23	£2.22
Faringdon	n/a	£0.16	£0.38	£0.92	£1.66
Other VOWH	n/a	£0.10	£0.27	£0.69	£1.27
Total	**n/a**	**£6.56**	**£14.09**	**£33.21**	**£59.15**
Turnover Density for New Floorspace (£ per sq.m)	£5,000	£5,370	£5,665	£6,194	£6,771
Sales Floorspace (sq.m net)					
Abingdon	n/a	322	1,262	3,670	6,950
Wantage/Grove	n/a	892	1,325	2,402	3,849
Botley	n/a	44	102	247	444
Faringdon	n/a	32	75	185	333
Other VOWH	n/a	21	54	139	254
Total	**n/a**	**1,311**	**2,818**	**6,642**	**11,829**
Floorspace (sq.m gross)					
Abingdon	n/a	429	1,683	4,893	9,267
Wantage/Grove	n/a	1,189	1,766	3,202	5,132
Botley	n/a	59	135	329	592
Faringdon	n/a	43	100	246	444
Other VOWH	n/a	28	72	185	338
Total	**n/a**	**1,748**	**3,757**	**8,855**	**15,773**

Sources: Tables 5B to 10B

Appendix 4 Audit of Centres

A. Abingdon

Abingdon, together with Wantage, is one of the main shopping and commercial centres within VOWH, and is located in the east of the District. The centre has a variety of retail and service uses, and is the administrative centre for VOWH.

Figure A.1 Aerial View of Abingdon Town Centre

The key roles of Abingdon include:

- **convenience shopping**: Waitrose is the main food store destination. It is supported by two Co-op stores and a Spar, plus a small selection of bakers, newsagents, confectioners and food specialists;
- **comparison shopping**: offers a mix of national multiple retailers and small independent traders. Most national multiples are located within the Abbey Centre, which accommodates Boots, Poundland, Superdrug and WH Smith;
- **services**: provides a good range and choice of services including high street banks, estate agents, hairdressers, cafés, restaurants, pubs and takeaways;
- **entertainment**: a health club and museum;
- **community facilities**: medical surgeries, library and civic offices.

Mix of Uses and Occupier Representation

Abingdon has a total of 179 retail/service uses. The diversity of uses present in Abingdon in terms of the number of units is set out in Table A.1, compared against the national average.

Table A.1: Abingdon Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	65	36.3	41.4
Convenience Retail	13	7.3	8.6
A1 Services (2)	22	12.3	10.8
A2 Services	30	16.7	8.5
A3/A5	29	16.2	15.8
Vacant	20	11.2	13.7
Total	**179**	**100.0**	**100.0**

Source: Goad Plans April 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre's mix of units is broadly similar to the national average, but with a higher proportion of non-retail services, in particular Class A2 services. The proportion of comparison and convenience retail units is only marginally lower than the national average. The vacancy rate is slightly below the national average, which suggests the health of the centre in this respect is satisfactory.

Retailer Representation

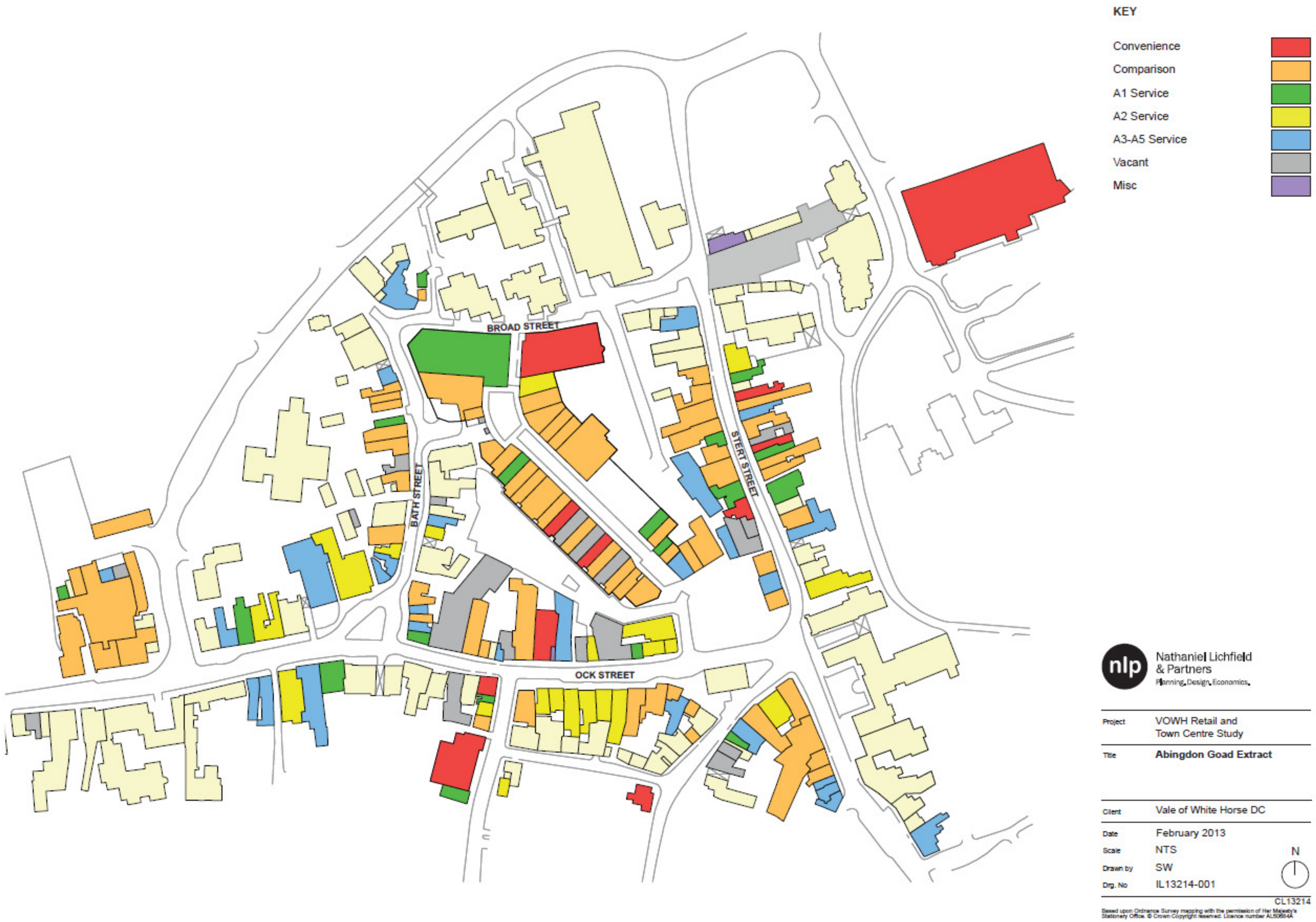
Abingdon has a good selection of comparison shops (65) when compared with other centres in the District, reflecting its role in the retail hierarchy in the District. Table A.2 provides a breakdown of comparison shop units by category.

Table A,2: Abingdon Breakdown of Comparison Units

Type of Unit	Abingdon		% UK* Average
	Units	%	
Clothing and footwear	18	27.7	26.3
Furniture, carpets and textiles	7	10.8	8.4
Booksellers, arts, crafts and stationers	4	6.1	10.7
Electrical, gas, music and photography	2	3.1	9.4
DIY, hardware and homewares	2	3.1	6.1
China, glass, gifts and fancy goods	3	4.6	3.9
Cars, motorcycles and motor access.	0	0.0	2.9
Chemists, drug stores and opticians	9	13.8	9.3
Variety, department and catalogue	1	1.5	1.4
Florists, nurserymen and seedsmen	2	3.1	2.2
Toys, hobby, cycle and sport	4	6.1	5.4
Jewellers	5	7.7	4.9
Other comparison retailers	8	12.3	9.1
Total	**65**	**100.0**	**100.0**

*Source: Goad Plan April 2012 * UK average for all town centres surveyed by Goad Plans (June 2012)*

Figure A.2: GOAD Plan of Abingdon Town Centre



The centre provides most of the Goad Plan comparison categories apart from car accessories. The choice of clothing shops is reasonable but the choice in most other categories is limited. The centre has a good provision of chemists and opticians. There are six charity shops and one discount retailer within the 'other comparison retailers' category.

Service Uses

Abingdon has a good range of non-retail service uses, with all categories present and well represented (see Table A.3). As indicated earlier there is a high provision of Class A2 uses i.e. banks/building societies and estate agents. This good range of services reflects Abingdon's day to day shopping and service role.

Table A.3: Abingdon Analysis of Selected Service Uses

Type of Unit	Abingdon		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	29	42.6	45.2
Banks/other financial services	12	17.7	13.4
Estate agents/valuers	10	14.7	10.8
Travel agents	2	2.9	3.5
Hairdressers/beauty parlours	14	20.6	24.4
Laundries/dry cleaners	1	1.5	2.7
Total	**68**	**100.0**	**100.0**

Source: Goad Plan April 2012 ** UK average for all town centres surveyed by Goad Plans (June 2012)*

Vacant Units

There were 20 vacant retail units within Abingdon at the time of the Goad survey, giving a vacancy rate of 11.2%, below the national average of 13.7%. Five of the vacant units are within the Abbey Centre which is currently undergoing refurbishment, and these vacant units do not necessary reflect a weakness in the demand for units in Abingdon. The remaining vacant units are spread throughout the centre and there are no obvious concentrations or areas for concern.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Abingdon. Over 36% mentioned a better choice of shops and 15.9% specifically mentioned more clothing shops. The next most suggested improvement (8.4%) was more car parking and 6.4% wanted free car parking. Other main responses were 7.4% wanted better quality shops and 6.2% wanted more large shops. Better maintenance/cleanliness was mentioned by 5.2%. No other answer achieved more than 5%.

Summary of Abingdon's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of national and independent comparison retailers.
- The centre has a good range and choice of non-retail services.
- The centre has a relatively low vacancy rate, and includes units being refurbished.
- The Waitrose and Co-op stores cater for both main and top up food shopping. The Waitrose store acts as an important anchor attracting customers to the town centre.
- The centre is compact and there are natural circuits for pedestrians.
- The Abbey Centre provides a safe and pleasant shopping environment.
- Overall the shopping environment is well maintained and pleasant, particularly the Market Place.

Weaknesses

- The centre does not offer the same choice of comparison shops available in larger centres such as Oxford or Swindon.
- Narrow streets and pavements hinder pedestrian movement in parts of the centre.
- Many shop units are small period buildings that do not meet the modern requirements of many operators.
- The provision of leisure and entertainment facilities other than restaurants and pubs is limited.
- Other than the Abbey Centre, there are limited major development opportunities within the centre.

B. Wantage

Wantage, along with Abingdon, is one of the main shopping and commercial centres within VOWH, and is located to the south of the District.

Figure B.1 Aerial View of Wantage Town Centre

The key roles of Wantage include:

- **convenience shopping**: the Sainsbury's and Waitrose stores provide the main convenience food store provision within Wantage. They are supported by a Costcutter and smaller units including newsagents, bakers, a butcher, off license and health food shops;
- **comparison shopping**: predominantly independent traders but also a small range of national multiple retailers. The Kings Park development has significantly improved shopping provision, including Argos, B&M Bargains, New Look;
- **services**: provides a range of services including a post office, high street banks, cafés, restaurants, takeaways and hairdressers;
- **entertainment**: including a museum and health club;
- **community facilities**: provides a range of community services including community halls, library, dentist and kindergarten.

Mix of Uses and Occupier Representation

Wantage has a total of 144 retail/service units. The diversity of uses present in Wantage in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1: Wantage Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	55	38.2	41.4
Convenience Retail	12	8.3	8.6
A1 Services (2)	20	13.9	10.8
A2 Services	18	12.5	8.5
A3/A5	15	10.4	15.8
Vacant	24	16.7	13.7
Total	**144**	**100.0**	**100.0**

Source: Goad Plans March 2011
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre's mix of units is broadly similar to the national average, but with a higher proportion of non-retail services, in particular Class A1 and A2 services. The proportion of convenience retail units is only marginally lower than the national average, with the proportion of comparison retail units around 3% below the national average. The vacancy rate is 3% above the national average.

Retailer Representation

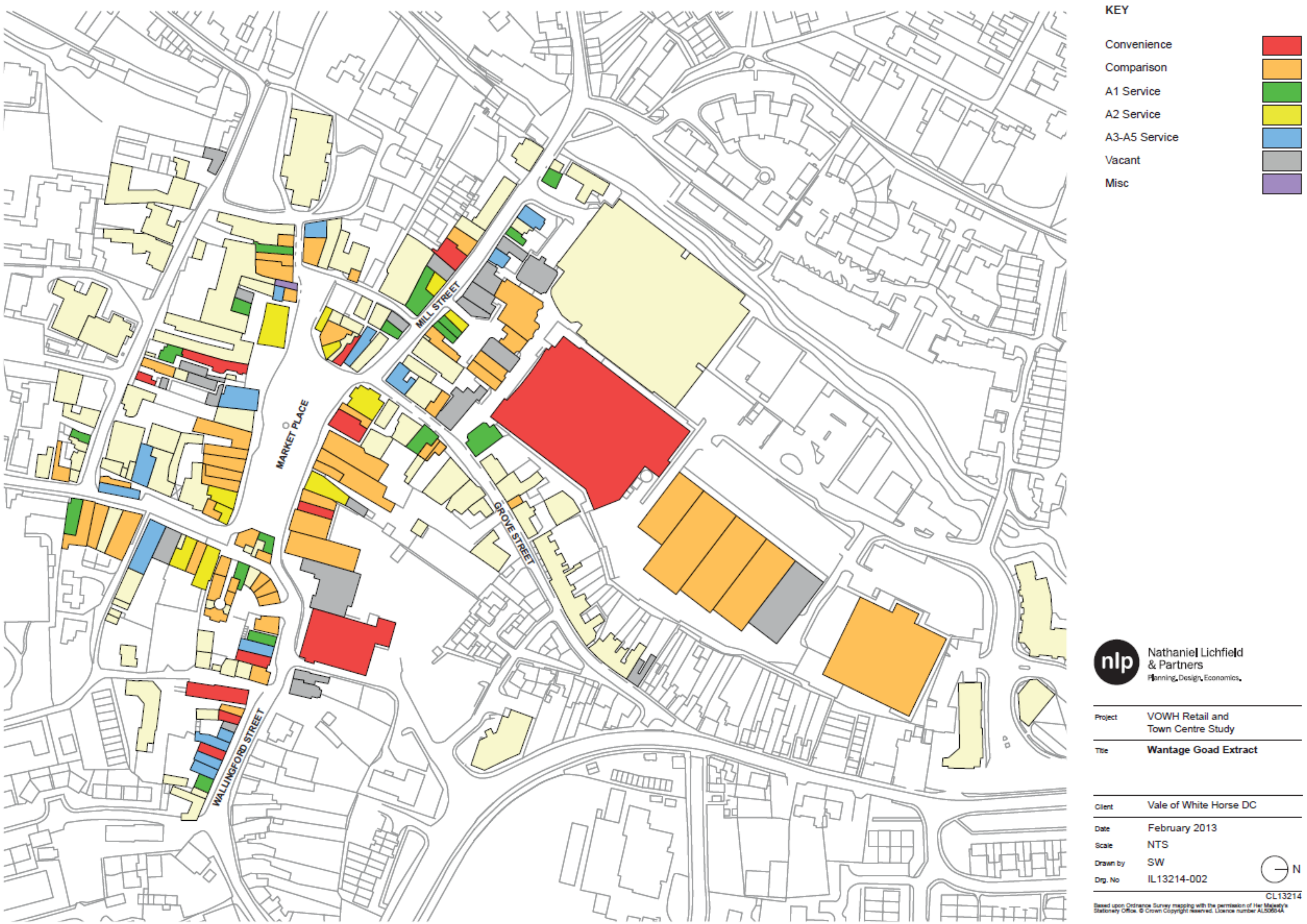
Wantage has a reasonable range of comparison shops (55), reflecting its size and role in the retail hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category.

Table B.2: Wantage Breakdown of Comparison Units

Type of Unit	Wantage		% UK*
	Units	%	Average
Clothing and footwear	7	12.7	26.3
Furniture, carpets and textiles	3	5.4	8.4
Booksellers, arts, crafts and stationers	3	5.4	10.7
Electrical, gas, music and photography	4	7.3	9.4
DIY, hardware and homewares	6	10.9	6.1
China, glass, gifts and fancy goods	5	9.1	3.9
Cars, motorcycles and motor access.	1	1.8	2.9
Chemists, drug stores and opticians	5	9.1	9.3
Variety, department and catalogue	2	3.6	1.4
Florists, nurserymen and seedsmen	2	3.6	2.2
Toys, hobby, cycle and sport	3	5.4	5.4
Jewellers	4	7.3	4.9
Other comparison retailers	10	18.2	9.1
Total	**55**	**100.0**	**100.0**

*Source: Goad Plan; * UK average for all town centres surveyed by Goad Plans (June 2012).*

Figure B.1 GOAD Plan of Wantage Town Centre



All Goad categories of comparison retailers are represented in the centre, but the choice of shops within each category is relatively limited. The proportion and number of clothing shop is low. There are six charity shops within the 'other comparison retailers' category.

Service Uses

Wantage has a good range of service uses, with all categories represented (see Table B.3). In most categories. the representation is higher or similar to the national average, with the exception of restaurants/cafés/takeaways.

Table B.3: Wantage Analysis of Selected Service Uses

Type of Unit	Wantage		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	15	34.9	45.2
Banks/other financial services	7	16.3	13.4
Estate agents/valuers	5	11.6	10.8
Travel agents	2	4.7	3.5
Hairdressers/beauty parlours	13	30.2	24.4
Laundries/dry cleaners	1	2.3	2.7
Total	**43**	**100.0**	**100.0**

Source: Goad March 2012 and NLP July 2012
* UK average for all town centres surveyed by Goad Plans (June 2012).

Vacant Units

There were 24 vacant retail units within Wantage at the time of the Goad survey, which equates to a vacancy rate of 16.7%, above the national average of 13.7%. Vacant units are spread throughout the centre and are generally small, but there is a concentration of vacant units in Mill Street.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Wantage. In the study area as a whole, over 50% indicated nothing would make them shop more often in Wantage and 19% indicated they did not know, therefore nearly 70% did not suggest any improvements in Wantage. The main answer given was a better choice of shops in general (17.4%), and 9.3% specifically mentioned more clothing shops. The next most suggested improvement (6.2%) was better quality shops. No other answer achieved more than 5% across the study area. In the Wantage zone (zone 5) 7.1% mentioned having fewer low quality shops and 5.1% mentioned more food supermarkets.

Summary of Wantage's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of national and independent comparison retailers. The Kings Park development provides large format stores that help attract customers to the centre.
- The centre has a good range and choice of non-retail services.
- The Sainsbury's and Waitrose stores cater for both main and top up food shopping. The Sainsbury's store acts as an important anchor attracting customers to the town centre.
- The Sainsbury's and Waitrose stores and Kings Park provide a large number of car parking spaces.
- The centre is compact for pedestrians.
- Overall the shopping environment is well maintained and pleasant.

Weaknesses

- The centre has a relatively high proportion of vacant units, particularly in peripheral areas.
- The centre has a limited range and choice of comparison shops compared to larger centres such as Oxford and Swindon.
- The provision of leisure and entertainment facilities other than restaurants and pubs is limited.

C. Faringdon

Faringdon is a small market town and has a smaller catchment area than Abingdon and Wantage. It is located in the west of the District. The town falls within the sub-regional catchment area of Swindon.

Figure C.1 Aerial View of Faringdon Town Centre

The key roles of Faringdon include:

- **convenience shopping**: primarily top up food shopping at the Budgens store, supported by a newsagents, bakers, butchers and delicatessens;
- **comparison shopping**: a limited range of comparison shops and predominantly independent traders serving day to day shopping needs. Boots the chemist is the main national multiple.
- **services**: provides a range of services including a post office, banks, cafés, restaurants, takeaways, hairdressers and bookmakers.

Mix of Uses and Occupier Representation

Faringdon has only 49 retail/service units. The diversity of uses present in Faringdon in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1: Faringdon Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	16	32.7	41.4
Convenience Retail	6	12.2	8.6
A1 Services (2)	9	18.4	10.8
A2 Services	6	12.2	8.5
A3/A5	8	16.3	15.8
Vacant	4	8.2	13.7
Total	**49**	**100.0**	**100.0**

Source: Goad Plans
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

Consistent with its position in the shopping hierarchy, Faringdon has a relatively high proportion of convenience shops and non-retail services, and conversely a lower proportion of comparison shops.

Retailer Representation

Faringdon has a small selection of comparison shops (16), reflecting its role in the retail hierarchy in the District. Table C.2 provides a breakdown of comparison shop units by category. Many of the Goad comparison retailers are not represented and the choice of shops in other categories is limited to one or two shops.

However, Faringdon also includes a number of specialist comparison retailers, such as the piano shop, mobility shop and two wedding dress shops.

Table C.2: Faringdon Breakdown of Comparison Units

Type of Unit	Faringdon		% UK* Average
	Units	%	
Clothing and footwear	0	0.0	26.3
Furniture, carpets and textiles	1	6.9	8.4
Booksellers, arts, crafts and stationers	2	12.5	10.7
Electrical, gas, music and photography	1	6.9	9.4
DIY, hardware and homewares	2	12.5	6.1
China, glass, gifts and fancy goods	2	12.5	3.9
Cars, motorcycles and motor access.	0	0.0	2.9
Chemists, drug stores and opticians	2	12.5	9.3
Variety, department and catalogue	0	0.0	1.4
Florists, nurserymen and seedsmen	1	2.3	2.2
Toys, hobby, cycle and sport	0	0.0	5.4
Jewellers	2	12.5	4.9
Other comparison retailers	3	18.7	9.1
Total	**16**	**100.0**	**100.0**

Source: Goad Plans
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Figure C.2 GOAD Plan of Faringdon Town Centre

Service Uses

Faringdon has a limited range and choice of non-retail service uses (see Table C.3). Other uses within Faringdon include pubs and hotels, a post office and community halls.

Table C.3: Faringdon Analysis of Selected Service Uses

Type of Unit	Faringdon		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	8	47.1	45.2
Banks/other financial services	2	11.8	13.4
Estate agents/valuers	3	17.6	10.8
Travel agents	0	0.0	3.5
Hairdressers/beauty parlours	4	23.5	24.4
Laundries/dry cleaners	0	0.0	2.7
Total	**17**	**100.0**	**100.0**

Source: Goad May 2011 and NLP July 2012
** UK average for all town centres surveyed by Goad Plans (June 2012)*

Vacant Units

There were four vacant shop units within Faringdon at the time of the Goad survey (October 2011) a vacancy rate of 8.2%, which is significantly lower than the national average of 13.7%.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Faringdon. Nearly 59% indicated nothing would make them shop more often in Faringdon and nearly 26% indicated they didn't know, therefore around 85% did not suggest any improvements in Faringdon. Within the Faringdon zone (zone 6), the main answer given was more food supermarkets (31.0%), followed by 30.2% mentioning a better choice of shops in general, and 17.2% specifically mentioned more clothing shops. The next most suggested improvements (6.9% each) were more independent shops and more car parking. No other answer achieved more than 3%.

Summary of Faringdon's Strengths and Weaknesses

Strengths

- The centre has a mix of shops and services that meet day to day and local shopping needs.
- The Budgens store and small convenience units cater predominantly for top up food shopping.
- The centre has a low number of vacant units.
- The centre is compact for pedestrians.

- Overall the shopping environment is well maintained and pleasant.

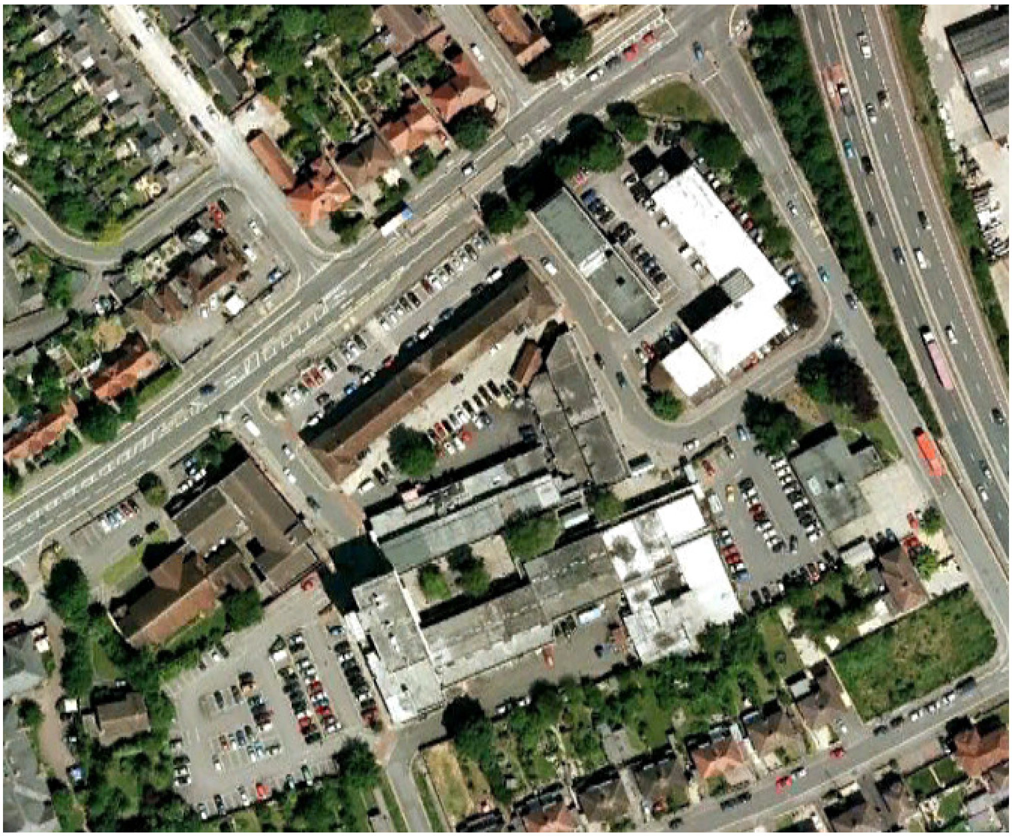
Weaknesses

- The range and choice of shops and services are very limited.
- The centre does not have a large food store capable of meeting all main and bulk food shopping needs in the town.
- Many shop units are small period buildings that do not meet the modern requirements of many operators.

D. Botley

Botley is a small district centre located on the outskirts of Oxford to the north east of the District.

Figure D.1 Aerial View of Botley District Centre



The key roles of Botley include:

- **convenience shopping**: Co-op, Iceland and Tesco Express stores supported by two newsagents, a butchers and delicatessen;
- **comparison shopping**: a limited range of comparison shops and predominantly independent traders serving day to day shopping needs. Lloyds chemist is the main national multiple.
- **services**: provides a range of services including a post office, banks, cafés, restaurants, takeaways, hairdressers, travel agents and bookmakers.
- **community facilities**: provides a range of community services including a vets and a library.

Mix of Uses and Occupier Representation

Botley has only 40 retail/service units and is slightly smaller than Faringdon in terms of the number of units. The diversity of uses present in Botley in terms of the number of units is set out in Table D.1, compared against the national average. Goad information is not available for Botley.

Table D.1: Botley Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	10	25.0	41.4
Convenience Retail	7	17.5	8.6
A1 Services (2)	8	20.0	10.8
A2 Services	7	17.5	8.5
A3/A5	5	12.5	15.8
Vacant	3	7.5	13.7
Total	**40**	**100.0**	**100.0**

Source: NLP October 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

Botley has a high proportion of convenience shops and non-retail services, and conversely a lower proportion of comparison shops, which is consistent with its role in the shopping hierarchy.

Retailer Representation

Botley has a small selection of comparison shops (10). Many of the Goad comparison retailers are not represented and the choice of shops is poor. Most of the comparison shops provide day to day goods only, ie. pharmaceuticals, florist, car accessories, charity shops, pet related goods and an optician, rather than higher order goods such as clothing.

Service Uses

Botley has a limited range and choice of non-retail service uses, including cafés, takeaways, funeral director, two banks and estate agents.

Vacant Units

There were three vacant shop units within Botley at the time of NLP's survey (October 2012) a vacancy rate of 7.5%, which is significantly lower than the national average of 13.7%.

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Botley. Over 60% indicated nothing would make them shop more often in Botley and over 23% indicated they did not know, therefore over 83% did not suggest any improvements in Botley. The main answer given in the Botley zone (zone 4) was a better choice of shops in general (32.7%). The next most suggested improvements (8.9% each) were better maintenance/cleanliness and more food supermarkets. In addition 6.9%

wanted better quality shops and 5.9% wanted more car parking. No other answer achieved more than 4%.

Summary of Botley's Strengths and Weaknesses

Strengths

- The centre has a mix of shops and services that meet day to day and local shopping needs.
- The Co-op, Iceland and Tesco Express stores cater predominantly for top up food shopping. The Co-op store acts as an important anchor attracting customers to the centre.
- The centre has a low number of vacant units.
- The centre is compact and predominantly pedestrianised.

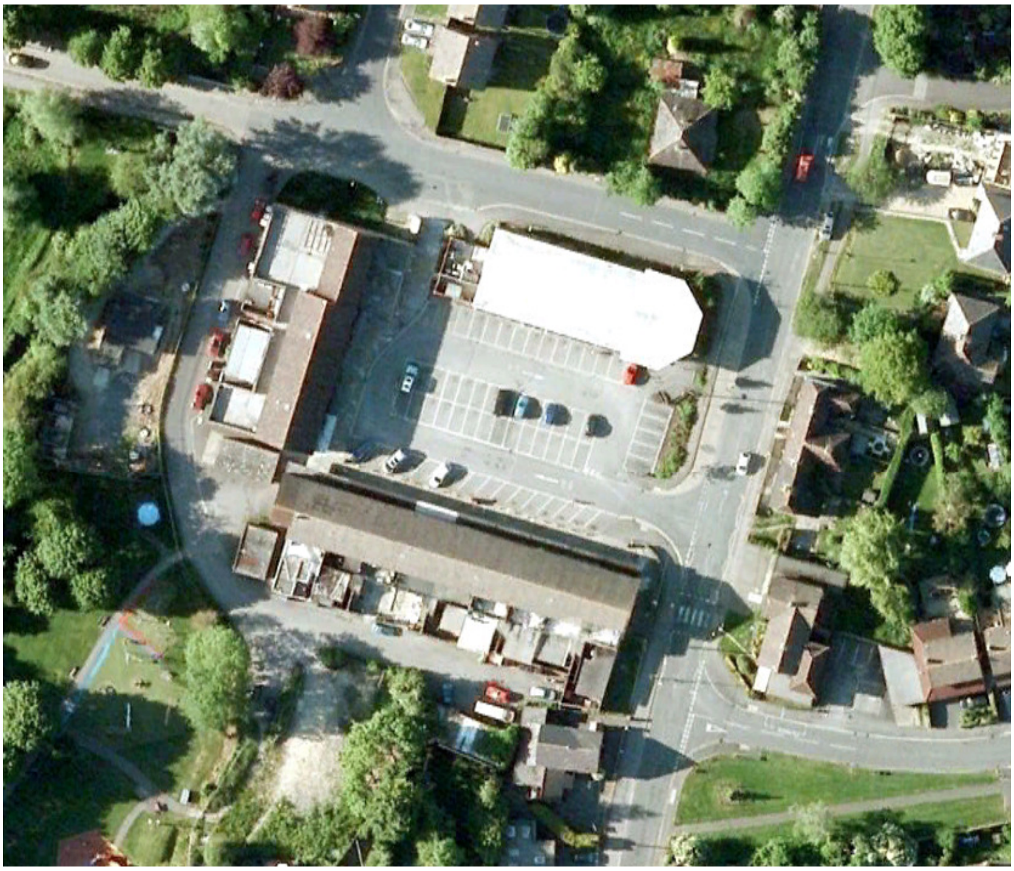
Weaknesses

- The range and choice of shops is services are very limited.
- The centre does not have a large food store capable of meeting all main and bulk food shopping needs.
- The provision of leisure and entertainment facilities other than restaurants and pubs is limited.
- The shopping environment is dated and relatively unattractive.

E. Grove

Grove is a small centre located to the north of Wantage. There are two shopping parades within Grove – Millbrook Square and Grovelands. Millbrook Square is the larger of the two centres. The Grovelands centre contains a small Co-op store and a limited number of commercial units, including a take away, newsagents and pet store. The health check below relates to the Millbrook Square centre.

Figure E.1 Aerial View of Grove Local Centre



The key roles of Grove include:

- **convenience shopping**: Tesco Express and McColls convenience store supported by a butcher, baker and off licence;
- **comparison shopping**: a limited range of comparison shops and predominantly independent traders serving day to day shopping needs eg. chemist, optician and hardware store;
- **services**: café, takeaway, dentist and dry cleaners.

Mix of Uses and Occupier Representation

Grove has only 14 retail/service units and is much smaller than Botley and Faringdon. The diversity of uses present is set out in Table E.1, compared against the national average. Goad information is not available for Grove.

Table E.1: Grove Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	4	28.6	41.4
Convenience Retail	5	35.7	8.6
A1 Services (2)	2	14.3	10.8
A2 Services	1	7.1	8.5
A3/A5	2	14.3	15.8
Vacant	0	0.0	13.7
Total	**14**	**100.0**	**100.0**

Source: NLP October 2012
(1) UK average for all town centres surveyed by Goad Plans (June 2012)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

Consistent with its local shopping role, Grove has a much higher proportion of convenience shops than the national average. This includes a Tesco Express.

Grove has only four comparison shops ie. a chemist, optician, hardware store and a charity shop. These uses are typically found in small neighbourhood or local centres.

Service Uses

Grove has only six non-retail service uses ie. a dentist, bank, dry cleaners, café, takeaway and funeral director. Again, these uses are typically found in small neighbourhood or local centres.

Vacant Units

There were no vacant shop units within Grove at the time of NLP's survey (October 2012).

Shopper Views

Respondents to the household survey were asked what, if anything, would make them shop more often in Grove. Over 66% indicated nothing would make them shop more often in Grove and over 27% indicated they did not know, therefore over 93% did not suggest any improvements in Grove. The main answer given (29 respondents) was a better choice of shops in general. The next most suggested improvement (five respondents) was better quality shops. No other answer achieved more than four respondents.

Summary of Grove's Strengths and Weaknesses

Strengths

- The centre has retail and service uses one would typically expect to find in a neighbourhood or local centre.
- The Tesco Express store caters for top up food shopping.
- The centre has no vacant units.
- The centre has convenient and free car parking.

Weaknesses

- The range and choice of shops and services is very limited.
- The shopping environment is dated and relatively unattractive.

Appendix 5 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the VOWH study area in September 2012. The study area was split into six zones, based on postcode sectors.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - Other non-food items (eg. books, CDs, DVDs, toys and gifts).

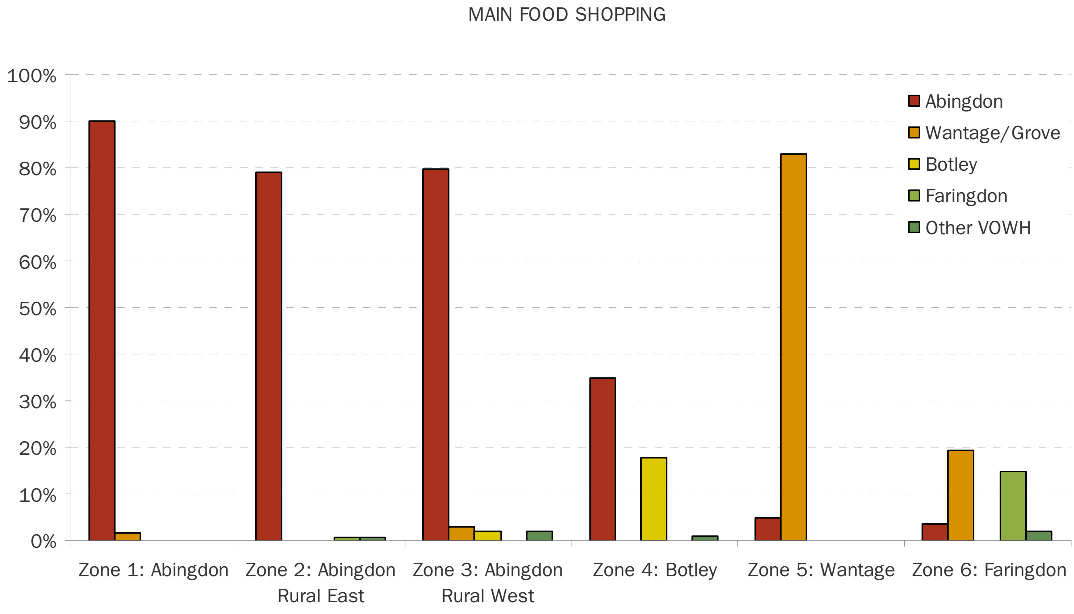
Main Food Shopping

Large food stores are the primary destination for main food shopping trip across the study area. Overall, the Tesco Extra food store at Abingdon was the most popular shopping destination (26.8%), followed by Sainsbury's store at Wantage (14.8%), Waitrose at Abingdon (14.2%), Waitrose in Wantage (6.1%) and Sainsbury's Oxford Road Swindon (5.1%) for the study area as a whole. Home shopping /the internet were used by 4.7% of respondents. The market share of main food shopping for each town in the VOWH is shown in the graph below.

Abingdon has a high market share of main food shopping trips within the town and the rural catchment area (zones 1 to 3). Wantage/Grove has a high share in its respective zone (zone 5). Botley and Faringdon have a relatively low market share within their respective zones.

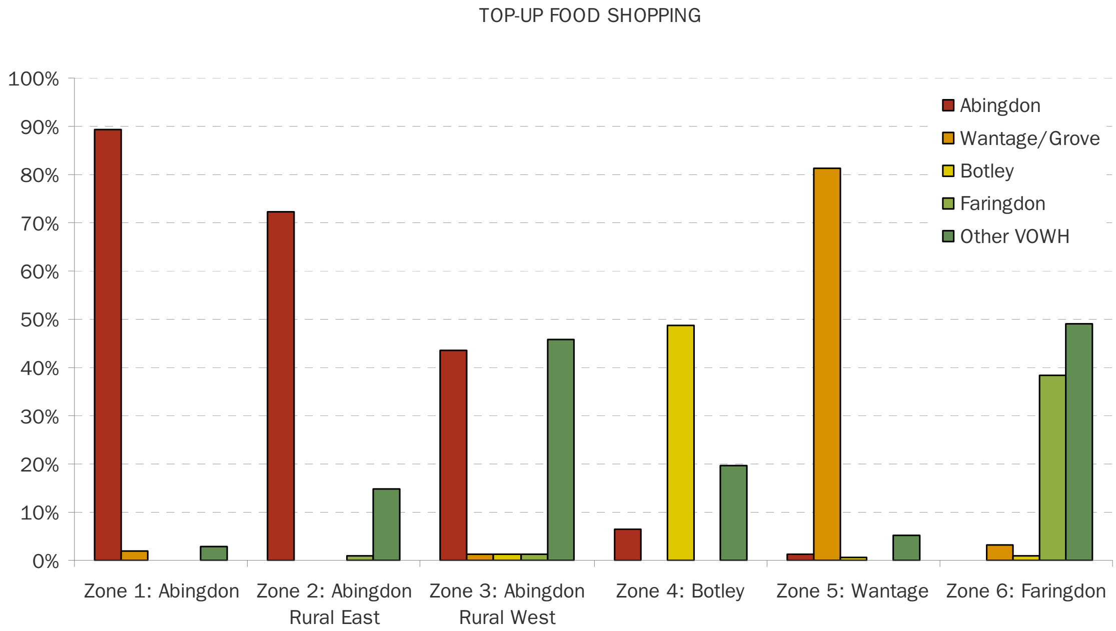
Mode of Travel for Main Food Shopping

In the whole study area, 79.9% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). A lower proportion walk to their main food shopping destination (6.6%) compared to the NLP average of 11.7%, and again a lower proportion of households travel by bus (3.6%) compared to the NLP averages derived from other surveys of 8.6%.



Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 81% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each town in the VOWH is shown in the graph below.



Botley, Faringdon and village shops in the District attract more top-up shopping trips, but large food stores in Abingdon and Wantage remain the dominant destinations.

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Oxford was the most popular destination with 26.1% of all respondents shopping there, followed by Abingdon (23.1%), Wantage (11.2%), Swindon (8.7%), Didcot (6.7%) and Newbury (3.7%). This demonstrates that the majority of non food shopping is carried outside the District.

Overall 6.2% of respondents buy most of their non-food shopping on the internet or have it delivered. The Abingdon Rural West zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (8.0%), followed by the Wantage zone (7.3%). The Botley zone undertakes the lowest proportion of non-food shopping on the internet/by mail order (4.0%).

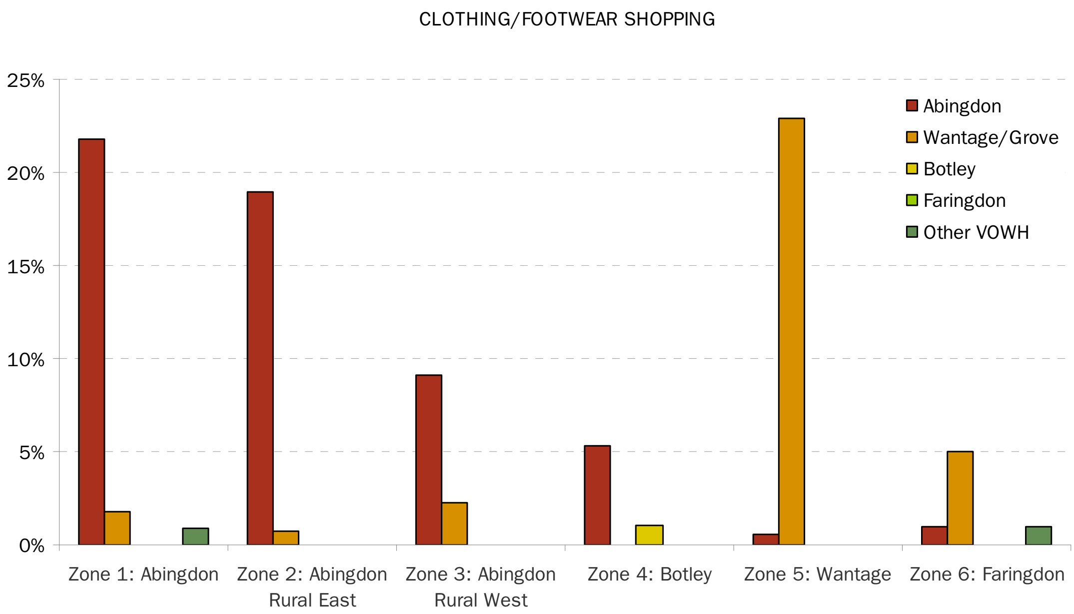
Mode of Travel for Non-Food Shopping

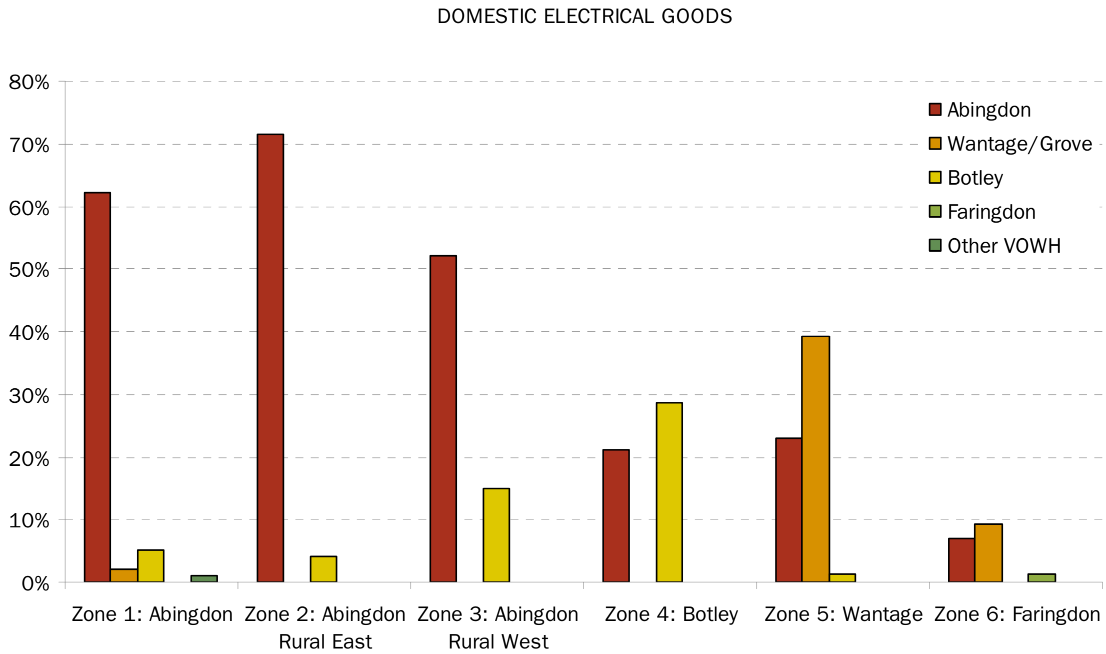
The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 69.7% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (13.1%) followed by walking (5.1%).

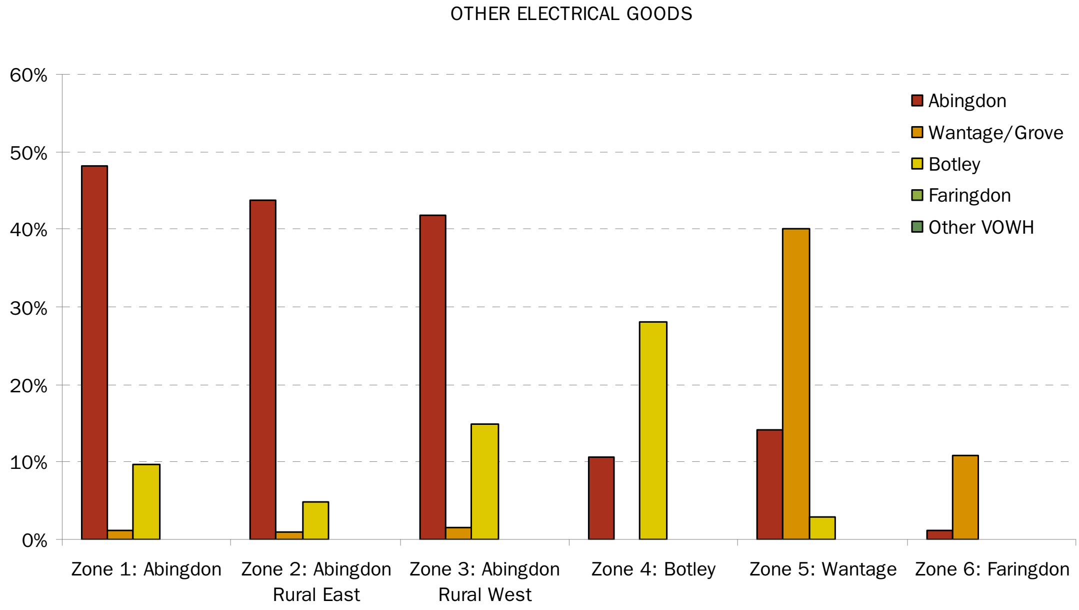
Non-Food Shopping Destinations

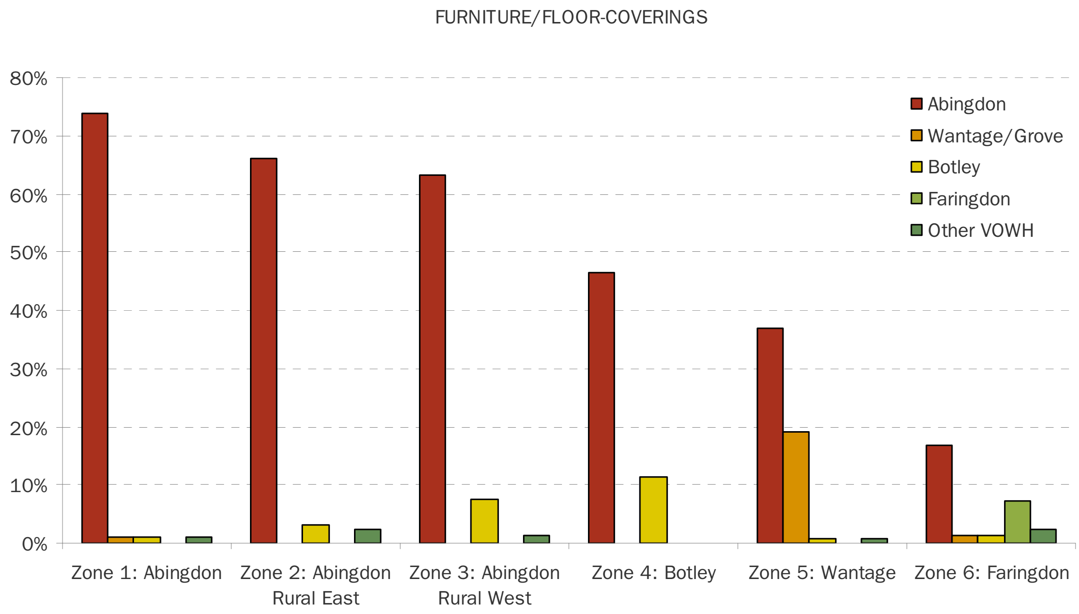
The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non-food goods category within each town in the VOWH is shown in the graphs overleaf.

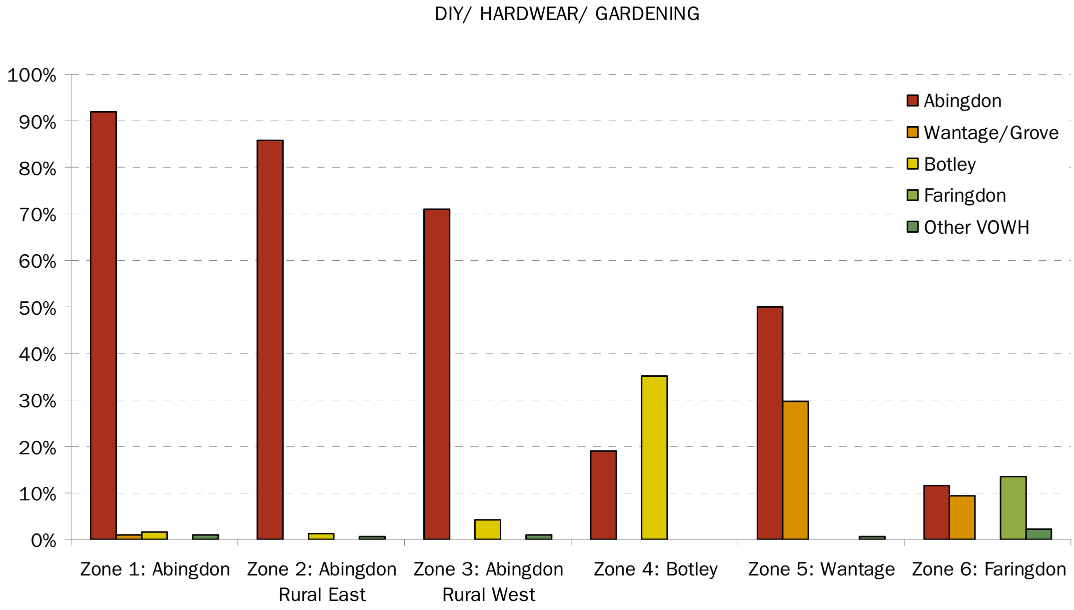
The figures for Abingdon include the Fairacres Retail Park and Botley include Botley Road Retail Park. Abingdon is the dominant destination within the District for all categories of goods. Only Abingdon and Wantage attract significant market shares of non-food expenditure. Botley (excluding Botley Road Retail Park and Homebase), Faringdon and other local facilities attract very low market shares.

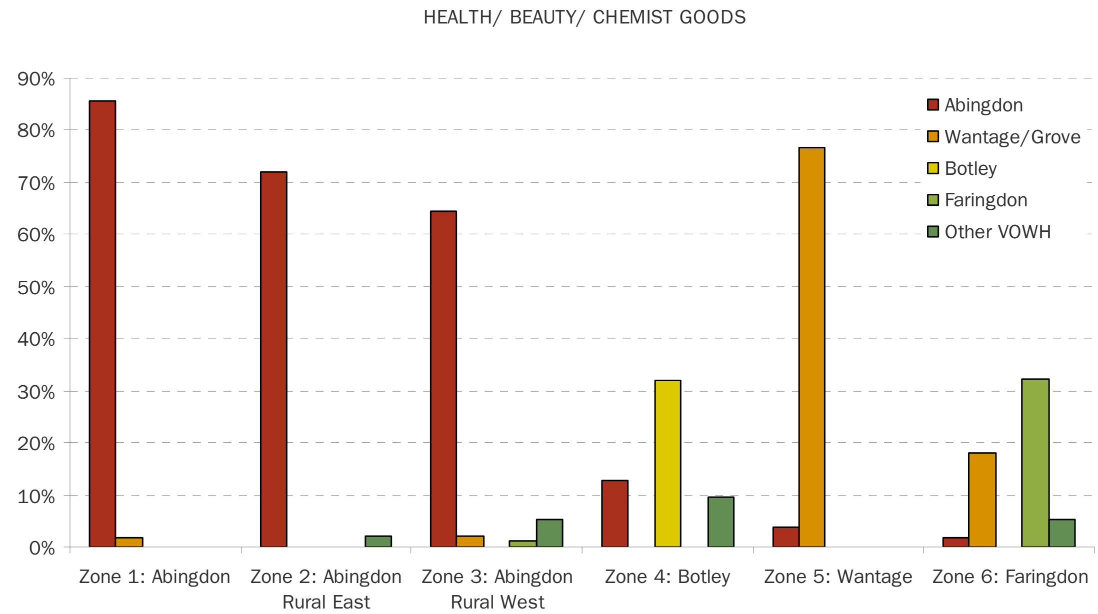

CLOTHING/FOOTWEAR SHOPPING
25%
20%
15%
10%
5%
0%
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon

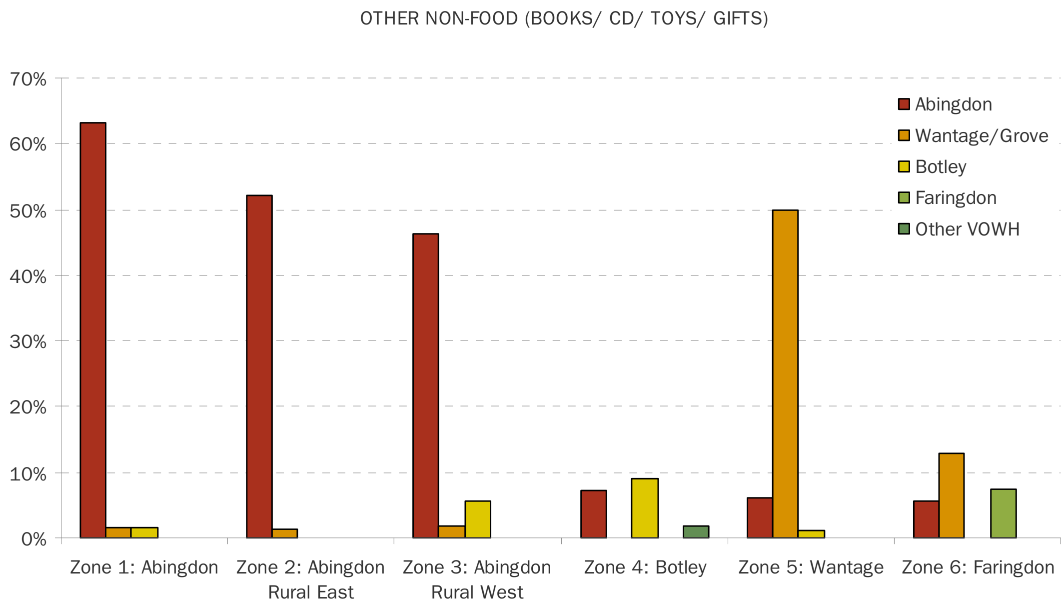

DOMESTIC ELECTRICAL GOODS
80%
70%
60%
50%
40%
30%
20%
10%
0%
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon


OTHER ELECTRICAL GOODS
60%
50%
40%
30%
20%
10%
0%
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon


FURNITURE/FLOOR-COVERINGS
80%
70%
60%
50%
40%
30%
20%
10%
0%
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon


DIY/ HARDWEAR/ GARDENING
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH


HEALTH/ BEAUTY/ CHEMIST GOODS
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Zone 1: Abingdon
Zone 2: Abingdon Rural East
Zone 3: Abingdon Rural West
Zone 4: Botley
Zone 5: Wantage
Zone 6: Faringdon
Abingdon
Wantage/Grove
Botley
Faringdon
Other VOWH



Internet Shopping

Respondents were asked what goods they regularly buy on the internet. Over 62% stated that they did not regularly buy items on the internet. The most popular response was “other” goods including books, CDs and toys (50.4%), followed by clothing and shoes (21.4%) and electrical goods including TV, Hi-Fi and computers (15.2%). Groceries were only 8.6%.

Leisure Activities

Cinema

Respondents were asked which cinema they or their family last visited. 54.9% of respondents indicated that they visit the cinema which was the third most popular leisure activity after restaurants and pubs/bars. This is slightly higher than NLP’s average derived from similar surveys across the Country (51.0%). Of those respondents that visited the cinema, across the study area as a whole, the most popular destination was Cineworld, Didcot (36.9%) followed by the Vue Cinema, Oxford (34.6%). The Empire Cinema in Swindon was the most popular destination in the Faringdon zone..

Theatre

54.8% of respondents indicated that they visited theatres, and this is the fourth most popular leisure activity. This figure is higher than NLP’s average for other surveys of 42.5% and this high level of participation is likely to be due to the number of facilities in close proximity to the study area. When asked where they had lasted visited the theatre, the New Theatre Oxford (44.5%) and The Oxford Playhouse (20.1%) were the most popular locations. Other responses included London (16.4%) and Swindon (2.5%).

Pubs/Bars

The household survey asked respondents if and where they or their family last visited a pub/bar and 58.3% of respondents indicated that they visited pubs/bars. This is higher than the NLP average from other surveys (47.5%) Overall, Abingdon (28.1%), Wantage (12.7%) and Oxford (10.3%) where the most popular destinations. However, most people generally tended to visit pubs and bars according with the closest main centre within each zone. For example, out of the 28.1% of people who visited a pub/bar in Abingdon, 95% of those people came from the Abingdon zones (zones 1, 2 and 3), and of the 12.7% visiting Wantage, 93% of people came from the Wantage zone (zone 5).

Restaurants

Overall 78% of respondents indicated they visit restaurants which is the most popular leisure activity, and this is higher than the NLP average for other surveys (67.9%). Of all the respondents who visited restaurants, Abingdon attracted the highest proportion of respondents (27.3%) followed by Oxford (21.9%) and Wantage (10.1%).

Nightclubs

Only 6% of respondents indicated that they had visited nightclubs, which makes it the second least popular leisure activity. This participation rate is lower than figure derived by NLP average from other similar surveys of 9.9%. The main location for respondents who last visited nightclubs in the study area as a whole is Oxford (53.1%), followed by Wantage (26.5%), however, the sample of nightclub visitors within each zone is relatively small.

Bingo

Bingo facilities were visited by just 4.8% of respondents and this is the least popular leisure activity. This figure is slightly below the NLP average participation rate of 5.1% as derived from other similar surveys. The sample of bingo visitors within each zone is again relatively small. The New Coronet Bingo Club in Didcot (31.6%) was the most popular place respondents went to play bingo followed by the Gala Club in Oxford (23.7%) and the Gala Club in Swindon (21.1%).

Health and Fitness Clubs

32.9% of respondents indicated their household visited health clubs/gyms, which is higher than the NLP average for other surveys (25.6%). The main health club and gym destinations for respondents were facilities in Abingdon (47.2%) and Wantage (12.9%).

Tenpin Bowling

Overall 24.4% of respondents indicated their household visit tenpin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are Bowlplex, Oxford (76.9%) and Tenpin, Swindon (12.3%).

Art Galleries/Museums

Art Galleries/Museums were visited by 53.4% of respondents. The main attraction which people last chose to visit was the Ashmolean Museum in Oxford (43.6%) followed by London (15.5%) and the Pitt Rivers Museum in Oxford (8.7%).

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