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South Oxfordshire District Retail Needs Update 2017

GVA for South Oxfordshire District Council
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For and on behalf of GVA Grimley Limited

1. Introduction & structure of report

- 1.1 GVA has been instructed by South Oxfordshire District Council (SODC) to provide an update of the 'need' for new retail floorspace in South Oxfordshire District which the Council will need to plan for over its new Local Plan period to 2033. This Retail Needs Update (RNU) follows on from the publication of the South Oxfordshire Retail and Leisure Needs Assessment 2016 (SORLNA), which was published in May 2016, and also prepared by GVA. Subsequent to the publication of the SORLNA, SODC, as part of the preparation of its new Local Plan, has confirmed its key strategic locations for housing growth, and accordingly has requested an update to the retail capacity forecasts identified in the SORLNA, in order to ensure that the needs of the new residential populations are fully met. Both this RNU and the SORLNA will form part of the evidence base for SODC's new Local Plan.
- 1.2 Whereas the SORLNA identified the retail capacity forecasts for the District over the period to 2031, in order to ensure consistency with SODC's new Local Plan, this RNU extends the period of assessment to 2033. However, it is recommended that capacity forecasts beyond the next ten years (i.e. beyond 2027) are considered indicative, and should be further reviewed over the course of the new Local Plan period. This is particularly important giving the changes in comparison goods shopping which are expected to come forward both within the District (as a consequence of the development of Orchard Centre Phase II in Didcot) and in competing centres surrounding the District (most notably the development of Westgate Oxford) In common with the SORLNA, the capacity forecasts set out in this RNU are split between convenience (food) floorspace and comparison (non-food) floorspace.
- 1.3 The scope of our instruction extends solely to providing an update to the District's retail need forecasts; all other elements of the SORLNA have not been updated. This includes the performance assessment of the District's four market towns (Didcot, Henley-on-Thames, Thame and Wallingford), the assessment of commercial leisure needs, and the strategic recommendations which we have recommended SODC carry forward into their new Local Plan. As such, it is recommended this RNU is considered an addendum to the SORLNA, and should be read alongside the main report.
- 1.4 The remainder of this RNU is structured as follows:
- **Section 2** sets out a brief update in the Council's development plan since the publication of the SORLNA, including identification of the strategic growth locations in South Oxfordshire District;
 - **Section 3** provides a brief update of trends in the retail and leisure sector since the publication of the SORLNA;
 - **Section 4** summarises the key findings of the SORLNA;
 - **Section 5** discusses the key inputs into the updated need forecasts, including new population forecasts, expenditure growth rates, and 'special forms of trading' such as online shopping;
 - **Section 6** provides updated quantitative need forecasts for the District over the period to 2033; and
 - **Section 7** sets out conclusions and updates relevant strategic recommendations for the District based on the findings of the updated capacity forecasts.

2. Policy update

- 2.1 In this section, we set out an update to the development plan policy position in South Oxfordshire District subsequent to the SORLNA; it should be read alongside the equivalent section in the SORLNA. This section of the RNU has been prepared in conjunction with officers at SODC.
- 2.2 The South Oxfordshire Core Strategy (adopted December 2012), together with relevant 'saved policies' from the Local Plan 2011, remains the extant development plan document for the District. However as mentioned in the previous section, SODC are preparing a new local plan called the Local Plan 2033. This will replace the existing Core Strategy and saved policies. The emerging local plan previously ran until 2031 but to ensure the plan, once adopted, has a 15 year timeframe, it has now been extended to run until 2033. It is expected that the Local Plan 2033 will be adopted in 2018.
- 2.3 The Local Plan has been through four consultation stages to date, the latest being a second Preferred Options document, published in March 2017. This provides the broad framework for growth with the focus for major growth remaining in the Science Vale area including Didcot.
- 2.4 The level of development planned for in the Local Plan 2033 is at least 17,500 homes to meet the needs of the district. An additional 3,750 new homes will be provided to help meet Oxford City's unmet need. Provision has already been made for around 12,000 homes through allocations in the adopted Core Strategy, commitments in made neighbourhood plans, and through the granting of planning permissions.
- 2.5 To meet this need strategic allocations are proposed at four locations in the district, with the remaining growth to be delivered primarily through neighbourhood plans in towns and larger villages, based on the settlement hierarchy. The four strategic allocations are at: **Berinsfield (up to 2,100 homes), Culham (3,500 homes), Chalgrove (3,000 homes) and Wheatley (300 homes).**
- 2.6 In the market towns it is proposed that they deliver an additional 15% growth of housing stock (at 2011). This will be delivered through their respective neighbourhood plans. On this basis the following number of dwellings are expected to be built in the plan period in the market towns:

Location	No. of dwellings
Thame	452
Henley	677
Wallingford	226
Total	1,355

- 2.7 The larger villages combined are expected to deliver a minimum of 1,122 homes over the plan period. This is based on accommodating an additional 15 percent growth of housing stock. The larger villages of Berinsfield, Chalgrove and Wheatley are not expected to deliver an additional 15 percent as there are proposed strategic allocations at these locations. In Benson and Chinnor a number of planning appeals

have been allowed that already meet the 15 percent growth requirement. The remaining larger villages are expected to deliver the following number of dwellings:

Location	No. of dwellings
Cholsey	135
Crowmarsh Gifford	134
Goring	251
Nettlebed	60
Sonning Common	169
Watlington	238
Woodcote	135
Total	1,122

- 2.8 With the exception of Nettlebed, it is expected that these will be delivered through neighbourhood plans.

Didcot Garden Town

- 2.9 A Didcot Garden Town proposed Delivery Plan is being prepared with consultation of the Plan running over June and July 2017. The plan proposes significant new public open spaces, leisure facilities, schools, health centres and an upgrade to the station with improved access to the railway museum. Infrastructure, such as roads, cycle paths and utilities are planned alongside a mix of affordable and private rented homes. Some expansions to Didcot have been approved and are already underway, such as Phase II of the Orchard Centre in Didcot town centre. This expansion forms part of wider plans to transform Didcot into a garden town to accommodate 16,000 new homes and supporting 20,000 new jobs in the Science Vale area over the next two decades.

Neighbourhood Plans

- 2.10 To date there are in the region of 40 neighbourhood plans being prepared across South Oxfordshire, with four already 'made': Henley-Harspden, Thame, Sonning Common and Woodcote.

3. Update to market trends

3.1 In the SORLNA, we identified a number of key changes to and challenges facing the retail sector and the role and function of town centres which had emerged since the Council's preceding retail evidence base study, which was completed in 2009. These changes and challenges included:

- Changes in the economic climate;
- Changing retailer space requirements;
- Online shopping;
- Changes in the convenience goods sector;
- The changing role of the town centre*;
- Out-of-centre retailing*;
- The role of commercial leisure*.

3.2 We provide a brief update to these key trends, where relevant, below (for those marked *, we have not provided an updated discussion, and therefore consideration should also be given to Section 3 of the SORLNA where these trends are discussed in full). In summary, however, we repeat the conclusions of the SORLNA that it will be important for District's network of town centres to be well-positioned to adapt to ongoing changes in the retail and leisure sector which will come forward over the Council's new Local Plan period, and to reaffirm their unique selling points which differentiate their retail offer from the nearby higher-order centres, rather than trying to directly compete with them. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.

The economic climate

3.3 Whilst SODC's 2009 Retail Capacity Study (which preceded the SORLNA) was published as the UK economy entered a period of recession, by the time of publication of the SORLNA, the economy had exited recession and returned to growth. A strong economic 'upswing' took place in early 2013, and indications from Experian at the time of the publication of the SORLNA was that consumer and investor confidence was tentatively beginning to return.

3.4 More recent guidance which has been published by Experian presents a more cautious narrative, partly as a consequence of the referendum vote in favour of leaving the European Union, which has resulted in a more uncertain economic outlook. In their Retail Planner Briefing Note (November 2016), Experian comment that:

'The UK recovery has continued into 2016. However, there has been some moderation to the pace of upswing since 2014... the recovery has become increasingly reliant on consumer spending as investment has slowed. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year'.

3.5 In terms of future projections of consumer spending, Experian state that:

'We expect consumer spending to begin to weaken over 2017, suffering from higher inflation in the wake of the steep fall in the sterling's exchange rate since the referendum. Wage growth remains modest and is likely to be overtaken by higher inflation, which in turn will constrain spending power'.

- 3.6 Experian conclude that *'the outlook for the next two years for the UK economy has weakened significantly following the Brexit vote'*. In the medium term, Experian consider that *'the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude, and in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans'*.

Changing retailer space requirements

- 3.7 The SORLNA commented that:

'During the recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites'.

- 3.8 Evidence from the market is that this trend is continuing, although, with the exception of the high-profile collapse of BHS in 2016, the number of retailers entering administration has generally decreased over the last few years since the height of the economic downturn.
- 3.9 Retailers continue to seek representation in flagship locations, and as the SORLNA identified, South Oxfordshire falls within the catchment of Oxford and Reading. Since completion of the SORLNA, work has continued to progress on Westgate Oxford, and the scheme is now set to open in October 2017. The 800,000 sq.ft retail-led mixed use development will have a 142,000 sq.ft flagship John Lewis as its anchor department store, alongside space for 125 shops, restaurants, cafés and leisure uses including a boutique 5- screen Curzon Cinema, set in a mix of covered streets, arcades, lanes and squares. Delivering a substantial uplift to the attractiveness of Oxford as a shopping destination, the scheme has, subsequent to the SORLNA, confirmed lettings to a wide range of operators including a mixture of high street multiples, lifestyle stores and higher-end fashion brands. Examples of retailers who have recently been confirmed for the scheme include premium fashion brands such as Michael Kors, Hugo Boss, Ted Baker, Tommy Hilfiger and Calvin Klein; footwear retailers including Timberland and Vans, and beauty/lifestyle retailers such as Neal's Yard Remedies and Oliver Bonas.
- 3.10 This 'polarisation' of comparison goods retailers to larger centres is likely to ensure that centres such as Oxford and Reading will continue to exert a significant influence over the non-food shopping patterns of residents over the course of the new Local Plan period. It means that the Borough's own network of centres will need to position themselves with a different offer that complements that of the higher order centres.

Online shopping and 'click & collect'

- 3.11 The SORNLA identified that the online shopping population is reaching saturation, and accordingly any future growth is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The SORNLA also identified that the boundaries between physical 'bricks and mortar' retail and online retail are becoming increasingly blurred, with developments such as 'click and collect' now forming an important component of the online shopping model. The role of 'click and collect' has continued to grow since the SORNLA; Recent data from industry monitor Verdict suggests that click & collect expenditure is expected to grow by 64% between 2016 and 2021, compared to an online growth of 38% over the same period. Verdict's study forecasts that click & collect will grow across all categories, but will particularly be driven by the clothing and footwear sector.
- 3.12 The popularity of click & collect is clearly an important opportunity for town centres, as it can act as a footfall generator in its own right. Verdict identify that 39% of consumers make an additional purchase when collecting an item from a store, up from 29% in 2013. The average amount spent on additional in-store purchases is £13. The majority of national retailers now operate click and collect services.
- 3.13 Experian have, subsequent to the SORNLA, released revised estimates of the proportion of total spend on comparison and convenience goods which will be spent on 'special forms of trading' such as online shopping, and we discuss these further in **Section 5**.

The convenience goods sector

- 3.14 Industry data providers Mintel have recently described the changes in convenience goods shopping as 'the trends of the whole of the post-war era [being] reversed', identifying the following key changes in food shopping behaviour:
- Superstores are losing market share;
 - Convenience [small-format] stores of the market leaders and the Co-op are gaining share;
 - Aldi and Lidl are achieving double-digit growth;
 - Other convenience stores are losing share;
 - Certain retailers classified as non-food retailers, notably M&S and the non-food discounters such as Home Bargains and Poundland and increasing their share of food spending; and
 - Online demand is growing.
- 3.15 Mintel consider there to be two reasons behind these trends, which they consider started in 2012. Firstly, Mintel consider that 'There has been a shift of population back into inner cities and much of it into rented accommodation. These people are much more likely to shop on an 'as needs' basis and to eat out. So the majority of their food retail demand goes to convenience stores. This is also apparent in the growth of craft bakers and the development of specialist delis'. Secondly, Mintel note that 'Aldi and Lidl have transformed their offer, expanding their ranges, strengthening their fresh foods and adding premium lines. We think this has led to a step change in their performance and that we are approaching a time when growth will be primarily driven by store openings'.

- 3.16 The increased popularity of 'as needs' shopping is behind the growth of small-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose, with this trend particularly apparent in urban areas. The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reigning in substantial expansion of their estates, particularly in terms of larger-format superstores. Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and both Aldi and Lidl are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. A new Aldi store opened in Didcot in 2015.
- 3.17 Notwithstanding the trends discussed above, over 50% of food shopping is still undertaken in larger-format supermarkets — and if shopping in Aldi and Lidl stores is included this figure rises to over two-thirds of all food shopping (see Figure 3.3). There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, but generally speaking operators are opening smaller format stores than has been the case in recent years.

4. Summary of key findings from SORLNA

- 4.1 The SORLNA set out a comprehensive assessment of the performance of the District's network of four town centres - Didcot, Henley-on-Thames, Thame and Wallingford. The study found the centres to be exhibiting generally positive signs of 'vitality and viability' when assessed against town centre performance indicators set out in the Government's Planning Practice Guidance. The SORLNA also set out a strategy for the future role and function of the four centres. We provide a brief summary of this below.

Didcot

- 4.2 Didcot was identified to be performing 'reasonably well' with a good range of national retailers, albeit with an offer pitched towards the middle to lower end of the market. The focus of the retail offer in the town centre is in the pedestrianised Orchard Shopping Centre and adjacent large Sainsbury's store. The attraction of a broader retail mix was identified as being important to enhancing the vitality and viability of the centre in the long term. The presence of the Sainsbury's store in the town centre means the centre has important convenience as well as comparison shopping functions, as well as an important leisure function through developments such as the Cornerstone arts centre and Cineworld cinema.
- 4.3 Didcot town centre also contains the only large-scale opportunity site of any centres in the District, which is expected to come forward as a Phase II development of the Orchard Shopping Centre. At the time of preparation of the SORLNA, planning permission had been granted for this development, which will, if implemented, add approximately 15,000 sq.m of retail and commercial leisure floorspace to the existing town centre offer. The extension is expected to be anchored by an M&S Food store, plus a further 23 shops and six restaurants and cafes and a gym, as well as investment in the public realm and additional car parking facilities. The scheme has been granted outline planning permission, and benefits from policy support in SODC's adopted Core Strategy.
- 4.4 The SORLNA recommended that the majority of the comparison goods floorspace requirement which the study identified for the District (discussed below) should be accommodated in Didcot town centre, reflecting the aforementioned Core Strategy allocation and in order to reinforce its role and function as the highest-order centre in the District.

Henley-on-Thames

- 4.5 Henley-on-Thames is a strong-performing attractive and historic town centre. To a greater extent than the other centres in the District, it performs a dual function, both as a shopping and services centre for residents in the south-eastern part of the District, and also as a tourism destination, chiefly focussed around events such as the annual Royal Regatta and the Henley Festival of Music and Arts. Almost half of the users of Henley town centre are from outside the South Oxfordshire area. The retail offer is anchored by a Waitrose supermarket, which also acts as a generator of linked trips to other businesses and services in the centre. The store is trading particularly strongly. The comparison goods offer is also towards the upmarket end of the scale, with retailers such as Fat Face, White Stuff, Space NK

Apothecary, Joules, Cargo and Laura Ashley, as well as a number of specialist art dealers and interior design shops. There is a limited range of more typical 'high street' retailers such as Boots and WH Smith also present in the centre which are likely to ensure that some (but possibly not all) 'day-to-day' shopping needs are being met. The proportion of comparison goods expenditure which is retained by Henley from its local catchment was found to have increased from 29% to 42%, suggesting the centre's offer has improved in recent years. The centre also has a particularly strong range of restaurants and coffee shops in the centre, reflective of both its affluent catchment and its tourism role.

- 4.6 The SORLNA does not envisage Henley's role and function to substantially alter over the course of the new Local Plan period, although there is an opportunity site in the town centre (the former Empstead Works site) which, if redeveloped, could act as a natural extension to the town centre and accommodate a limited quantum of retail floorspace. The site is allocated for retail development in the Henley-Harpsden Neighbourhood Plan. The SORNLA concluded that Henley is likely to continue to compete for comparison goods expenditure with Reading - although the offers of the two centres are markedly different. Henley should therefore not seek to take on Reading but develop a complementary offer which takes full advantage of its historical setting and important tourist role.

Thame

- 4.7 The SORLNA found Thame to be performing 'generally well' as a town centre, with a particularly strong convenience goods function. As with Henley, a Waitrose store forms the 'anchor' to the wider town centre retail offer, and evidence from the study identified this store to be trading strongly. There is also a well-established and diverse independent convenience goods sector which plays an important contribution to the overall vitality and viability of the centre. The comparison goods offer is, like Henley, pitched towards the upper end of the market, with retailers such as The Aga Shop and Cargo trading alongside more day-to-day operators such as Boots and Robert Dyas. Thame also benefits from a reasonable selection of cafes and restaurants, but scope exists for further enhancement of provision in this respect.
- 4.8 With the Cattle Market site on North Street (Core Strategy allocation THA1 / Neighbourhood Plan allocation WS14), the town centre benefits from a prominent opportunity site within close proximity to the existing retail offer, which if developed, provides the opportunity for further enhancement of the retail and leisure offer of the town. The Thame Neighbourhood Plan and the adopted Core Strategy both recognise the opportunity which the site presents, and advocate its comprehensive redevelopment for a mixture of uses, to include retail, leisure, residential and office uses. Securing the comprehensive redevelopment of this site should remain a priority for the Council.
- 4.9 At the time of preparation of the SORLNA, there was an undetermined application for a Tesco foodstore at the DAF Trucks site on the outskirts of Thame which would, if approved and subsequently developed, have met the qualitative need for an additional 'main' foodstore to serve Thame, however this application was subsequently refused planning permission in July 2016. There therefore remains a qualitative need for additional foodstore provision in Thame.
- 4.10 Overall, the SORLNA recommended that the strategy for Thame town centre should be one of consolidation and strengthening of the existing retail and leisure, as opposed to the delivery of significant

quanta of new comparison goods floorspace. Such a strategy is considered to be the best approach for ensuring that the existing historic centre remains a vital and viable retail destination over the course of the Plan period.

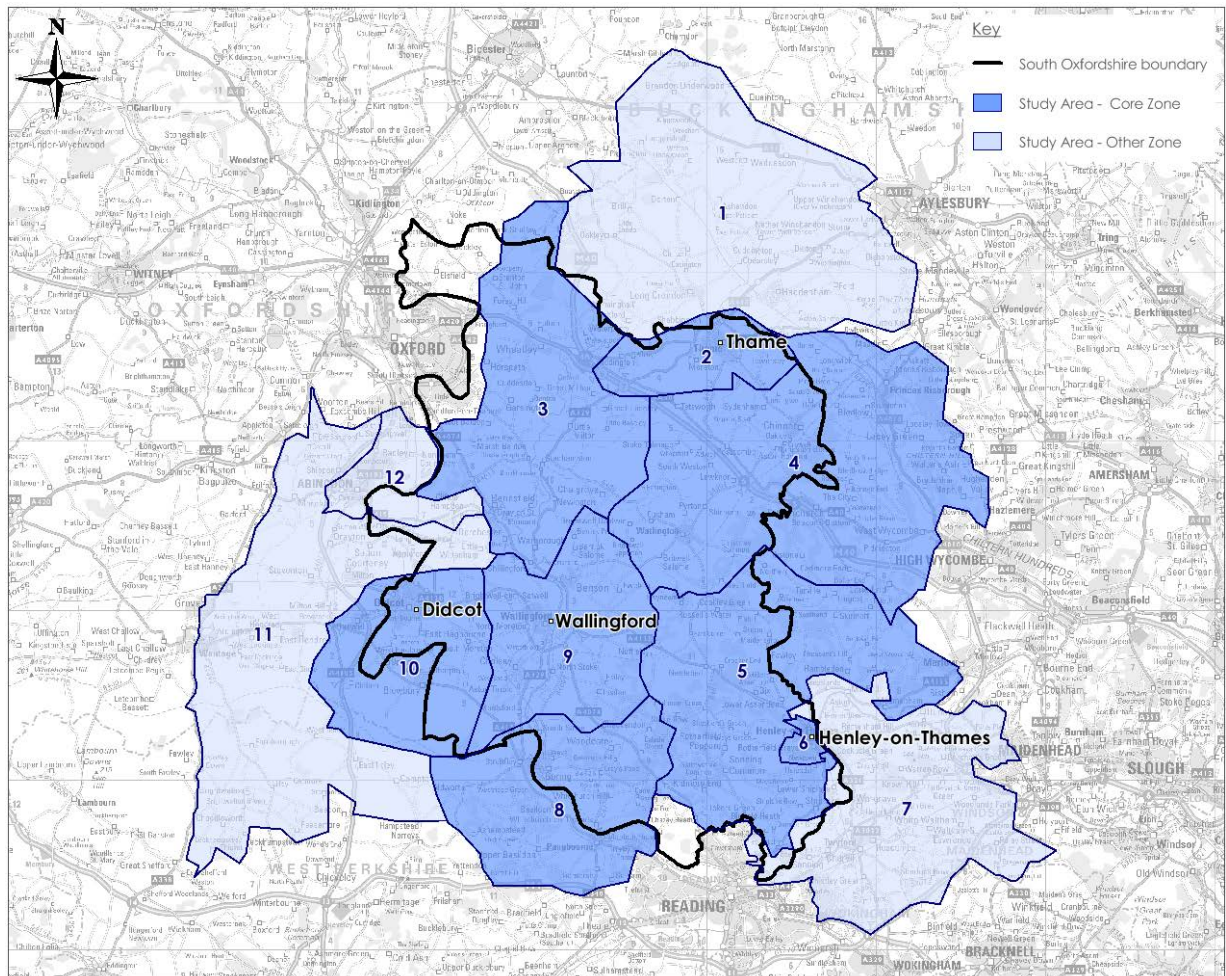
Wallingford

- 4.11 Wallingford was also considered to exhibit generally positive signs of vitality and viability. The compact and attractive town centre has a more localised offer than any of the other centres, and the offer is more orientated towards meeting convenience goods and local services needs as opposed to comparison goods shopping. There is a strong focus on independent retailers in the centre, although the Waitrose store at the junction of High Street / St Martin's Street towards the northern end of the town centre is unquestionably the 'anchor' store in the town centre. The former Waitrose store at the southern end of the town centre (which arose as a result of Waitrose relocating into their current, larger store) remains vacant although planning permission has been granted for its redevelopment which will include two small retail units on the ground floor. The SORNLA identified concerns that the non-food retail offer in the centre has begun to stagnate in the centre, with the town attracting a lower non-food market share from its local catchment than was the case at the time of the 2009 Study.
- 4.12 At the time of preparation of the SORNLA, planning permission had been granted for a new foodstore on the edge of Wallingford, at Hithercroft Industrial Estate, however the proposed operator of the store, Morrisons, had withdrawn from the site. The planning permission for this site has now lapsed. The SORNLA confirmed that should this permission not be implemented, there remains an outstanding qualitative need for additional convenience goods provision in Wallingford.
- 4.13 The SORNLA recommended that Wallingford should continue to be a focus for local convenience, comparison and day-to-day services, and new retail and leisure floorspace within or outside the town centre (beyond commitments) should be resisted. The strategy emphasis should be on ensuring Wallingford remains an attractive and pleasant shopping destination, with a continued focus on meeting local shopping needs. Such a strategy will also support the Council's ambitions to consolidate Didcot's role in being the principal comparison goods shopping destination in the north of the District.

Household telephone survey and shopping patterns

- 4.14 Alongside the performance assessment of the four largest centres in the Borough (discussed above), the SORNLA drew on findings of a household telephone survey undertaken in support of the study, which established where residents across the survey area (which comprised the District) in its entirety plus surrounding areas in which residents may look towards locations in the Borough for their shopping needs. The survey area was split into 12 survey zones, in order to enable patterns of shopping at the local level to be accurately captured.
- 4.15 A plan showing the survey area is reproduced at **Figure 4.1.** below. Zones 2, 3, 4, 5, 6, 8, 9 and 10 cover South Oxfordshire and are referred to in the SORNLA as 'core zones'. Thame falls within zone 2; Henley within zone 6; Wallingford within zone 9; and Didcot within zone 10. The remaining zones – 1, 7, 11 and 12 – fall outside the District boundary but residents in these zones benefit from easy access to one or more of the District's centres.

Figure 4.1: Survey zones



4.16 The results of the household telephone survey were also used to identify the proportion of expenditure available to residents on food and non-food shopping which are retained by centres in the District. This in turns informs the forecasts of retail 'need' which form one of the key outputs of the SORLNA. The household survey results identified that:

- 26.9% of available comparison goods expenditure is retained by the 'core zones'.
- Didcot has the highest comparison goods turnover of any centre in the District, with a turnover of £96.20m at 2014, followed by Henley (£46.21m), Thame (£32.24m) and Wallingford (£18.62m) (figures exclude 'inflow' from outside the survey area).
- Most residents look outside the District for their comparison goods shopping, with the most popular destinations being Reading town centre (comparison goods turnover of £243.10m at 2014, of which £134.23m from the core zones), followed by Oxford city centre (£116.63m at 2014, of which £61.52m from the core zones) and High Wycombe (£112.02m at 2014, of which £102.82m from the core zones). This reflects the trends discussed in the previous section regarding the 'polarisation' of comparison goods shopping to larger/higher-order centres.

- 53.3% of available convenience goods expenditure is retained by the 'core zones', with the rest of the expenditure spent at stores in Abingdon, Twyford, Princes Risborough and High Wycombe, and other destinations outside the study area.
- A number of foodstores in the District are trading at above company average levels or 'over-trading'. These include the out-of-centre Tesco stores in Didcot and Henley, and the in-centre Waitrose stores in Henley, Thame and Wallingford. However some stores were found to be trading at below company average levels, including the in-centre Sainsbury's store in Didcot and in-centre Sainsbury's Local and Co-Op stores in Thame.
- The over-trading of the Tesco store in Didcot was considered likely to be reduced by the now-trading Aldi store and the extant consent for new foodstores at Orchard Centre Phase II (M&S Foodhall) and Great Western Park (unknown operator).

The 'need' for new floorspace

- 4.17 Having regard to the population and expenditure growth which the SORNLA forecast to come forward, the following levels of 'need' for new comparison goods and convenience goods floorspace were identified by the SORNLA:
- Up to 2,100 sq.m net additional convenience goods floorspace by 2019, increasing to up to 3,700 sq.m net additional convenience goods floorspace by 2031;
 - Up to 2,300 sq.m net additional comparison goods floorspace by 2019, increasing to up to 16,300 sq.m net additional comparison goods floorspace by 2031.
- 4.18 The capacity projections were based on current market shares, identifying capacity for new floorspace based on current estimates of population and expenditure growth provided by Experian. The SORNLA made it clear that capacity projections should be refreshed once a clear picture of the level and trajectory of planned housing growth which is expected to come forward in the District has been established, and now this work has taken place an updated set of comparison and convenience goods need figures can be identified.
- 4.19 The SORNLA also advised that if the Orchard Centre Phase II development is constructed in line with the current outline permission, this could account for approximately 7,700 sq.m of comparison goods floorspace. Therefore, if this development materialises, the Council would not need to plan for any additional comparison goods floorspace in the District until the end of its Plan period (i.e. post-2024).
- 4.20 An update of the above capacity forecasts is set out in **Section 6** of this RNU.

5. Updated inputs into the quantitative need assessment

- 5.1 In this section we set out a discussion of changes to the key technical inputs into the quantitative need forecasts for South Oxfordshire District. The updated need forecasts then follow in Section 6.

Household telephone survey

- 5.2 We continue to use the findings of the household telephone survey which was undertaken by NEMS Market Research in support of the SORLNA to inform our updated capacity forecasts. A plan showing the survey area and sub-division into zones (which are in turn comprised of amalgamations of postcode sectors) is shown at Figure 4.1. The 'market shares' attracted to each centre/store within and surrounding the survey area are set out at Table 4 of Appendix I (for comparison goods) and Table 4 of Appendix II (for convenience goods). These are unchanged from the SORLNA.

Study base year

- 5.3 The SORLNA had a base year of 2014. This has been updated to 2017.

Interval and end years

- 5.4 The SORLNA forecast population, expenditure and levels of retail need at 2019, 2024, 2029 and 2031. Reflecting the new time frame for SODC's new Local Plan, which will run to 2033, this RNU adjusts the forecast years to 2022, 2027 and 2033. It is recommended that need forecasts beyond 2027 are considered indicative and should be subject to further review.

Population growth

- 5.5 The SORLNA used population projections provided by Experian for the base year and forecast years. Experian's population projections are bespoke to the 12 survey area zones, and are derived from ONS sub-national population projections. The ONS projections are informed by past trend levels of population growth.
- 5.6 For the purposes of this update we have used updated Experian population projections for each of the 12 survey zones for the study base year of 2017. For some of those zones which fall within South Oxfordshire District (zones 2, 3, 4, 5, 6, 8, 9 and 10) we have adopted an amended approach which has regard to the planned levels of housing growth which are expected to come forward across the District. These levels of growth are in excess of historic levels and therefore are not fully accounted for in Experian's population projections.
- 5.7 The stages to calculating the new levels of population growth for the survey area are as follows:
- **Stage 1:** SODC have supplied GVA with a housing growth trajectory, which sets out annual levels of housing growth by settlement, including at the strategic growth locations identified in Section 2.

- **Stage 2:** In collaboration with SODC, we have assigned each of these settlements / growth locations a survey zone.
- **Stage 3:** The total annual housing growth at the zonal level is then calculated by adding together the forecast housing growth coming forward in different settlements within the same survey zone. The majority of the housing growth is expected to come forward in zone 3, as this contains the strategic allocations at Berinsfield (up to 2,100 homes), Chalgrove (3,000 homes) and Wheatley (300 homes). The fourth strategic allocation at Culham (3,500 homes) falls on the boundary of zone 9/zone 10, but for the purposes of our assessment we have assumed that the allocation falls within zone 10, which covers Didcot.
- **Stage 4:** The annual housing growth figure by zone is converted to population, using a ratio of 2.48 persons per household. This figure is the average likely occupancy per household (1-4+ bedrooms) for new dwellings in South Oxfordshire District¹.
- **Stage 5:** The forecast population growth is added together for each of the interval periods, in order to show total population growth for the periods 2017-22, 2022-27 and 2027-33.
- **Stage 6:** The forecast population growth is applied to Experian's baseline (2017) population projections for each zone.
- **Stage 7:** For each of the interval years (2022, 2027 and 2033) the difference between the SODC policy-based population projections and Experian's population projections is established, and the balance (i.e. the difference between the policy-derived population projections and the Experian population projections) is added on to the Experian population projections, in order to ensure that the additional housing growth expected to come forward through the Council's policy allocations is fully accounted for.

5.8 The new population projections are summarised in **Table 5.1**. For zones which fall outside SODC, we have continued to use Experian population projections throughout the study period to 2033. Zones 4, 5 and 8 fall within SODC, but for these zones we continue to use Experian population projections throughout as SODC has not allocated any growth to these zones.

Table 5.1: Population growth by zone

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Total
2017	25,448	13,241	21,346	43,932	20,937	12,092	70,815	19,189	22,575	36,804	31,222	37,797	355,398
2022	26,757	14,627	24,253	45,061	21,477	13,689	73,537	19,658	25,774	43,758	32,131	39,082	379,804
2027	27,950	15,458	30,143	46,096	22,053	14,721	76,021	20,090	26,932	50,419	32,967	40,075	402,925
2033	29,220	15,686	45,313	47,327	22,692	15,070	78,814	20,466	27,113	56,098	33,885	41,235	432,920

¹ Source: South Oxfordshire Planning Obligations SPD, page 46
<http://www.southoxon.gov.uk/sites/default/files/S%20106%20Planning%20Obligations%20SPD%20April%202016.pdf>

Source: SODC housing growth trajectory (supplied July 2017) / Experian Location Analyst (accessed July 2017). Green-shaded zones denote those where SODC policy-based population growth applied. Other zones use Experian population projections throughout period to 2033.

5.9 The incorporation of the strategic allocations into the population forecasts means that the overall population for the survey area has significant increased relative to the position in the SORLNA:

- The SORLNA identified a base year population (at 2014) of the survey area of 347,413 persons, and using Experian population projections forecast this to increase to 382,183 persons by 2031, a growth of 34,770 persons or 10.0%.
- This RNU identifies a base year population (at 2017) of the survey area of 355,398 persons, and using a combination of Experian and SODC policy-based projections, forecasts this to increase to 432,920 persons by 2033, a growth of 77,522 persons or 21.8%.

Expenditure

5.10 The RNU incorporates updated per-capita spending figures for comparison and convenience goods for each of the survey zones, sourced from Experian. Expenditure growth rates are also updated, to reflect guidance set out in Experian Retail Planner 14 (published November 2016), as shown in **Table 4.2**. This shows that Experian expect comparison goods expenditure growth to be limited in the next couple of years, before returning to stronger levels of growth post-2019. Experian expect expenditure growth in the convenience goods sector to be extremely limited throughout the period to 2033, with negative expenditure growth in the period to 2019, no growth between 2019-23 and growth of just 0.1% per annum post-2023.

5.11 Both sets of expenditure growth rates represent lower growth rates than corresponding figures used in the SORLNA.

Table 5.2: Expenditure growth rates

Year	Comparison goods expenditure growth rate	Convenience goods expenditure growth rate
2017-18	1.4%	-0.2%
2018-19	1.0%	-0.9%
2019-23	3.0% (per annum)	0.0% (per annum)
2023-33	3.2% (per annum)	0.1% (per annum)

Source: Experian Retail Planner 14

Special Forms of Trading

5.12 As in the SORLNA, deductions are applied to the total 'pot' of comparison and convenience goods expenditure which is available to residents in the survey area to take account of Special Forms of Trading (SFT), which represents expenditure not available to support spending in shops, for example online/catalogue shopping. The deductions which we have applied for SFT for convenience and

comparison goods are derived from Experian Retail Planner 14 (November 2016), which update those used in the SORLNA.

- 5.13 The SFT figures we have used are summarised in Table 5.3. The 'claim' which comparison goods SFT makes on expenditure has increased throughout the duration of the study period relative to the SORLNA (which forecast a maximum comparison goods SFT claim of 15.5%); the convenience goods SFT has decreased slightly (the SORLNA forecast a maximum convenience goods SFT claim of 5.6%).

Table 5.3: SFT deductions

Year	Comparison goods SFT deduction	Convenience goods SFT deduction
2017	13.8%	3.2%
2022	15.8%	4.1%
2027	16.1%	4.7%
2033	16.4%	5.1%

Source: Experian Retail Planner 14

Commitments

- 5.14 'Commitments' represent planning permissions for new retail floorspace which have been granted by SODC, but were not implemented at the time of the household telephone survey. In the SORLNA, we identified the following commitments for convenience goods floorspace:

- **M&S, Orchard Centre Phase II, Didcot** (assumed net convenience goods sales area of 1,018 sq.m net, turnover in 2012 prices £11.32m);
- **Foodstore, Lupton Road, Wallingford** (net convenience goods sales area 2,208 sq.m, estimated turnover in 2012 prices £26.50m); and
- **Aldi, The Broadway, Didcot²** (net convenience goods sales area 969 sq.m; estimated turnover in 2012 prices £9.40m)

- 5.15 The following commitments for comparison goods floorspace were included:

- **Foodstore, Lupton Road, Wallingford** (net comparison goods sales area 601 sq.m; estimated turnover in 2012 prices £5.41m);
- **Aldi, The Broadway, Didcot** (net comparison goods sales area 171 sq.m; estimated turnover in 2012 prices £1.35m)

- 5.16 From discussion with officers at SODC, we have updated the above schedule of commitments with the following changes:

² The Aldi store in Didcot is already trading, but was not operational at the time of the household telephone survey, and accordingly it is included as a commitment. As no new household survey was undertaken in support of this RNU, the commitment is retained.

- The Aldi and M&S commitments in Didcot both continue to be included, but have adjusted turnovers on account of new information on operator sales densities (turnover per sq.m) which has been published since completion of the SORLNA.
- The commitment for a new foodstore at Lupton Road, Wallingford has been removed as this permission has now expired.
- We have included the following additional commitments:
 - **Orchard Centre Phase II, Didcot** – it has now been confirmed that a total of 6,427 sq.m net floorspace will be developed for class A1 comparison goods uses, expected to be split over 23 units. This commitment is in addition to that of the M&S foodstore, as set out above.
 - **Redevelopment of former Waitrose, Wallingford** – planning permission has been granted for the residential-led redevelopment of the former Waitrose store in Wallingford town centre. This development will include two retail units, with a total net sales area of 284 sq.m. We have assumed that 50% of this floorspace will be used for the sale of comparison goods and 50% for the sale of convenience goods.

5.17 The commitments, and their forecast turnovers at each of the interval years, are shown at Table 10 of Appendix I (for convenience goods) and Table 10 of Appendix II (for comparison goods). The tables show that in total there is 2,129 sq.m net of 'committed' convenience goods floorspace, which is forecast to achieve a turnover of £23.8m at 2027 / £24.2m at 2033, and 7,341sq.m of 'committed' comparison goods floorspace, which is forecast to achieve a turnover of £48.7 at 2027 / £56.8m at 2033.

6. Updated convenience and comparison goods need forecasts

- 6.1 Having made the adjustments to the inputs into the capacity assessment set out in the previous section, below we set out the updated quantitative 'need' for new convenience and comparison goods floorspace in SODC over the timeframe of the new Local Plan to 2033.

Convenience goods need

- 6.2 Table 11 of Appendix I sets out the updated convenience goods need which SODC will need to plan for, which is summarised in **Table 6.1** below.

Table 6.1: Summary of updated convenience goods need for South Oxfordshire District

	2022	2027	2033 (indicative)
Convenience goods need (sq.m net, rounded)	7,300	8,900	11,100

Source: Table 11, Appendix I

- 6.3 Table 6.1 shows that there is a need for SODC to positively plan for new convenience goods floorspace throughout its new Local Plan period, with a requirement for 7,300 sq.m net additional floorspace by 2022, 8,900 sq.m net by 2027 and indicatively 11,100 sq.m net by 2033.
- 6.4 These requirements represent a considerable uplift from those identified in the SORLNA, which identified a requirement of 3,700 sq.m net by 2031. This uplift can largely be attributed to the additional strategic housing growth which this study factors in to its population forecasts. In addition, the lapsing of the 'commitment' for a new foodstore in Wallingford has also freed up additional convenience goods expenditure to support new floorspace.

Comparison goods need

- 6.5 Table 11 of Appendix II sets out the updated comparison goods need which SODC will need to plan for, which are summarised in **Table 6.2** below.

Table 6.2: Summary of updated comparison goods need for South Oxfordshire District

	2022	2027	2033 (indicative)
Comparison goods need (sq.m net, rounded)	-400	10,600	24,700

Source: Table 11, Appendix II

- 6.6 **Table 6.2** shows that, notwithstanding the additional housing growth which we have modelled to come forward, there is no requirement for SODC to plan for any additional comparison goods floorspace until 2027. This is principally because of the 'commitment' for Orchard Centre Phase II in Didcot, the comparison goods turnover of which exceeds the growth in comparison goods expenditure which is expected to come forward in the period 2017-22. Accordingly there is a marginal 'over supply' of comparison goods floorspace until 2022.

- 6.7 However by 2027 there is a need for SODC to positively plan for additional comparison goods floorspace of approximately 10,600 sq.m net by 2027, increasing indicatively to 24,700 sq.m net by 2033. Forecasts beyond 2027 should be considered indicative and subject to further review during SODC's new Local Plan period.
- 6.8 The overall comparison goods requirement for the District is an uplift from that identified in the SORLNA, which identified a requirement for 16,300 sq.m net additional comparison goods floorspace. The uplift is due to the strategic housing growth which has been factored into the updated capacity forecasts.

7. Conclusions & recommendations

- 7.1 GVA has been instructed by South Oxfordshire District Council (SODC) to provide an update of the 'need' for new retail floorspace in South Oxfordshire District which the Council will need to plan for over its Local Plan period to 2033. This Retail Needs Update (RNU) follows on from the publication of the South Oxfordshire Retail and Leisure Needs Assessment 2016 (SORLNA), which was published in May 2016, and also prepared by GVA.
- 7.2 Subsequent to the publication of the SORLNA, SODC, as part of the preparation of its new Local Plan, has confirmed its key strategic locations for housing growth, and accordingly has requested an update to the retail capacity forecasts identified in the SORLNA, in order to ensure that the needs of the new residential populations are fully met. Both this RNU and the SORLNA will form part of the evidence base for SODC's new Local Plan. It is recommended that this RNU is read alongside the SORLNA as this report solely focuses on updating the quantitative need forecasts identified in the SORLNA, and does not update other elements of that report, such as the strategic recommendations for each of the District's town centres.
- 7.3 In Section 2 of this report, we have set out the updated policy position in South Oxfordshire District, setting out details of the Council's new Local Plan including the locations for the strategic allocations for new housing growth. Four locations for strategic housing allocations are identified, at Berinsfield (up to 2,100 homes), Culham (3,500 homes), Chalgrove (3,000 homes) and Wheatley (300 homes). The four market towns (Didcot, Henley-on-Thames, Thame and Wallingford) and the larger villages are all expected to deliver around 15% growth on top of their housing stock (at 2011).
- 7.4 In Section 3 we set out a brief update to current trends in the retail and leisure sector which the Council will need to be mindful of when considering its strategy for its network of town centres in its new Local Plan. In summary, we repeat the conclusions of the SORLNA that it will be important for District's network of town centres to be well-positioned to adapt to ongoing changes in the retail and leisure sector which will come forward over the Council's new Local Plan period, and to reaffirm their unique selling points which differentiate their retail offer from the nearby higher-order centres, rather than trying to directly compete with them. Heritage, tourism assets and other 'unique selling points' should be capitalised on, and robust place marketing strategies put in place.
- 7.5 In order to provide the Council with an up-to-date picture of future retail needs, we have incorporated the above strategic housing allocations into an updated set of population projections for the District and wider 'survey area'. The addition of the strategic housing allocations means that there is a substantial uplift in the population of the survey area relative to the position at the time of the SORLNA. We have also used the opportunity of a refresh of the District's retail capacity figures to update other key inputs into the need assessment, such as expenditure growth rates, 'special forms of trading' (which includes online shopping) rates, 'commitments' for new retail floorspace, and so on. A full description of the changes to the inputs into the needs assessment is set out in Section 5 of this RNU.

Summary of need

- 7.6 The updated quantitative retail needs for the District are set out in Section 6 of this report, and identify an increased level of retail need relative to the SORLNA, largely as a result of the uplift in population arising from the strategic allocations. The need figures are summarised in Table 7.1. We advise that figures beyond 2027 are considered indicative and should be subject to review throughout the Council's new Local Plan period.
- 7.7 There is a need for the Council to plan positively for both additional convenience and comparison goods floorspace over the new Local Plan period to 2033. However, owing to the 'commitment' of Orchard Centre Phase II, there is no requirement for additional comparison goods floorspace until the end of the Plan period (2027 and beyond). The need for additional convenience goods floorspace arises from 2022 onwards. **Table 7.1** shows there is a requirement for up to 8,900 sq.m net additional convenience goods floorspace by 2027, increasing to indicatively 11,100 sq.m net by 2033. There is a need for up to 10,600 sq.m net additional comparison goods floorspace by 2027, increasing to indicatively 24,700 sq.m net by 2033.

Table 7.1: Summary of updated convenience & comparison goods need for South Oxfordshire District

	2022	2027	2033 (indicative)
Convenience goods need (sq.m net, rounded)	7,300	8,900	11,100
Comparison goods need (sq.m net, rounded)	-400	10,600	24,700

Source: Table 11, Appendix I and Table 11, Appendix II

Strategic approach to distribution of need

- 7.8 Whilst this report does not seek to fully update the strategic recommendations set out in the SORLNA, it is recommended that the comparison goods capacity requirements identified above continue to be focused on Didcot as one of the two highest-order centres in the District. Residents in the strategic allocations (particularly those at Culham and Berisfield) will benefit from being located within easy access to Didcot town centre (as well as Abingdon), and the development of the strategic growth locations should ensure that these new communities benefit from quality, frequent public transport links to Didcot and Abingdon town centres. The other highest-order centre in the District's hierarchy, Henley-on-Thames, is a historic centre in which the ability to accommodate a significant quantum of additional retail floorspace is likely to be limited.
- 7.9 It is considered that a proportion of the identified retail need should be directed towards the identified strategic growth locations at Berinsfield, Culham and Chalgrove, with more limited growth directed towards the allocation at Wheatley. The new populations created at these settlements will be sizeable — the allocations at Culham and Chalgrove could potentially generate settlements of a comparable size in population terms to Wallingford, for example — and therefore it will be necessary to ensure that the day-to-day shopping needs of residents in these locations are provided for. We would expect the emphasis to be on providing convenience goods shopping facilities, together with complementary comparison goods shopping floorspace. The emphasis should be on ensuring that the needs of local

residents can be sustainably met, rather than any of the new centres acting as ‘destinations’ and therefore undertaking a role and function which undermines the existing retail hierarchy in the District.

Distribution of comparison goods need

- 7.10 We have indicatively allocated 60% of the comparison goods capacity requirements identified above to Didcot town centre; 20% (combined) to the market towns of Henley, Thame and Wallingford, and 20% (combined) to meeting the shopping needs at the strategic growth locations.
- 7.11 **Table 7.2** shows the suggested distribution of comparison goods floorspace in the District at 2027 and 2033, based on this indicative allocation. It is emphasised that the allocation is indicative only, and should the comparison goods floorspace requirements for each centre not come forward, the floorspace requirements should be directed to Didcot town centre in the first instance. The indicative distribution set out in Table 7.2 should also not prevent the development of new retail floorspace coming forward in any of the District’s existing network of higher-order centres (Didcot, Henley, Thame and Wallingford) should suitable development opportunities arise, provided that the development is of a scale in keeping with the role and function of the centre. It also does not prevent the need being brought forward to earlier in the Plan period in order to ensure that needs are met (this is likely to be particularly applicable in respect of the strategic allocations).
- 7.12 Of the 20% of the comparison goods requirement we have allocated to meeting the needs of the strategic growth locations, we recommend an indicative split of 7% to Chalgrove, 6% to Culham, 5% to Berinsford and 2% to Wheatley. These splits have regard to the different levels of growth which are expected to come forward at these locations, with the highest levels of growth planned at Chalgrove and Culham. Although Culham has a slightly higher number of dwellings planned (3,500) compared to Chalgrove (3,000), the former’s closer proximity to Abingdon and Didcot means that some residents may choose to look towards existing facilities in these centres, whereas Chalgrove is less well-located to a higher-order centre. These recommended splits are also shown in Table 7.2 – again it is emphasised they should be considered indicative.
- 7.13 To put the figures in Table 7.2 into context, there is currently approximately 2,800 sq.m comparison goods floorspace in Thame town centre, and 2,100 sq.m net comparison goods floorspace in Wallingford town centre.

Table 7.2: Indicative distribution of comparison goods floorspace between centres in South Oxfordshire District

	Indicative proportion of total requirement (%)	2027 sq.m net requirement	2033 (indicative) sq.m net requirement
Didcot town centre	60	6,400	14,800
Henley, Thame and Wallingford town centres (combined need)	20	2,100	4,900
Strategic allocations	20	2,100	4,900
- of which, Chalgrove	7	700	1,700
- of which, Culham	6	600	1,500
- of which, Berinsfield	5	500	1,200
- of which, Wheatley	2	200	500
Total	100	10,600	24,600

Source: Table 11, Appendix II. Figures may not add due to rounding.

Distribution of convenience goods need

7.14 In terms of the convenience goods capacity requirements, the SORLNA identified that the Council should:

- Ensure that new residential communities have access to an appropriate range of local-scale shops and services which enable day to day shopping needs to be met.
- Plan for an additional convenience goods provision in Henley-on-Thames, in the format of a single foodstore in the region of 1,500 to 2,000 sq.m net sales floorspace (i.e. broadly comparable in size to the existing Waitrose store), in order to enhance consumer choice, provide genuine competition to existing foodstores, and reduce the dominant trading performance of the Waitrose foodstore. Applications for new development should ideally be located in the town centre, so as to minimise impact of potential loss of footfall from Waitrose, or if no suitable town centre site is available, a sequential approach should be followed. Any new development should ensure a good level of integration with the existing retail offer, to enable the wider centre to benefit.
- Examine scope for inclusion of a small to medium-format foodstore (indicatively, up to 1,500 sq.m net sales) on the Cattle Market site in Thame town centre, having regard to the need for its comprehensive redevelopment, as part of future revisions to the Thame Neighbourhood Plan and Local Plan policies, in order to provide genuine consumer choice and competition for 'main' food shopping in Thame town centre.
- Seek to provide a new foodstore in Wallingford to improve consumer choice and competition; in the event that the permission at Hithercroft Industrial Estate does not come forward (this

permission has now lapsed, and on account of this lapse of permission it is recommended that the Council seek to provide a foodstore in the region of 1,500 sq.m net convenience goods sales area in Wallingford).

- 7.15 The SORLNA identified, therefore, a qualitative need to plan for additional convenience goods provision in Henley, Thame and Wallingford, and we continue to hold the view that these recommendations should be carried forward into the Council's new Local Plan. There is no pressing qualitative need to plan for additional convenience goods provision in Didcot due to recent foodstore openings and extant commitments for new floorspace. The Council should consider apportioning the balance of the convenience goods requirement (4,400 sq.m net at 2027, increasing to indicatively 6,600 sq.m net by 2033) towards the strategic allocations, to ensure that day-to-day shopping needs can be effectively met, as shown in **Table 7.3**. Again, we emphasise that the distribution set out in Table 7.3 should only be considered indicative.
- 7.16 In Table 7.3 we have identified that approximately 40% of the 4,400 sq.m net requirement for the strategic allocations should come forward at Chalgrove. We have identified that convenience goods floorspace of up to 2,600 sq.m net could be supported at this growth location by 2033, reflecting the significant amount of residential growth which is expected to come forward (3,000 dwellings) and the fact that the centre is some distance from existing higher-order centres (the nearest market town, Thame, is approximately 20 minutes' drive away). In order to ensure that shopping patterns are sustainable for residents in the new community, it is considered that as part of the requirement for up to 2,600 sq.m net convenience goods floorspace at this location, there is scope for a new medium-sized supermarket to serve the settlement (inactively, we would recommend this is in the region of 1,500 sq.m to 1,800 sq.m net convenience goods sales area) alongside local convenience and comparison shopping facilities.
- 7.17 As with the comparison goods capacity requirements set out above, although Culham is the largest strategic allocation (3,500 dwellings), its proximity to both Abingdon and Didcot means that it is likely that some residents in the new community will look towards existing convenience goods shopping facilities in these two centres. Accordingly we recommend that 30% of the identified convenience goods requirement (up to 2,000 sq.m net by 2033) is directed towards Culham, with 20% (up to 1,300 sq.m net by 2033) directed to Berinsfield. A more limited requirement of 10% of the total (up to 700 sq.m net by 2033) is directed to Wheatley, reflecting the fact that (1) the amount of growth expected to come forward here is, at 300 dwellings, more limited and (2) Wheatley is already served by a large Asda foodstore on the edge of the village which can be expected to cater for main/bulk food shopping needs.

Table 7.3: Indicative distribution of convenience goods floorspace between centres in South Oxfordshire District

	Convenience goods floorspace (sq.m net) 2027	Convenience goods indicative floorspace (sq.m net) 2033
Convenience goods requirement at 2027	8,900	11,100
Less new foodstore at Henley (indicative sales area)	1,500	
Less new foodstore at Thame (indicative sales area)	1,500	
Less new foodstore at Wallingford (indicative sales area)	1,500	
Balance for strategic allocations (combined)	4,400	6,600
- of which, Chalgrove (40%)	1,700	2,600
- of which, Culham (30%)	1,300	2,000
- of which, Berinsfield (20%)	900	1,300
- of which, Wheatley (10%)	400	700

Source: Table 11, Appendix I. Figures may not add due to rounding.

Future review

- 7.18 Finally, we repeat our advice set out in the SORLNA that the Council should consider to adopt a close monitoring approach to town centre change, the economy, planning applications/permissions, and developments in the wider sub-region. There is potential for the shopping patterns of residents in the District to change in future years, on account of development of Phase II of the Orchard Centre in Didcot town centre, and the redevelopment of the Westgate Centre in Oxford. It is therefore important that the Council's retail capacity forecasts are updated at regular intervals through its new Local Plan period, and that an updated household telephone survey is undertaken in support of a refresh of the capacity forecasts for the District 1-2 years after the opening of the Orchard Centre Phase II and/or Westgate developments.

